SIMPLE IT BUSINESS CASE TEMPLATE

SUBMITTED TO		SUBMITTED BY	
TO THE ATTENTION OF		POINT OF CONTACT	
ADDRESS		ADDRESS	
PHONE		PHONE	
EMAIL		EMAIL	
DATE SUBMITTED		DELIVERY METHOD	

EXECUTIVE SUMMARY

The Executive Summary consists of no more than one page and presents a concise summary of the business case. The reader should be able to clearly understand the grounds for the request just by reading the summary.

CURRENT IMPLEMENTATION

Describe the software and hardware used in the existing implementation. Describe the resources required to maintain the current setup. For example, you might specify the financial costs and also the work hours needed for maintenance processes. Consider other measurements, such as usage statistics.

REASON for CHANGE

Why is a new setup necessary? Make a clear case for the new solution, keeping in mind that your readers have competing appeals for resources. Detail why the existing implementation no longer works and why. Some reasons include product incompatibilities, equipment or software failures, maintenance difficulties, new processes that must be supported, increased staffing, and new regulations and compliance guidelines.

FINDING A NEW IMPLEMENTATION

Explain the processes you used to find the new solution. Briefly describe any research sources. Detail any product demos you tried, vendor presentations or trade shows you attended, any other in-person research you conducted. It gives management a lot of confidence when they see that you have done a lot of due diligence.

REVIEW of OPTIONS

List the predetermined requirements for your new solutions. If possible, compare the features of each product side-by-side with these requirements. Ideally, this should reveal your chosen option as the best possibility.

POSSIBLE VENDORS

Describe possible vendors for the new implementation. Discuss the company and the unique characteristics of their solutions. It can boost your case if you have researched at least a few vendors.

BENEFITS of an UPDATE

Benefits describe not just features and how something works, but how the product can positively impact the organization beyond just making IT more efficient.

KEY PERFORMANCE INDICATORS

Key performance indicators, or KPI, provide a means to show whether new product and implementation is a success or not. Use the benefits described earlier to determine KPI.

IMPLEMENTATION RISKS

List possible risks of this change, both big and small.

SUGGESTED VENDOR

Use your purchase criteria to explain why this vendor is the best selection. Also list any other supporting characteristics they may not have appeared on your original list. If this implementation is above budget, detail your justification for the added costs.

OPTION COSTS

Thoroughly detail all costs for the recommended implementation so that you do not find yourself having to ask for more money as the setup progresses. Also consider and note indirect costs, such as system downtime.
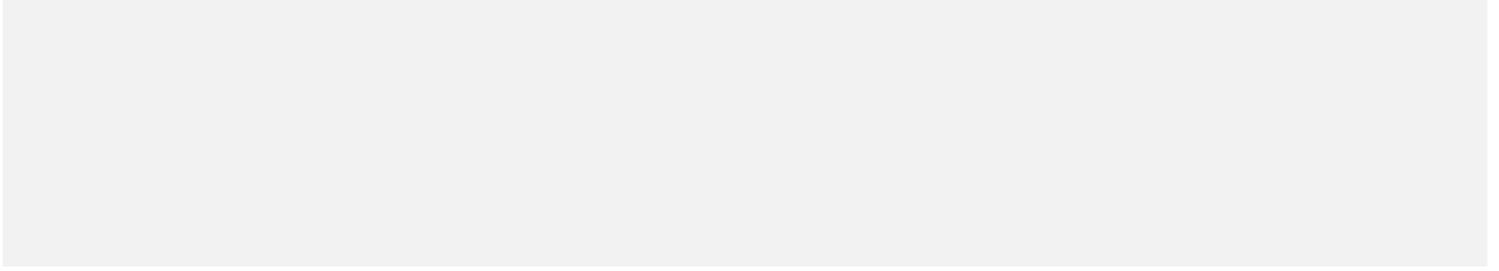
TECHNOLOGY MIGRATION

Explain the plan and high-level schedule for backups and setup of any new systems.

IMPLEMENTATION PROGRAM

Describe in detail how the new system will be implemented, including key personnel, backups, system stoppages, and important dates and deadlines.

CONCLUSION

Complete your business case with a strong and clear request for the materials, money, and other resources you need to complete the new IT implementation.

DISCLAIMER