

# Using a business case to get what you want

**By Lesley Robinson**

Good business decisions do not happen by accident. They rely on appropriate levels of research and analysis. A business case enables a decision maker to analyse a business situation in a thorough and concise manner, with the objective of making an accurate decision. Accurate decisions limit risk while increasing chances for success.

This article will discuss the value of making a business case to ensure that your ideas, projects, service development and resource needs get accepted by those who matter. The business case's true power is its flexibility as a dynamic, real-time decision making tool which can be continuously applied to any business decision situation. It allows all unforeseen opportunities to be exploited or addressed as they arise.

## **The value of making a business case**

When talking about making a business case, there is often confusion between making a case and writing a business plan. They are quite different tools. A business plan is a long-range projection of an entire business and enables overall strategic planning. However business plans become dated quickly as situations constantly change and they are of little use for running the business on a day-to-day basis. A plan is essential but it cannot address the constant barrage of decisions and changing situations.

A business case however, is a tool used for making business decisions on a daily basis. These are often decisions involving pricing, capital investment, product development, implementation of projects, contracts etc. Writing a business case should not be done in isolation and a wide range of people should be consulted, such as your peers in other departments as well as more senior colleagues. This means that the case can be widely reviewed and its assumptions discussed and it allows time to persuade the right people about the benefits of your approach. The wider you consult, the wider the ownership of your case.

The business case will allow you to establish stronger credibility with key decision makers as it is the tool generally used by senior executives as a recognised way of presenting business ideas. A well thought out case will win hearts and minds over and above rushed business arguments where the numbers can easily be discredited or your whole premise offers little organisational value.

## **Write a story**

It can make it easier to write if you view your business case as a compelling non-fiction short story. Write it with focus, brevity and clarity and tell it in as few pages as possible. Use the Executive Summary well. This is the first section of the case which sums up the key arguments, evidence and recommendations. It should ideally be about two pages long, with four as a maximum. Some people will never get past reading this section of the case and may not have time to delve into the detail, so you need to capture their imagination with this important summary of your arguments. To keep the story flowing, most of the data analysis in your case should be put into an appendix. The core text should only contain your well-structured story and keep the reader enthralled.

Your business case should also focus on one central idea or topic. Make it a story with one central character. It is easy to get carried away and introduce more than one idea into your plan but keeping it simple and based around a single idea will strengthen the chances of your case being heard and accepted. Don't leave people distracted by sub-plots and distracting characters that don't really matter.

## Three perspectives

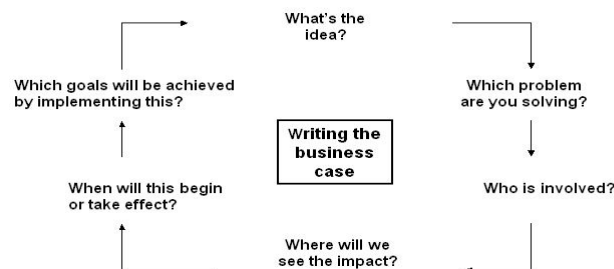
Although you might think that the case you are writing is foolproof, you really must know whom you are writing the case for. Is it your boss who knows you well? Is it the Finance Director who will clearly be focusing on the numbers or is it the CEO who will want to know what impact this will make on the business? Your story will need tailoring depending on your immediate audience.

Your story also needs to be considered from three perspectives: your own, your team's and the organisation's. It is easy to write a plan for something that *you* want, but it must consider the impact it will have on your team. Will it change how they work? Will the type of work they do change? Could it involve extra training? You also need to consider how it will help the organisation achieve its goals and objectives. This broader consideration from different perspectives will make your business case much more robust.

You will also need to make sure you have asked yourself all the difficult "What if...?" questions which will inevitably be asked by the decision makers. "What if the costs in my plan are wrong by 20%?" "What if the timescale for the project is protracted for a further 6 months?" "What if I don't get what I need?". You need to consider the different scenarios of what could happen and what your response will be to each of them. You must fully understand what you ultimately want to achieve and ensure that all your arguments drive towards this goal.

## 6 W's model

For any type of business case you are writing, the following model can be used. These are the core 6 questions you should be asking yourself as you construct your business case. Your case must be addressing a departmental or organisational need or issue, which when it is solved with the right resources, time and people involved, will drive forwards an operational goal. If it cannot achieve this, it is likely to be rejected.



## Conclusion

Underlying any business case should be the knowledge of your own cost base and the skills of your team or the colleagues you want to involve. You must know the numbers inside out, the time and people inputs you need and the clear benefits your idea will bring to the organisation. With all of this in place, who could say *no* to you?