



Business Case Brief

Sample deliverable. Client names and identifying details are anonymized to respect client privacy.

Client type
Mid market SaaS
company

Country
United States

Deliverable
Business Case

Client Situation

The company had an onboarding workflow dependent on manual handoffs and inconsistent client information. Leadership needed a practical case for change before approving delivery spend.

Client Request

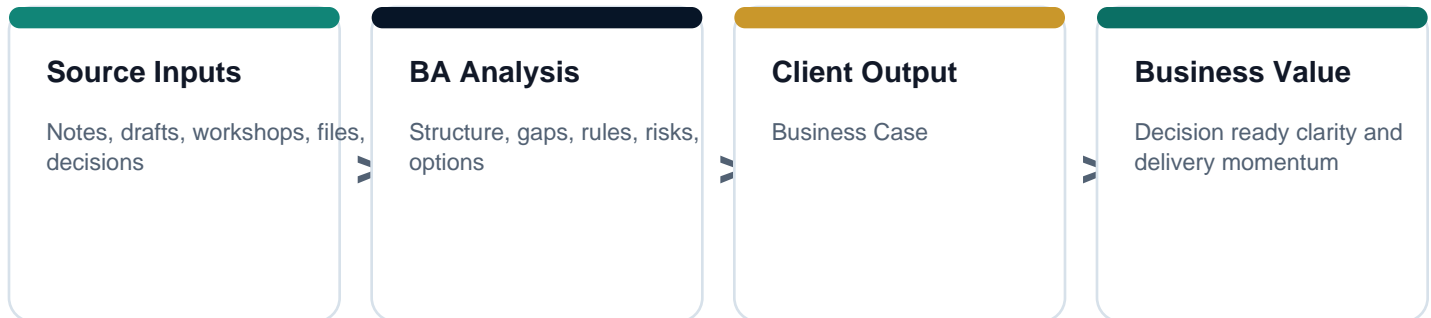
Prepare a concise business case with problem statement, options, benefits, risks, and recommendation.

Value Created

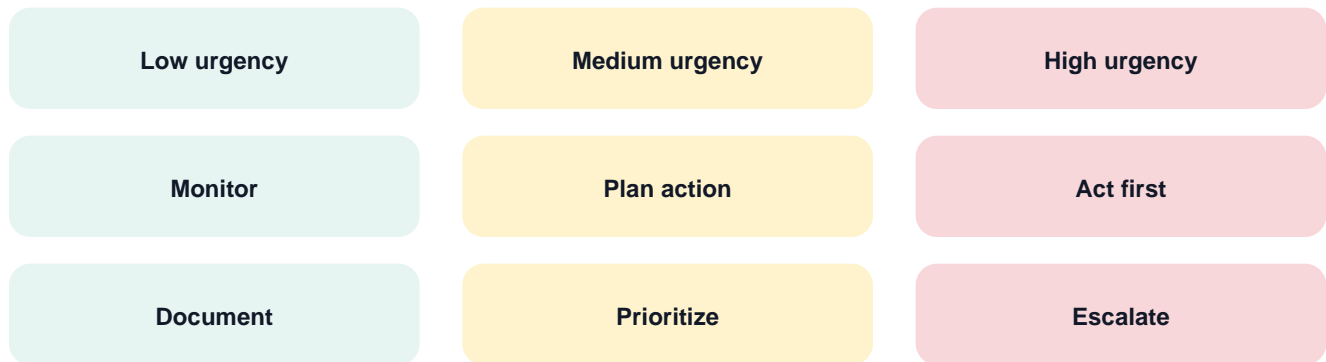
The client could make an informed investment decision without waiting for a long consulting engagement.



