**[A blue and white sign

AI-generated content may be incorrect.](https://www.smartsheet.com/try-it?trp=12401&utm_source=template-word&utm_medium=content&utm_campaign=SEO)Simple Business Case Template**

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| --- | --- |
| Date | MM/DD/YY |
| Submitted By | Name |
| Title / Role | Role |

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| 1. Project Overview | |  |
| Briefly describe the problem this project aims to solve or the opportunity it aims to address. | |  |
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| 2. Background / Current Situation | |  |
| Summarize the current context or environment related to the problem or opportunity. | |  |
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| 3. Proposed Solution | |  |
| Outline the recommended solution, including a summary of what it will do and how it addresses the problem. | | |
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| 4. Technical Requirements and Integration |  |
| List any major system requirements, platforms, or tools involved. Note any dependencies or integration points with existing infrastructure. | |
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| 5. Security and Compliance Considerations | |  |
| Note any security, privacy, or compliance implications, including data handling, user access, or regulatory needs. | | |
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| 6. Implementation Plan | |  |
| List key steps and phases of the rollout, including timelines, responsible teams, and any needed resources. | | |
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| 7. Cost Estimate (CAPEX / OPEX) | |  |
| Provide a rough breakdown of capital expenditures (CapEx) and operating expenses (OpEx), if applicable. Include any ongoing support costs. | | |
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| 8. Benefits / Impacts on Users | |  |
| Describe the anticipated benefits to the organization or end users - efficiency, productivity, satisfaction, revenue, etc. | | |
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| 9. Performance Metrics | |  |
| List how success will be measured. Include key performance indicators (KPIs), benchmarks, or usage targets. | | |
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| 10. Risks and Limitations | |  |
| Outline what might affect success—such as budget constraints, dependencies, skill gaps, or external factors. | | |
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