

# BUSINESS CASES THAT GET RESULTS

Carrie Marshall





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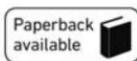
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**Carrie Marshall** is a journalist, copywriter, ghostwriter and broadcaster from Glasgow. A professional writer for 20 years, she has written thousands of features, columns, reviews and news stories for a huge range of magazines, newspapers, websites and trade publications. As a copywriter she has crafted copy for some of the biggest names in the technology, retail, audio and finance industries, and as a novelist she sold enough copies of her self-published debut to buy a car. Not a great car, but still: a car! Under various names, Carrie has written 11 non-fiction books, co-written six more and co-written a six-part Radio 2 documentary series. She blogs at [bigmouthstrikesagain.com](http://bigmouthstrikesagain.com) and tweets as [@carrieinglasgow](https://twitter.com/carrieinglasgow).

# PREFACE

A business case is a very important document: whether it's printed out or delivered as a presentation, its job is to persuade an organisation to do something differently. That might require significant upheaval, significant investment or both, and that means even the brightest idea may face resistance.

Putting together a business case is rather like putting together a legal case, although it's a lot less likely to be made into a movie. You're putting forward an argument and providing evidence to back it up. If your argument is persuasive enough, you'll get the result you want: the green light to go ahead.

In this book we'll consider the techniques and tips that get results.

In [Chapter 1](#) you'll discover what a business case is and how it's different from other documents, such as project proposals.

In [Chapter 2](#) we'll determine the key questions that your business case must answer.

[Chapter 3](#) is all about stakeholders, the people who will be affected directly or indirectly by your preferred course of action.

[Chapter 4](#) looks at the mechanics of putting your business case together and what key sections it should include.

## PREFACE

In [Chapter 5](#) we'll identify the importance of identifying and quantifying the benefits your business case is designed to deliver.

[Chapter 6](#) is where we become Eeyore, and consider what might possibly go wrong – and what we can do to prevent that from happening.

In [Chapter 7](#) we get our spreadsheets out to calculate return on investment (ROI) in different scenarios.

In [Chapter 8](#) we look at friendly fire, the internal opposition that can make implementing change more difficult and the strategies you can use to avoid and address it.

[Chapter 9](#) is about presentations and how to utilise them effectively.

[Chapter 10](#) discusses how to refine your business case to get the maximum effectiveness.

[Chapter 11](#) highlights the steps to successfully submit your completed business case.

# 1 INTRODUCTION: WHAT IS A BUSINESS CASE?

No business is perfect, and no business will ever be perfect. There will always be a way to do things more efficiently, more cost-effectively, more environmentally responsibly – and in our ever-changing, high-tech world, what's impossible today will often be unremarkable tomorrow. And that means there will always be a need for somebody to put forward a business case.

A business case is a written argument, a proposal for making things better. It could be a simple idea expressed in a few paragraphs – 'if we switched to this supplier, we'd spend a lot less' – or it could be a thick document that's taken months to put together. But at heart, every business case says the same thing: something should be done, and here's how to do it.

No matter how complicated or detailed it may be, or how many appendices it has, every business case addresses five key questions: why, what, how, when and who.

The answer to the first question, the why, looks at the status quo and identifies the reasons why it isn't good enough. If everything was just fine, you wouldn't be proposing to do anything differently.

The answer to the second question, the what, details the changes you think are necessary to address the issues you've identified.

The answer to the third question, the how, explains the mechanics of what needs to be done – as well as how much it's going to cost and how long it's likely to take.

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The when is all about timescales. Will this change be overnight, or will it need to be approached in stages? If there will be disruption or downtime, how long will that last?

Finally, the answer to the fifth question, the who, details the person or people who are going to actually make it all happen.

A well-researched, well-argued and well-written business case can make the difference between a project being rejected out of hand and a project being enthusiastically green-lit.

A business case isn't the same thing as a business proposal, although there's some overlap between the two kinds of documents. A business proposal is a much shorter, less detailed document. Your proposal essentially says: 'I have an idea!' Your business case is where you deliver the detail: why your idea's time has come, what benefits it will bring and what's needed to make it happen. Its job is to persuade a decision maker to approve the project and to agree to provide the necessary resources.

A business case is also different from a business plan. A business plan is a strategic document for the entire business; a business case is for a single strategy or project. Deciding to expand into China is a job for a business plan. Suggesting standardising field staff on iPad apps or moving to a hosted software solution is a job for a business case.

In this book we'll explore the key attributes of successful business cases. We'll dive into the key questions every business case must answer, the challenges of corporate inertia and internal opposition, the traps that can make a compelling case fail and the importance of identifying not just the people who'll be involved in your proposed changes, but the people who'll be affected by them too. We'll look at the big picture and the little details, from how to structure your business case to how to calculate return on investment (ROI) for different scenarios. And we'll discover how PowerPoint can be a force for good if you approach presentations in the right way.

## KEY TAKEAWAYS

- A business case is longer than a proposal and covers different things. A proposal says: 'I have an idea!' A business case has the detail.
- A business case is for a single project or strategy. A business plan is for the entire organisation.
- A business case says 'Here is what needs to be done' and backs that up with evidence.

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Carrie Marshall

A business case is a logical, structured argument to bring about business change, aimed at the decision makers in an organisation. A persuasive, well-written business case can win over your readers and get you the all important approval you need.

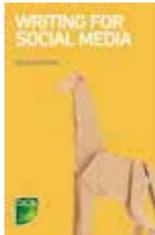
In this book you'll uncover the do's and don'ts of pitching your ideas through a business case. You'll learn what the essential components of a business case are, including what key questions you should be answering, how to structure your business case, factors to consider when thinking about benefits and risks, and how best to tackle return on investment (ROI).

- **Discover why a well written and researched business case is so important**
- **Explore the questions your case should answer, and how best to produce your business case**
- **Consider benefits, outcomes and risks for the change you're proposing**
- **Learn how to calculate and present the financials for your case**
- **Advice for making your case through a presentation**

## ABOUT THE AUTHOR

Carrie Marshall is an author and freelance journalist, columnist, copywriter and scriptwriter. She writes features, news and tutorials about technology and has been published in many industry magazines including *PC Plus*, *Digital Home* and *What Laptop*. Since 2003, Carrie has also regularly spoken on technology and social media on BBC radio.

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*Moderator for the UK IT Industry Awards, author of Service Desk and Incident Manager*

*'A highly valuable resource, and one that would be well worth keeping to hand.'*

**A P Sutcliffe, MSc, MBCS**

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