**[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)HR Business Case Template**

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| 1. **Executive Summary**   Provide a high-level overview of the proposed HR initiative, including the business goal it supports, the recommended solution, projected benefits, estimated cost, and a clear call to action (e.g., funding approval, leadership buy-in). This summary should engage both financial and executive stakeholders and be digestible in under a page. |
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| 1. **Current HR State / Context**   Describe the existing HR environment, systems, processes, and workforce challenges. Include:   * Turnover rates, hiring delays, absenteeism trends, or engagement scores * Current tools (e.g., manual onboarding, outdated HRIS) and inefficiencies * Quotes from recent employee surveys or exit interviews that illustrate pain points * Risks of doing nothing: e.g., talent loss, compliance gaps, stagnating culture |
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| 1. **Business Need or Opportunity**   Clearly articulate the strategic need or opportunity. Link to broader corporate goals, such as:  Retaining top talent; improving onboarding or performance management; achieving DE&I or ESG commitments; and preparing for growth, restructuring, or digital transformation. Include internal data (survey results, HR dashboards) and external benchmarks to strengthen the case. |
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| 1. **Proposed HR Initiative**   Describe the initiative in practical terms:   * What it is (e.g., wellness program, ATS implementation, leadership pipeline strategy) * Who it affects (e.g., all employees, new hires, frontline managers) * How it works—include tech components, delivery method, or program structure   Highlight any expected employee or cultural impacts. Call out innovation (AI-driven tools, inclusive practices, remote-first design, etc.). |
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| 1. **Strategic Alignment**   Show how this initiative ladders up to business and HR priorities. Include how it supports goals like growth, retention, compliance, productivity, or morale; advances strategic HR pillars: employer branding, workforce flexibility, skill building, or succession; and aligns with frameworks like DE&I, Wellbeing, Digital HR, or Employee Experience. Use the organization’s actual HR strategic roadmap, if available, to link this project with existing efforts. |
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| 1. **Alternatives Considered**   Present a comparative evaluation:   * Option A: Do nothing (status quo)—include cost of inaction * Option B: Alternative vendors, internal solutions, or phased rollout   Include pros and cons of each, including cost, scalability, user adoption, and alignment with org needs. Describe why this initiative is the most feasible and strategically sound. |
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| 1. **Cost-Benefit Analysis / Financial Justification**   Provide a detailed breakdown of costs and returns. Use charts or tables – finance teams expect clear visualization. Where possible, include hard numbers and industry benchmarks:   * One-time costs: software, consulting, training, materials * Ongoing costs: subscriptions, vendor support, internal staffing: * Savings or benefits: reduced attrition, faster onboarding, fewer compliance violations * Estimated ROI, payback period, TCO (total cost of ownership) |
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| 1. **Risks and Mitigation Strategies**   Address both human and technical risks, including employee resistance, change fatigue, lack of management buy-in, delays in integration or vendor delivery, and data privacy or compliance concerns. For each, describe mitigation related to communication plans and leadership alignment, pilot testing or phased rollout, and upskilling or enablement plans for managers and HR partners. |
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| 1. **Implementation Plan and Timeline**   Break the project into clear phases with timing. Assign ownership to roles (e.g., HRBP, IT, Comms, vendor project manager):   * Planning and stakeholder engagement * System configuration or program design * Testing or pilot * Go-live and internal launch * Post-launch evaluation and optimization |
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| 1. **Success Metrics / KPIs**   Define how the impact will be measured. These KPIs should be tied directly to the business outcomes stated earlier.   * Quantitative: retention rate change, time-to-fill, onboarding NPS, reduction in overtime or absenteeism * Qualitative: engagement survey uplift, leadership feedback, employee participation rates * Digital KPIs: logins, completion rates, self-service adoption * Include baseline and target metrics where possible |
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| 1. **Stakeholders and Governance Structure**   Outline decision-makers and champions, including executive sponsors (CHRO, COO, CEO), project steering committee (cross-functional if relevant), change agents or HR champions in each department, and communication and feedback channels with employees (e.g., town halls, listening tours). Stakeholder alignment is crucial to early buy-in and sustained momentum. |
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| 1. **Next Steps and Call to Action**   Conclude with what you need from the reader:   * Approval of budget, headcount, or vendor selection * A decision deadline (e.g., to meet fiscal planning or contract window) * Immediate actions: kickoff meeting, scope finalization, pilot cohort definition |
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