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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)Technology Business Case Template**

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| 1. Executive Summary   Offer a high-level summary of the proposed technology initiative, its purpose, anticipated impact, estimated costs, and recommendations. This section should capture leadership attention in one page or less. |
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| 1. Current State / Environment   Describe the current technology, infrastructure, or operational context. Include: existing tools, systems, or workflows in use; known limitations or inefficiencies; lifecycle status (e.g., aging equipment, outdated platforms); and current costs (financial, labor, productivity) |
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| 1. Business Need or Opportunity   Clearly explain the challenge, risk, or opportunity that the proposed technology addresses. Examples include outdated legacy equipment hindering performance; new regulatory standards requiring technical upgrades; market demand for product innovation; and operational bottlenecks or excessive downtime. |
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| 1. Proposed Technology Solution   Detail the recommended solution, including what the technology is (e.g., a system, platform, device, infrastructure); how it works and what it will do; vendor/product info, if applicable; and scope of implementation (which teams, sites, or processes). |
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| 1. Strategic Alignment   Explain how this project supports organizational goals. Examples include: improving safety, speed, quality, or output; aligning with sustainability or innovation goals; enabling new revenue or market expansion; or supporting digital transformation or operational excellence. |
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| 1. Alternatives Considered   List other technologies or methods evaluated (including doing nothing), and why they were not chosen. For each, include a brief description, pros and cons, and reasons for rejection. |
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| 1. Cost-Benefit Analysis   Provide detailed cost estimates and projected returns for the following. Include tables, charts, or scenarios, if needed:   * Capital expenditures (hardware, installation, development) * Operating costs (maintenance, support, licensing) * Potential cost savings (labor, energy, rework, downtime) * Forecasted ROI, payback period, TCO (Total Cost of Ownership) |
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| 1. Risks and Mitigation   Identify risks related to: technical integration or system compatibility; physical infrastructure or site constraints; safety or regulatory compliance; and vendor performance or supply chain issues. Provide strategies to mitigate each risk. |
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| 1. Technical and Operational Requirements   List requirements for successful implementation for power, space, and environmental specs; compatibility with existing systems; specialized labor and training, and required certifications, data standards, and materials. |
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| 1. Implementation Plan and Timeline   Include a high-level rollout plan that contains planning and procurement; installation or deployment; pilot testing and validation; full-scale implementation; and monitoring and optimization. Show expected timelines with key milestones and responsible roles. |
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| 1. Evaluation and Success Metrics   Define how performance will be measured post-implementation. Examples include throughput increases, downtime reductions, energy efficiency gains, user adoption and satisfaction, and quality, accuracy, or compliance improvements. |
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| 1. Approvals and Next Steps   Summarize the key stakeholders and who must approve, the required funding or procurement triggers, the decision deadlines, and the action items to initiate the project. |
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