

iCoTech Services

9 STEP GUIDE TO BUILDING A BUSINESS CASE FOR PPM SOLUTIONS

A well-crafted business case positions you as a strategic thinker and helps leaders prioritise projects effectively. It should balance rational arguments with compelling benefits, ensuring informed decision-making regarding planning, budgets, and resource management.

Your business case should clearly outline the expected return on investment (ROI), budget requirements, project timeline, scope, risks, and approach. Engaging stakeholders early in the process will strengthen your case, increase support, and highlight the benefits of the proposed solution.

This guide walks you through nine key steps to writing a persuasive business case, providing structured activities to help you refine your proposal.

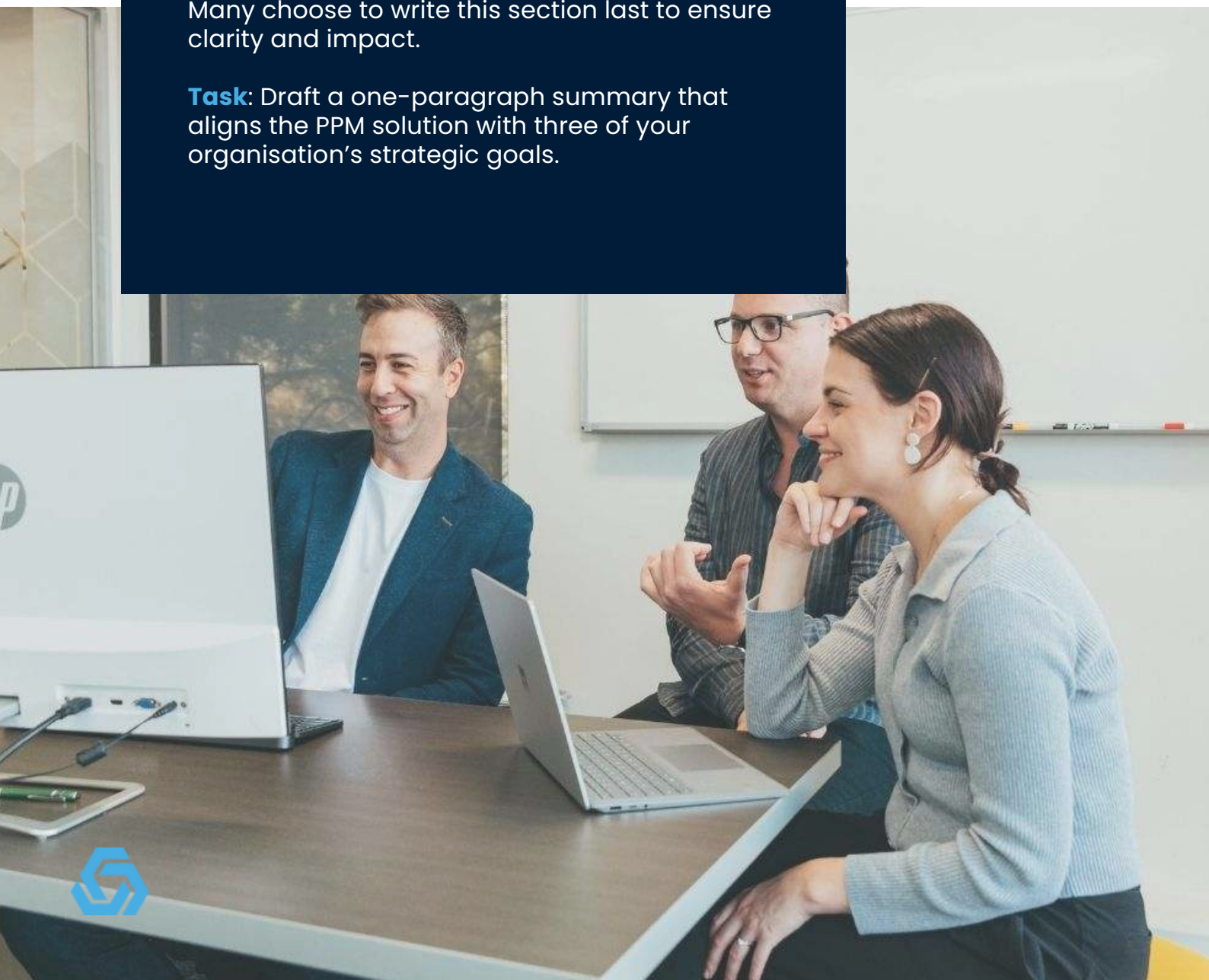
STEP 1: EXECUTIVE SUMMARY

Summarise the key points of your business case, ensuring it is concise and directly linked to your organisation's strategic goals.

This section should highlight the benefits of implementing a PPM solution and why it is the right choice.

Many choose to write this section last to ensure clarity and impact.

Task: Draft a one-paragraph summary that aligns the PPM solution with three of your organisation's strategic goals.



STEP 2: FINANICAL STATEMENT



Provide a detailed breakdown of the total costs, including licensing fees, training expenses, and implementation costs. Anticipate potential questions from stakeholders and justify whether an external solution is more cost-effective than an in-house build.

Task: Create a cost comparison table for three vendors, including short-term and long-term financial benefits.

ROI ANALYSIS

Calculate expected ROI using this formula: ROI (%) = [(Net Benefit) / (Cost)] x 100

Benefit	Description	Value
Time Saving	*Automating manual reporting saves 20 hours per week.*	*Example: £15K/year*

STEP 3: PROJECT DEFINITION

- **Define the Problem**: Use stakeholder input and data to describe the key challenges the PPM solution will address. Focus on how inefficiencies, lack of visibility, or poor resource management impact the business.
- **Set Objectives**: Define clear, SMART (specific, measurable, achievable, relevant, time-bound) objectives aligned with strategic goals.
