

NEW BUSINESS DEVELOPMENT & SALES · TEMPLATE

Business Case Builder Worksheet

For account executives and founders building a business case with their champion that a sceptical finance leader can check and approve.

How to use this: Fill this in with your champion, using the buyer's own numbers. Label every estimate with its source. Show a conservative and an expected case, and keep the final summary to one page.

Baseline: What the Problem Costs Today

Use their figures wherever they exist. Agree the loaded hourly cost with finance.

Measure	Figure	Source (whose number?)
How often the problem occurs		
Time spent (per occurrence or per week)		
People involved		
Loaded hourly cost		
Direct costs: penalties, rework, contractors, lost revenue		
Annual cost of the problem today		

Value Drivers

Be explicit about which benefits are hard money and which are not.

Value type	Benefit, in their terms	Conservative	Expected	Hard or soft?
Revenue growth				
Cost reduction				
Risk reduction				
Capacity and time				
Total annual benefit				

If we count freed time, how does it become cash? (avoided hire, less overtime or contractor spend, growth absorbed)

Full Cost of the Investment

Showing the full cost makes the benefits more credible, not less.

Cost item	One-off	Annual
Subscription or licence		
Implementation and configuration		
Integration and data work		
Internal staff time		
Training and change management		
Parallel running or switching costs		
Less: tools or contracts cancelled		
Total		

Scenarios, Payback and Return

Keep the maths simple enough to check on a calculator.

	Conservative	Expected
Annual benefit		
Annual ongoing cost		
Net annual benefit (benefit minus ongoing cost)		
Monthly net benefit (net annual divided by 12)		
One-off costs		
Payback in months (one-off divided by monthly net)		
Three-year net return (3 x benefit, minus 3 x ongoing, minus one-off)		
Ramp-up allowance (months of partial benefit)		

If the main assumption is half what we expect, does it still pay back? How long would it take?

Cost of Doing Nothing

Use the same baseline and the same honesty.

What does the problem cost over the next 12 months if nothing changes?

What evidence shows it is getting worse? (volume, new sites, contracts, deadlines)

One-Page Summary

In the order a decision-maker reads it, using their language.

The problem: what is happening, what it costs and why now

The recommendation

The investment: one-off and ongoing, over the term

The return: conservative and expected, payback and three-year net return

Risks and mitigations

How success will be measured: metric, baseline and review date

The decision required: what approval, from whom, by when

CFO Question Check

Tick each question the summary already answers.

- ☐ Where does each number come from, and who agreed it?
- ☐ What happens if the benefit is half what we expect?
- ☐ Is the saving real cash, or freed time that will not change the budget?
- ☐ When does the money go out, and when do the benefits come in?
- ☐ Who owns delivering the benefit, and how will we know it is working?
- ☐ What is the contract term, and what are our options if it does not work?
- ☐ What else could we do with this money, including doing nothing?

Approval Path

Find this out early, ideally during discovery.

Spending thresholds, and who approves at each level

Is budget allocated, or does this go into the next planning round?

Dates of approval or investment meetings

Who presents the case, and can we brief finance directly?
