

Building a Winning Business Case

An effective business case clearly communicates an opportunity (problem) for change (modernization), the benefit(s) expected to be achieved through the activity, alternatives considered, funds needed and an anticipated timeline for value realization and the potential for investment recovery. A good business case gives decision makers confidence that the modernization recommendation has undergone rigorous analysis and that it is the best option to overcome existing problems and realize desired outcomes.

The level of detail, complexity of analysis and even the size of the document should be proportional to the scale of the problem, the size of the modernization investment, the anticipated outputs, and outcomes to be realized, and the level of effort expected to be expended. A winning business case is clear (easily understood, logically structured), concise (to the point, factually based) and persuasive (presents a compelling argument).

Key Questions

1. What key elements will you include in the executive brief to ensure stakeholders understanding of the business problem and the proposed solution(s)?
2. What evidence will you present to support organization readiness, including proof of concept, prototype, or pilot results, or key performance indicator analysis you have conducted?
3. How will you ensure your recommendations align to the agency's desired outcomes?
4. How does your modernization plan incorporate strengths, weaknesses, opportunities, and threats and consider alternative recommendations?
5. How will your plan address investable resources, recovery methods and timelines for return on investment?
6. What funding sources have you identified?

7. How will your plan address the cost of not modernizing?
8. How will your implementation plan address change management, governance, and accountability?
9. What reporting mechanisms will your plan include?
10. What future steps are required to reinforce a culture of continuous improvement?

Checklist

Define a clear Value Proposition Statement by including the benefit, uniqueness, and feasibility of the modernization activity, while addressing the needs of stakeholders.

Visit the sample documentation from previous modernization business cases on the M3 Example MAX Page.

Follow the Building a Winning Business Case guide from the HR Modernization Playbook.

Establish an executive roundtable review of the business case to ensure engagement and alignment with agency leadership.

Revise the Business Plan in accordance with agency priorities and available resources.

Identify modernization plan owners responsible for execution and delivery of successful outcomes on budget.

Monitor, document, and report on plan deliverables and modernization results while identifying additional opportunities for continuous process improvement.

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