- **Highlight Benefits**: Explain how the solution will improve efficiency, visibility, and project success rates.
- **Establish Success Metrics**: Identify measurable KPIs such as increased project completion rates, reduced risk, and improved resource allocation.



STEP 4: DELIVERABLES

Outline how the PPM solution will be introduced across the organisation. Specify whether it will be rolled out in phases or launched organisation-wide, and describe the training plans to support adoption.

Task: Develop a high-level implementation plan with key milestones and expected outcomes.

STEP 5: RESOURCES & INTERDEPENDENCIES

Identify the resources required, including personnel, tools, and dependencies on other business functions. Address potential stakeholder concerns and ensure alignment with existing systems.

Task: List key stakeholders and document how their roles will be affected. Be sure to address to any anticipated concerns with actions.

Stakeholder	Impact	Action

STEP 6: OPERATIONAL IMPACT



Explain how the introduction of a PPM solution will affect daily operations. Be transparent about potential disruptions while emphasising the long-term benefits such as improved workflow efficiency and better collaboration.

Task: Draft a brief communication plan for different departments, explaining the impact and benefits of the PPM solution.

STEP 7: SCOPE & TIMELINE

Clearly define the project scope and outline key phases and milestones. Keep this section concise, as it will serve as a reference point during project execution.

Task: Create a simple project roadmap or Gantt chart, showing major phases and deliverables.

STEP 8: RISKS

Identify potential risks associated with implementing a PPM solution and outline mitigation strategies. Present risks in a way that reassures stakeholders that they can be managed effectively.

Task: List three possible risks and propose a mitigation plan for each.

Risk	Likelihood	Mitigation Plan
Low adoption rates	*Medium*	*Tailored training and onboarding*





STEP 9: PROJECT APPROACH

Define the project's governance structure, detailing roles, responsibilities, and reporting mechanisms. Clarify who will oversee implementation and how progress will be communicated to stakeholders.

Create a RACI (Responsible, Accountable, Consulted, Informed) chart mapping out key project roles.

Task	Role	Role	Role