Business Case

Name

Document Date: March , 2025

INSTRUCTIONS

This is a Word Template provided by Altus to help you begin your journey of using Altus for Word.

Please feel free to edit this template and then get users to use this as a starting point when creating a document that meets your organisational need.

Some out-of-the-box Altus fields have already been connected to this document, so all you need to do is connect this document to your project and click **Update Data**. For instructions on how to do this, please see below.

This document contains the following:

* Green highlighted sections: indicate areas of the document that need to be entered manually and cannot be connected to data directly from Altus.
* Grey text: data from Altus that will be updated on Updates.

Pre-requisite:

If you haven’t already read the Altus for Word documentation, please take the time to do so now:

* Have Altus for Word Add-in installed; if you need to instal it, please read [this section in Altus docs](https://docs.altus.pro/solutions/AltusForWord/Index.html#installation).
* Have Altus for Word button in Microsoft Word Home toolbar; if you do not have it, please read [this section of Altus docs](https://docs.altus.pro/solutions/AltusForWord/Help.html#adding-the-altus-for-word-add-in-to-word).

How to proceed next:

1. Connect the Word document to Altus. To learn how to get started with connecting this document to an Altus Project please read [this section of Altus docs](https://docs.altus.pro/solutions/AltusForWord/Help.html#adding-the-altus-for-word-add-in-to-word).
2. Edit the Word document to add text and data from Altus. To learn how to add fields from your Altus record to this document please read this [section of Altus docs](https://docs.altus.pro/solutions/AltusForWord/Help.html#inserting-project-data-into-your-word-document).

Business Case

The Business Case provides the justification for undertaking the project based on its estimated cost, delivery timeline and the benefits it will deliver.

|  |  |
| --- | --- |
| Project Name: | Name |
| Project Sponsor: | Sponsor |
| Business Case Manager: | Project Manager |
| Version: |  |
| Issue Date: |  |
| Author: |  |

Reviewed By

|  |  |  |
| --- | --- | --- |
| Reviewer Name | Role | Date |
|  |  |  |
|  |  |  |

Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Author | Revision Details |
|  |  |  |  |
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Document Approval

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| --- | --- | --- |
| Approver Name | Approver Title/Role | |
| [Name] | [Role] | |
| **Signature:** | | **Date:** |

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# Executive Summary

## Background

Description

## Recommendation

Outline the recommended approach which is detailed in the following sections:

# Business Problem/Opportunity

## Problem Statement

Problem Statement

## Current Situation

Outline how the current business as usual process operates, or the existing problem which this project will solve.

## Impact of Inaction

Outline how doing nothing will impact the organisation.

# Proposed Solution

## Recommended Option

From the solution options outlined in the previous section, present the recommended option which this project will proceed with. The analysis should prove that this is the strongest option with the most benefit for the business.

## Business Benefits

The following benefits have been identified:

Business Benefits

### Key Benefits

The following benefits are going to be provided as part of this project:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Goal | Department | Start |
|  |  |  |  |  |

## Key Goals

Please enter the Key Goals this solution contributes to.

### Evaluation Criteria

Please enter the Evaluation Criteria that are relevant to this solution and their scoring for each.

## Deliverables

The following deliverables are part of this project:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ID | Name | Description | Due Date | Status Reason |
|  |  |  |  |  |

## 

## Risks

The following are risks involved in carrying out the project:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ID | Name | Description | Risk Score | Mitigation Plan | Contingency Plan | Due Date |
|  |  |  |  |  |  |  |

# 

## Estimated Timeframe

Give an estimate for how long the project will take to complete. Also list the estimated completion dates for any key milestones.

|  |  |
| --- | --- |
| Project Start | Start Date |
| Project Finish | Finish Date |

The following tasks have been identified for the project:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Start | Finish | Effort (Hours) | Duration (Days) | Milestone |
|  |  |  |  |  |  |

## Cost & Resourcing Needs

### Financial Assumptions

Explicitly state any assumptions made while analysing the costs for the solution. These should include any estimates made.

### Cost Summary

Summarise the costs involved with doing this project.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Year 1 | Year 2 | Year 3 | Year 4 | Total |
| CAPEX |  |  |  |  |  |
| OPEX |  |  |  |  |  |
| **Total** |  |  |  |  |  |

### Budget Required

Provide the best estimate for the total budget required to complete the project.

|  |  |
| --- | --- |
| Total Forecast Cost | Financials: Total Forecast |

### Resourcing Needs

The following Resources will be needed to complete this project:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Start | Finish | Total Hours Proposed | Total Hours Committed |
| Resource Name/Generic Resource | First date requested | Last date requested | Total Hours Proposed | Total Hours Committed |
|  |  |  |  |  |

# Appendix

Add any additional and supporting documentation.