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**BUSINESS CASE TEMPLATE**

VERSION NUMBER 1.2.1

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| --- | --- | --- |
| **Prepared By:**  ABC | **Title:**  XYZ | **Date:**  Feb 20, 2030 |

**Project Definition**

|  |  |  |
| --- | --- | --- |
| **Project Name:** Add here | **Project Sponsor:** Add here | **Project Manager:** Add here |

**Version History**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Version** | **Approved By** | **Revision Date** | **Description of Change** | **Author** |
| 1.1 |  | Feb 20, 2030 | Change 1 |  |
| 1.2 |  | Feb 25, 2030 | Change 2 |  |
| 1.3 |  | Feb 27, 2030 | Change 3 |  |

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# Executive Summary

The Executive Summary is used to provide an overview of the project. It should include a summary of the problem and opportunity, the proposed solution, expected benefits, and a quick snapshot of financials. Including employee quotes and use cases and to connect it with the day-to-day needs of the organisation.

This should take under three minutes to read and provide all the information needed to have a solid overview of the project and its requirements.

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| It is proposed that ABC organisation invest $150,000 to implement and organisational chart solution and commit to a three-year contract.  The key objective of this project is to find an org charting tool that can support workforce planning, restructures and provide greater visibility of organisational structures and workforce characteristics across the organisation. The solution will be visible to all employees, however access to specific data and functionality will be determined based on roles and requirements. An organisational design tool will provide the following benefits:   * Enable improved workforce planning by providing a clear view of the organisation structure, clarity on staffing levels and easy identification of vacant positions and important workforce characteristics. * Enable easy collaboration and assessment of workforce design proposals. * Reduce manual workload for HR Managers and provide immediate access for Senior Managers by providing real-time, configurable and easily viewable workforce plans, charts and reports. * Gain a more comprehensive understanding of the workforce using real-time data. * Enable the capability to monitor real-time progress of the organisation design process. * A market scan was completed and a shortlist of three solutions evaluated. Solution A has been selected based on it meeting our cyber security standards and compatibility with our HRIS system. Solution A will support our long-term strategic objectives of process efficiency, systems governance and data security compliance. |

# Problem Statement

**Background and Key Project Drivers**

Briefly explain the content and reasons for the project. This section should provide a clear understanding of the current situation, the challenges or opportunities the project addresses and its key objectives. The goal is to establish a clear understanding of why this project is necessary and what it aims to accomplish.

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| The key objective of this project is to implement an organisational design tool that supports workforce planning, restructures and improves visibility of organisational structures and workforce characteristics. Currently, the organisation faces challenges in efficiently managing these aspects due to the lack of a comprehensive tool. This project aims to enhance collaboration, reduce HR workload, improve access to real-time date and monitor the progress of organisational design initiatives. This will be achieved by implementing an automated organisation design tool that will:   1. Improve visibility of the workforce 2. Maintain data security and data integrity throughout the organisation design process. 3. Help with effectively distributing our employee resources. 4. Enable scenario planning to address the peaks & troughs in workloads across the organisation. 5. Remove time-consuming administration from organisation design projects work. 6. Develop wider, cross-organisation thinking and alignment between business priorities and workforce structure and characteristics. |

# Options Considered

This section outlines the various alternatives that were evaluated before selecting the current project approach. It provides a summary of the different options considered, along with their respective pros and cons and the rationale behind the final decision. The goal is to document due diligence in reviewing multiple options.

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| **Option** | **Pros** | **Cons** | **Cost** | **Risk** |
| **Develop a Custom-Built Tool:** Create a bespoke organisational design tool tailored specifically to the company's needs. | Fully customised to fit organisational requirements.  Flexibility to adjust and scale as needed.  Can integrate seamlessly with existing systems. | Long development time before deployment.  Requires ongoing support and updates. | Significant upfront cost for development.  Additional costs for future updates and maintenance. | Substantial risk of delays and budget overruns during development.  Dependence on internal or contracted developers for long-term maintenance. |
| **Implement a Comprehensive HR Software Suite:** Adopt a full-scale HR software suite that includes modules for workforce planning, organisational design and reporting. | Integrated solution covering all HR functions.  Real-time data across various HR activities.  Comprehensive support for workforce planning and organisational visibility. | May include unnecessary features, increasing complexity.  Requires extensive training for staff to use all functions effectively. | High initial investment for purchase and implementation.  Ongoing maintenance and licensing fees. | Potential for low adoption due to the complexity of the system.  High dependency on a single vendor for all HR functions. |
| **[Recommended option]**  **Use a Cloud-Based Workforce Planning Tool:**  Implement a cloud-based tool designed specifically for workforce planning and organisational design. | Quick to implement with minimal setup time.  Lower upfront costs with scalable subscription-based pricing.  Accessible from anywhere with internet access. | Focused on a specific set of functionalities. | Ongoing subscription fees.  Potential additional costs for premium features or integrations. | Vendor dependency for updates and system reliability. |