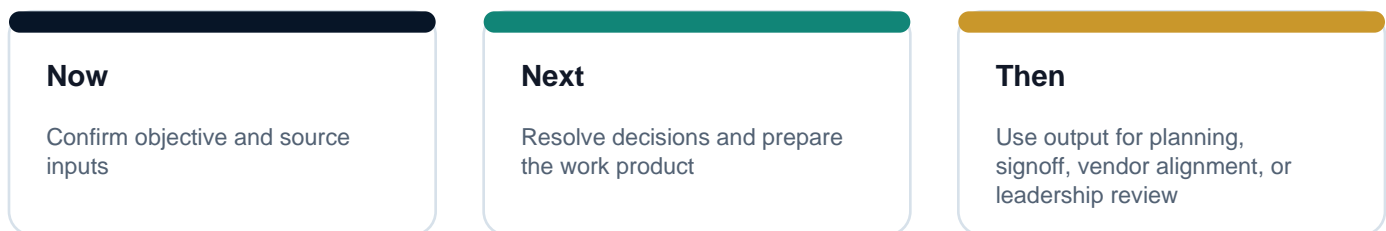
How The Work Creates Value



Risk And Decision Heat Map



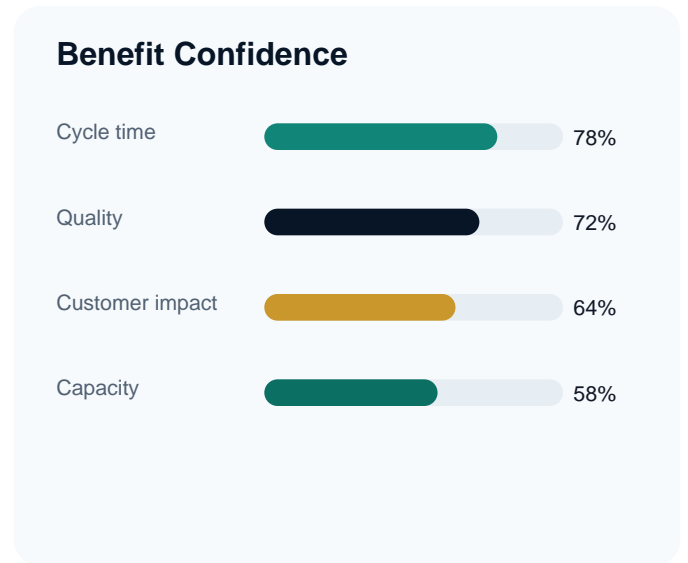
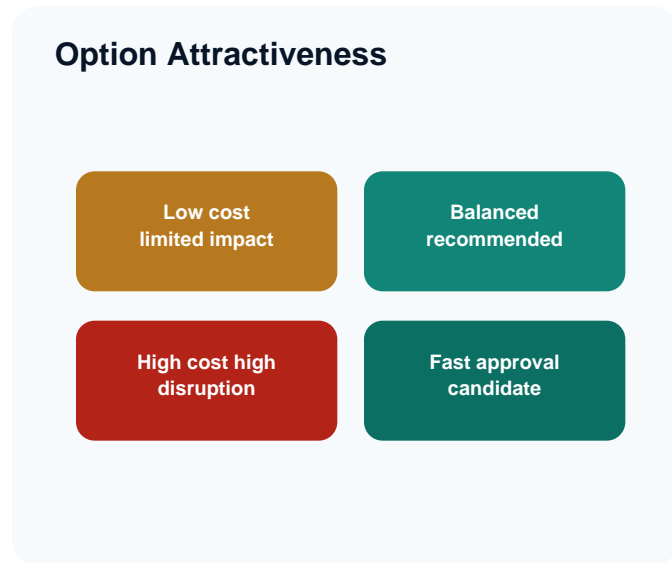
Work Sequence





Visual Work Product Snapshot

This page adds a visual layer to the analysis so the client can quickly understand patterns, priority, and delivery flow.





What The Client Receives

Deliverable Component	Purpose	Client Value
Problem statement	Business issue and measurable pain.	Shared executive understanding.
Options analysis	Comparison of practical paths forward.	Faster decision.
Benefit summary	Operational and customer impact.	Investment rationale.
Recommendation	Clear path with assumptions.	Actionable approval request.

Quality Standard

Each work product is reviewed for business clarity, decision usefulness, delivery readiness, and traceability to source input. The goal is not to create more documentation. The goal is to create material that helps the client make decisions and move work forward.



Options Analysis

Option	Description	Benefits	Risks
A	Clean up existing workflow and templates.	Fast, low cost.	Limited long term improvement.
B	Standardize intake, handoffs, and approval checkpoints.	Balanced effort and high impact.	Requires owner alignment.
C	Replace the full onboarding platform.	Long term scalability.	Higher cost and disruption.



Benefits And Measures

Benefit Area	Expected Impact	How To Measure	Owner
Cycle time	Fewer handoff delays.	Average days from intake to launch.	Operations
Quality	More complete client information.	Rework caused by missing data.	Delivery lead
Customer experience	Clearer onboarding status.	Client onboarding feedback.	Customer success



Client Handoff Notes

Handoff Area	What The Client Receives
Decision support	A clear view of what has been confirmed, what remains open, and which decisions are needed.
Delivery support	Structured material that can be used by product owners, project managers, vendors, analysts, and testers.
Leadership support	A concise summary suitable for briefing sponsors, executives, or steering committee members.
Traceability support	A practical link between the client ask, the source issue, the analysis performed, and the recommended next step.

Action Register

Action	Why It Matters	Timing
Confirm decision owners	Prevents unresolved questions from blocking delivery.	Before next planning session
Review open questions	Separates true gaps from items already known by the business.	Within 5 business days
Approve priority items	Gives the delivery team clear sequencing.	Before work begins
Store final package	Maintains a single source of truth.	After approval