**[](https://www.smartsheet.com/try-it?trp=12401&utm_source=template-word&utm_medium=content&utm_campaign=SEO)Small Business Case Template Example**

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| --- | --- | --- |
| Company Name | Positive Charge |  |
| Date | MM/DD/20XX |  |
|  |  |  |
| **1. Business Description** | |  |
| *Briefly describe your business, core offering, and who you serve. Include size, location, and mission if relevant.* | | |
| Positive Charge is a regional EV-charging and logistics company operating across Oregon and Washington. We provide public and fleet charging infrastructure, along with route optimization tools for electric delivery services. Our mission is to accelerate equitable EV adoption in underserved communities. | | |
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| **2. Current Challenge or Opportunity** | |  |
| *What pressing issue or opportunity is the business facing? Be concise—focus on what's at stake and why now.* | | |
| Our urban charging stations are near capacity during peak hours, while rural chargers remain underutilized. This imbalance leads to customer frustration, delivery delays, and missed revenue potential. | | |
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| **3. Solution Overview** |  |  |
| *What are you proposing? Summarize the project, purchase, initiative, or change you want to implement.* | | |
| We propose deploying a smart load-balancing system that dynamically redirects EV drivers to nearby stations based on real-time demand and projected fleet usage. This project includes signage upgrades, mobile app integration, and localized marketing to encourage adoption. | | |
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| **4. Financial Overview** |  |  |
| *Provide high-level cost and revenue projections.* | | |
| **Estimated Total Cost** | **Expected Revenue or Savings** | **Break-Even or Payback Period** |
| $ 185,000.00 | $290,000.00 | 9 months |
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| **5. Resources Needed** |  |  |
| *List the resources required (people, materials, tools, outside vendors, etc.). Note availability or gaps.* | | |
| Internal: Dev team, station maintenance crew, fleet ops manager  External: Software vendor (for demand-routing API), graphic designer (for signage), marketing partner  Equipment: New digital signage, minor hardware retrofits | | |
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| **6. Implementation Plan** | |  |
| *Outline the steps and timeline to roll out the solution. Use 3–5 key phases or milestones.* | | |
| **Phase** | **Description** | **Target Date** |
| Planning | Finalize vendor, define system requirements | MM/DD/YY |
| Installation | Deploy signage and backend integration | MM/DD/YY |
| Go-Live and Promotion | System goes live with regional promo campaign | MM/DD/YY |
| Performance Review | Analyze impact, adjust routing logic as needed | MM/DD/YY |
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| **7. Success Metrics** |  |  |
| *Define how you’ll measure success (sales growth, foot traffic, customer satisfaction, etc.). Include 2–3 clear metrics with targets.* | | |
| 20% increase in utilization of underused chargers within 6 months  10% drop in peak congestion complaints  15% increase in app check-ins at redirected stations | | |

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| **8. Local / Regional Market Fit** | |  |
| *Explain how this proposal fits your local or regional customer base, trends, or competitive environment. Why does it make sense here?* | | |
| This initiative is ideal for our service region, where driver range anxiety and charger crowding are persistent issues. Local EV adoption rates are climbing, but infrastructure needs to scale with demand. Our fleet partners have requested solutions that reduce wasted idle time and charge uncertainty. | | |

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