# Scope (In / Out)

This section defines the boundaries of the project, clearly outlining what is included and excluded from its scope. It specifies the key deliverables, activities and areas that will be addressed, as well as any elements that are explicitly out of scope. The goal is to ensure a shared understanding of the project's focus, prevent scope creep and set clear expectations for stakeholders regarding what will and will not be covered by the project.

**Scope Summary / Explanation**

This project will implement a new organisational design tool with integration of current workforce data, customised configurations, and comprehensive testing. Key outputs include:

* Tool selection and integration
* Customisation to fit organisational roles
* Testing for functionality
* Training and support for key users

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| **In Scope** | **Description** |
| **Tool Selection** | Evaluation and selection of the most suitable organisation design tool that meets the project’s key objectives. |
| **Data Integration** | Integrating existing workforce data into the new tool, ensuring all relevant organisational structures and workforce characteristics are accurately represented. |
| **Customisation** | Configuring the tool to align with the specific roles and requirements of the organisation, including access controls and role-based functionalities. |
| **Testing & Validation** | Comprehensive testing of the tool to ensure it meets all functional and performance requirements before full deployment. |
| **Training & Support** | Training sessions for HR managers, senior managers and other relevant users, as well as ongoing support during the initial rollout. |

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| **Out of Scope** | **Description** |
| **Custom Software Development** | Development of new software features outside the standard functionalities of the selected tool. |
| **Legacy System Integration** | Integrating the tool with older, non-critical systems that are not related to workforce planning or organisational design. |
| **Post-Implementation Enhancements** | Any future enhancements or additional features requested after the initial implementation phase, beyond what was agreed in the project plan. |
| **Comprehensive Change Management** | Large-scale organisational change management efforts beyond training and tool adoption, such as reshaping entire departments or roles. |
| **External Vendor Management** | Managing third-party vendors beyond the selected tool provider, such as additional consultants or service providers not directly tied to this project. |

# Stakeholder Engagement and Change Management

This section outlines the strategy for engaging stakeholders and managing the changes associated with the project. It provides a clear understanding of how key stakeholders will be identified, communicated with and involved throughout the project. The section also addresses how change will be managed to ensure smooth adoption of the new organisation design tool. The goal is to foster collaboration, minimise resistance and ensure that all parties are aligned with the project’s objectives and processes, leading to successful implementation and adoption.

**Stakeholder Engagement**

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| --- | --- | --- |
| **HR Managers** | **Senior Managers** | **IT Department** |
| **Role**: Key participants in tool selection and customisation to ensure it meets workforce planning needs.  **Engagement Strategy**: Regular workshops and feedback sessions to gather input and align the tool’s functionality with HR requirements. | **Role**: Decision-makers and primary users of the tool’s reporting and analytics features.  **Engagement Strategy**: Monthly briefings to keep them informed on project progress and tool capabilities, ensuring alignment with strategic goals. | **Role**: Support in integration and implementation of the tool within the existing tech infrastructure.  **Engagement Strategy**: Continuous collaboration during the technical setup phase to ensure seamless integration. |

**Change Engagement**

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| **Communication Plan** | **Training programs** | **Resistance Management** |
| **Strategy**: Develop a comprehensive communication plan to inform all employees about the new tool, its benefits and how it will impact their roles.  **Tactics**: Regular updates via email, intranet and group meetings to keep everyone informed and engaged. | **Strategy**: Implement targeted training sessions for different user groups (HR, senior management, general staff) to ensure smooth adoption.  **Tactics**: Hands-on workshops, online tutorials and ongoing support to build confidence and competence in using the new tool. | **Strategy**: Identify potential areas of resistance early and address concerns through open forums and one-on-one discussions.  **Tactics**: Provide clear explanations of the tool’s benefits, address fears of change and offer additional support where needed. |

# Project Benefits

This section details the expected project benefits, divided into quantifiable (e.g., cost savings, efficiency gains) and non-quantifiable (e.g., improved collaboration, employee satisfaction) outcomes. The aim is to present a clear picture of the project's overall value to the organisation.

