



Building a Business Case Course Outline

Course Overview

You've developed a great idea that will help your organization and your group achieve its objectives, but how will you get the buy-in you need to get the idea approved? Building a strong business case that clearly shows your idea's value is not always easy. Perhaps you don't know what type of data your stakeholders will trust, or maybe you are intimidated by number crunching. This course gives you the guidance and the tools to make a strong case. **The class is very hands on:** participants engage in numerous exercises developing and presenting a business case. Topics include:

- Specify the business need for your idea
- Align your case with strategic goals
- Build the right team to shape and test your idea
- Calculate the return on investment
- Analyze risks and opportunities
- Present your case to stakeholders

Course Details

Class Duration	2 days (14 contact hours)
Course Materials Provided	Student manual and electronic files
Course Price	\$995 per participant. Special group pricing available.

Prerequisites

A basic familiarity with the subject matter is helpful, but not required.

Instructor and Courseware Designer

Brian Salk, PhD, PMP®, PMI-ACP®, has over 30 years of experience, specializing in hands-on traditional and agile project management, leadership, training, and consulting. He manages a variety of consulting and training programs and projects for his organization and for a number of Fortune 500 customers. His global clientele includes organizations in North America, South America, Europe, and the Middle East. In addition to authoring hundreds of training courses, Dr. Brian frequently delivers leadership training, management training, project-management certification training (e.g., PMP®) project-management best practices training, and a wide variety of business skills training. He is a four-time winner of the prestigious Worldwide Excellence in Training award from a global training organization, recognizing the 25 highest-rated instructors from a network of over 2,400. Dr. Brian earned his PhD from Fielding Graduate University in the field of Human and Organizational Systems, with a focus on effective methodologies related to project management education, and his Masters of Arts (Education) from the University of Michigan

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Lesson 1: Preparation

- Basics of Business Cases
- Learn How Your Organizations Evaluates Business Cases
- Organizational and Goals, Strategy, Portfolio, Program, Project, and Operations Management
- Market Analysis: Understanding Factors That Necessitate Change (e.g., Changing Customers, Suppliers, Regulations)
- Perform a SWOT Analysis, Including Organization Environmental Factors
- Gap Analysis: Clarify As-Is and To-Be States
- Project Selection Criteria, Success Metrics, and Operational Goals
- Case Study Selection
- Create a Benefits Measurement Plan
- Considering Business Case Constraints
- Evaluating Different and Competing Solutions

Lesson 2: Get to Know Your Audience

- Perform a Stakeholder Analysis
 - Stakeholder Power: Informational, Expert, Organizational, Reward, Penalty, Others
 - Stakeholder Interest
 - Stakeholder Involvement
- Understand Your Audience's Objectives
- Create a Stakeholder Register
- Create a Stakeholder Engagement Assessment

Lesson 3: Build the Case

- Clarify the Need
- Build a Cross-Functional Team
- Consider Alternatives
- Think Through the "How" at a High Level
- Develop Project Charter

Lesson 4: Crunch the Numbers

- Estimate Costs
 - Project Costs
 - Operational Costs
- Calculate Benefits
 - ROI
 - Benefit-Cost Ratio
 - Payback Period
 - Time Value of Money: IRR and NPV
 - Softer Business Drivers: Customer Satisfaction, Employee Satisfaction, Employee Turnover, Security Breaches, etc.
- Account for Risks

Lesson 5: Present Your Case and Move Forward

- Prepare Your Documents
 - Vision Statements
 - Elevator Speech
 - Project Charter
- Shop Your Case Around
- Prepare to Present
- Create a Business Case Presentation
- Make Your Pitch
- Get to a Decision
- What Next?

Lesson 6: Avoid Common Mistakes

- Not Addressing Common Goals
- Ignoring Other Perspectives
- Neglecting Transition Costs
- Poor Risk Management
- Excessive Jargon