The Detailed Business Case (for **D**ecision **G**ate **2**) provides sufficient detail of the proposed project to support its consideration, selection, funding, and prioritisation within the portfolio of business change projects. It must be presented for sign-off to the Program Steering Committee (PgSC).

It defines the rationale and approach for the project and describes the end-to end story of the initiative. In other words, from the beginning (what problem or situation triggered the change initiative) to end (what benefit, value or return is expected).

This template is completed for each proposed initiative, signed by the relevant Business Unit Manager, and reviewed by the Project Office prior to submission to the PgSC.

Complete the following sections based on the initial need and understanding as defined on the **Project Concept** (**D**ecision **G**ate **0**) and the **Feasibility and Option Analysis** (**D**ecision **G**ate **1**); these documents must have been approved by the PgSC prior to submission of this Business Case.

Emphasis should be placed on why the PgSC should fund and accept the proposed project in prioritisation with others.

|  |  |
| --- | --- |
| **Project Name:** | **Project Number:** |
| **Executive Summary:****(***A concise summary of the project*.)This includes information on:* what the project aims to do
* key financial and other benefits including payback period or Return on Investment (ROI)
* funding and resources required
* links between the proposed project and existing business priorities.
* in some cases it may be appropriate to mention potential project risks and how they will be managed - for example, if people considering the proposal have a particular concern.
* Briefly describe the process followed in developing the Business Case and mention the name and title of anyone who had input. For example, it might have been developed with the assistance of external expertise or key internal stakeholders, such as the CIO or Chief Financial Officer. If the project has been reviewed progressively at management level, then it will be useful to mention this as well. This information will show that the project has internal support and give the PgSC more confidence in the proposal.
 |
| **Introduction/Background:** (*Based on the approval by the PgSC in the Project Concept application* ***DG0***).Describe the business problem or opportunity that this project will address. |
| **Objectives:** (*Based on the approval by the PgSC in the Project Concept application* ***DG0****).*Describe the objectives or requirements for the project, which if met, will result in the problem being solved or the opportunity being realised. Cut and paste from DG0. |
| **Strategic Alignment:**Describe how this project will contribute to or enable achievement of the business's Strategic Plan. |
| **Scope:**Outline the functions, processes, systems and Business Units considered in and out of scope. |
| **In Scope** | **Out of Scope** |
| **Constraints:**Describe any factors that limit the way in which the objective can be achieved. This includes restrictions on budget, timing, any mandatory (regulatory or compliance milestones), manpower limitations, skills availability, etc. |
| **Interdependencies:**Outline all projects and other initiatives which have a bearing, or are in some way dependent on this project. |
| **Benefits:**The benefits that the project will deliver expressed in measurable terms against the situation as it existed prior to the project. Benefits should be both qualitative and quantitative. They should be aligned to corporate and program benefits. Any benefits realisation requirements should be stated. Any perceived or actual dis-benefits should also be captured.  |
| Category | Benefit/Dis-benefit | Measure  | Baseline Value | Target Value |
|  | *The planned benefit or detriment.* | *How is the benefit measured? Specify tangible or intangible.* | *The baseline performance prior to the project.* | *The level of performance planned.* |
| Financial |  |  |  |  |
| Non-Financial(e.g. Process, Customer, People) |  |  |  |  |
| **Costs:** A summary of the project costs, the ongoing operations and maintenance costs and their funding arrangements. The Cost Benefit Analysis compares the aggregated benefits and dis-benefits to the project costs and ongoing incremental operations and maintenance costs. The analysis may use techniques such as cash flow statement, ROI, net present value, internal rate of return and payback period.* Business Costs
* Technology Costs
* Other Costs
* Cost Benefit Analysis
 |
| **Options:**Refer to approved Option Evaluation Report DG1 for options summary. |
| **Organisational Impact:**Describe how the proposed project will modify or affect the organisational processes, products, services/customer interactions, tools, hardware and/or software. It should also explain any new roles which would be created or how existing roles may change. |
| **Schedule:**Include the period over which the project will run and the period over which the benefits will be realised. Include an initial project plan which contains a list of the key project milestones, their target completion dates, and the position responsible for delivery, ie a resource allocation. |
| **Governance:***(Given the importance of sound governance to subsequent implementation success, it is an important consideration for the* PgSC *when considering the project.)*Provide information on proposed governance arrangements using the standard organisational project governance framework. This must cover issues such as the arrangements for:* oversight and control of the project - using a Project Control Group
* the day-to-day management of the project
* reporting to the decision maker(s) on progress, problems (escalations), and review points
* a Project Structure diagram using the standard roles and responsibilities defined by the organisation
 |
| **Risks:**A summary of the key risks together with the likely impact and mitigation plans should the risk eventuate. Complete the Business Case Risk Assessment document and attach it to this Business Case as an appendix. |
| **BUSINESS UNIT APPROVAL** |
| **Business Unit Manager(s):** |
| **Project Office:** |
| **PROGRAM STEERING COMMITTEE APPROVAL** |
| (Meeting Date) (Caveats) (Funding allocation to delivery) |

**Note:** Business cases can be varied for the needs of the project and the enterprise. Thought should be given to recording the business case in a project tracking system. All Decision Gate documents build on each other, so an electronic recording system would provide ease of tracking and management. The project reporting tool should include financial reporting and well as scheduling and resourcing.