## Quantifiable Benefits

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| **Increased Efficiency** | **Measurement**: 20% reduction in time spent on workforce planning activities due to automated processes and improved visibility. |
| **Cost Savings** | **Measurement**: $100,000 annual savings from reduced manual data entry and reporting tasks and decreased reliance on external consultants. |
| **Improved Data Accuracy** | **Measurement**: $100,000 annual savings from reduced manual data entry and reporting tasks and decreased reliance on external consultants. |
| **Faster Decision-Making** | **Measurement**: 25% reduction in the time required for management to access and analyse workforce data. |

## Non-Quantifiable Benefits

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| **Enhanced Collaboration** | **Impact**: Improved teamwork and communication across departments due to shared access to workforce data and collaborative tools. |
| **Better Workforce Planning** | **Impact**: More strategic and informed decisions around staffing, restructuring and talent management. |
| **Increased Employee Satisfaction** | **Impact**: Higher morale and engagement from staff due to greater transparency and more efficient HR processes. |
| **Organisational Agility** | **Impact**: The organisation becomes more adaptable and responsive to changes in workforce needs and market conditions. |

# Financial Analysis

This section offers a detailed examination of the project's financial aspects, including cost estimates, budget requirements and potential financial benefits. It provides an overview of the financial investment needed, the anticipated costs and the expected return on investment. The goal is to ensure that the project’s financial requirements are clearly understood and justified, supporting informed decision-making and demonstrating alignment with organisational goals.

**Overview:** Regular consultations with the Finance Manager will be conducted to ensure the project remains within its budget. This includes monitoring expenditures, comparing actual costs against the budgeted amounts and adjusting as needed.

**Purpose:** To maintain financial control and ensure the project stays on track financially, with timely identification and management of any budgetary issues.

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| **Estimated Cash Flows** | **Pre-2024** | **2024** | **2025** | **2026+** | **Total** |
| **Project Budget** | $40,000 | $120,000 | $80,000 | $30,000 | **270,000** |
| **Operational Costs** | $10,000 | $50,000 | $30,000 | $10,000 | **100,000** |
| **Training & Support** | $5,000 | $20,000 | $10,000 | $5,000 | **40,000** |
| **Contingency** | $3,000 | $15,000 | $5,000 | $5,000 | **28,000** |
| **Total Estimated Cost** | **$58,000** | **$205,000** | **$125,000** | **$50,000** | **438,000** |

**Budget Breakdown**

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| **Description** | **Cost** |
| **License (annual fee based on a 3-year contract period – ex GST)** | **$45,000** |
| **Implementation (Vendor Services)** | **$35,000** |
| **Staff Costs – Based on a six-month project period.** | |
| Project Manager – $1,200 per day (based on 15 consulting days) | **$18,000** |
| HRIS Consultant – $2,000 per day (consulting over a 3-week period) | **$30,000** |
| IT Systems Architect – $2,000 per day (consulting over a 2-week period) | **$28,000** |
| Training and Communications – $1,000 per day (consulting over a 2-week period) | **$14,000** |
| **Subtotal** | **$170,000** |
| **Contingency (5%)** | **$8,500** |
| **Project Budget** | **$178,500** |

**Operational Impact**

|  |  |
| --- | --- |
| **Description** | **Estimated Cost p.a** |
| Annual License Fee - 2024 | **$45,000** |
| Annual License Fee - 2025 | **$45,000** |
| Annual License Fee - 2026 | **$45,000** |
| **Total Operational Impact** | **$135,500** |

# Implementation Plan and Risk Assessment

## Project Approach & Timing

This section outlines the overall strategy for executing the project, detailing the steps to be taken, the timeline for each phase and key milestones. It provides a clear understanding of how the project will be managed from initiation to completion, including any dependencies or critical path activities. The goal is to ensure all stakeholders are aware of the project’s approach, schedule and timing, helping to align expectations and prepare for timely execution.

