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

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| 1. **Problem/Opportunity**   *Briefly define the key challenge, gap, or growth opportunity. Focus on urgency, relevance, or business impact in 1–2 sentences.* |  | |
| 1. **Proposed Solution**   *Describe the recommended solution or initiative. Keep it concise: What is it, and how does it directly address the problem?* |  | |
| 1. **Target Outcomes/Benefits**   *List the top 2–3 expected gains (financial, operational, environmental, etc.). Quantify if possible (e.g., “reduce processing time by 30%”).* |  | |
| 1. **Implementation Overview**   *Summarize how this will be executed:*   * *Major phases or components* * *Key teams or vendors involved* * *Deployment approach (phased rollout, pilot first)* |  | |
| 1. **Timeline and Milestones**   *Provide 3–5 high-level checkpoints or events with estimated dates:* | **Milestone** | **Target Date** |
| Finalize requirements | Q1 20XX |
| Complete vendor selection | Q2 20XX |
| Launch pilot (2 markets) | Q3 20XX |
| Complete full implementation | Q4 20XX |
| Conduct post-launch performance review. | Q1 20XX |
| 1. **Cost Snapshot (CapEx/OpEx)**   *Outline expected capital and operating expenses.* | CapEx: $0 for build-out/hardware/development | OpEx: $0/year for support, licensing, or ops  Include funding source if known (e.g., internal, grant, partnership) |
| 1. **Key Risks and Mitigation**   *Call out 1–2 top risks and how you will manage them (e.g., risk of regulatory delay → early engagement with local agencies).* | Risks | Mitigation |
| 1. **Recommendation/Ask**   *Be clear and direct: What are you asking decision-makers to approve or fund? Include timing (e.g., approval by the end of Q2 20xx to maintain the launch schedule).* |  | |

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