## Project Plan

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| --- | --- |
| **Focus** | **Deliverables** |
| **Introduction** | * Kick-off meetings to introduce the project team. * Overview of required documentation and access approval processes. |
| **Discovery** | * Review current systems and data integration needs. * Prepare environment for tool installation. * Conduct discovery sessions with HR representatives and other relevant business areas. |
| **Implementation** | * Install and configure the organisational design tool. * Integrate with existing HR systems and configure workforce modelling. * Establish connections to external authentication systems. * Set up charts, security settings and required modules. |
| **Testing** | * Execute comprehensive test plan to verify system functionality. * Conduct User Acceptance Testing (UAT) and gather feedback. * Address issues identified during testing and rework, as necessary. |
| **Delivery** | Conduct on-site training sessions for HR and other relevant users. |
| **Support** | Provide ongoing support and troubleshooting post-implementation. |

## Project Milestones

|  |  |
| --- | --- |
| **Milestone** | **Weeks** |
| **Planning** |  |
| Business case Approval | August 2024 |
| Project Commencement | October 2024 |
| **Design** |  |
| Timelines, Roles, Responsibilities | Week 1 |
| **Build** |  |
| Installation, Setup, SSO Setup | Weeks 2-5 |
| **Test** |  |
| Unit Testing, Integration Testing, UAT | Weeks 6 |
| Testing Corrections | Weeks 7 |
| **Deploy** |  |
| On-site Training | Weeks 8 |
| Go-Live Preparations |  |
| **Go-Live** | **December 2024** |
| Operational Handover/Hypercare | Week 9 |
| **Rollout to Broader Organisation** | **February 2025** |
| **Post-Implementation Review** | **Three months post-implementation** |
| **Project Closure** | **April 2025** |

## Project Risks

This section identifies and evaluates potential risks associated with the project, detailing their likelihood, potential impact and mitigation strategies. It provides a structured approach to anticipate, assess and address risks that could affect the project’s success. The goal is to ensure that all risks are considered and managed proactively to minimise their impact on project outcomes.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Risk** | **Controls** | **Mitigation Status** | **Current Risk Rating (L, M, H, VH)** | **Risk Owner (Position)** |
| **Technical Failures** | Regular system checks, robust testing protocols | Ongoing testing and quality assurance | M | IT Manager |
| **Budget Overruns** | Strict budget tracking, contingency funds | Budget reviews and adjustments as needed | M | Project Finance Lead |
| **Resource Shortages** | Cross-training of staff, flexible resource allocation | Resource planning and backup strategies | H | HR Manager |
| **Stakeholder Resistance** | Stakeholder engagement and communication plans | Regular updates and feedback sessions | M | Project Manager |
| **Integration Issues** | Detailed integration planning, pilot testing | Close monitoring during integration phase | H | Systems Analyst |
| **Data Security Concerns** | Implementing strong security protocols and regular audits | Regular security reviews and updates | VH | IT Security Specialist |

# Approvals

**Steering Committee / Project Endorsement / Sponsors**

This section details the key individuals and groups responsible for project oversight and approval. It clarifies the roles of the Steering Committee, the endorsement process and the sponsors, ensuring that the project has the necessary support and governance to succeed.  
  
**Steering Committee**

A Steering Committee will be formed upon approval of this business case, in line with the DPO Project Steering Committee Guidance. This committee will oversee the project, ensuring alignment with strategic goals and effective governance. The business case has been developed by the Project Sponsor and Project Manager and is endorsed by key stakeholders to confirm its feasibility and strategic alignment.

**Project Endorsement**

|  |  |  |
| --- | --- | --- |
| **Compulsory Validator** | **Endorsed Risk** | **Validated by (Name)** |
| Risk & Compliance | Strategic Risks or those unique to the project |  |
| Finance | Financial Summary |  |
| Procurement | Scope, Procurement Approach, Digital Accessibility |  |

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| **Additional Validator** | **Endorsed Risk** | **Validated by (Name)** |
| Project Steering Committee | Scope, Benefits, Program Approach | Committee Members |