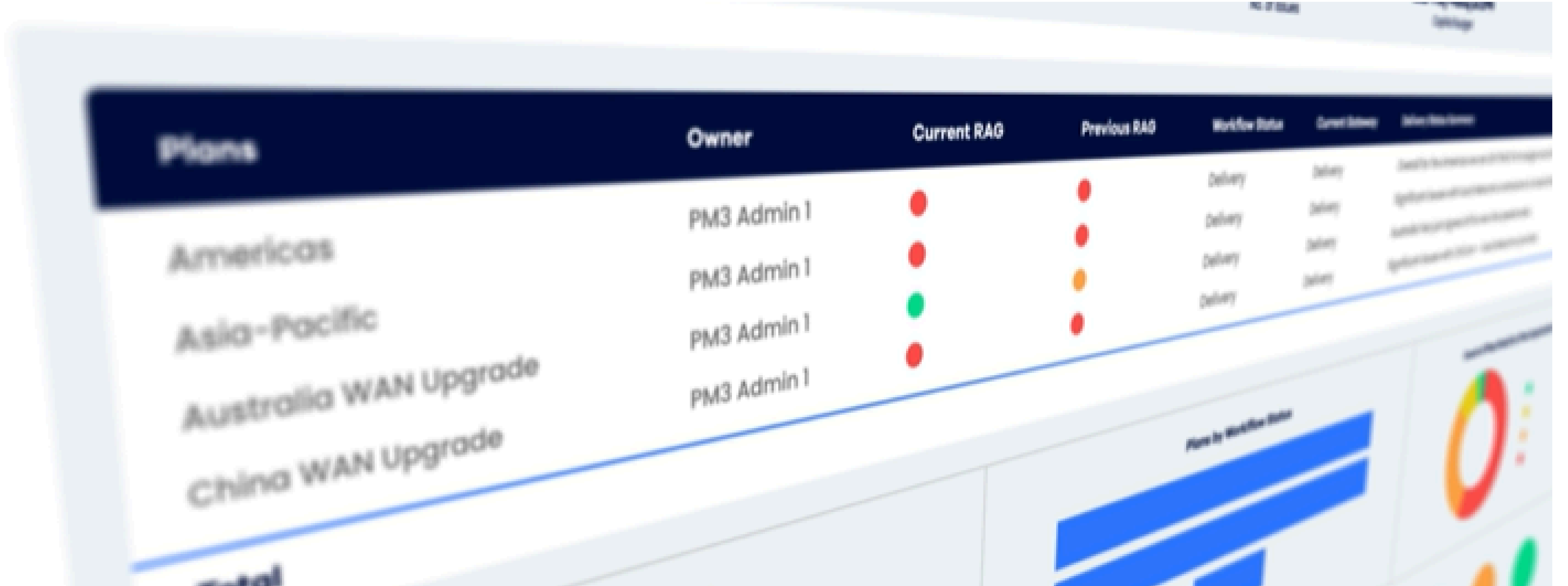
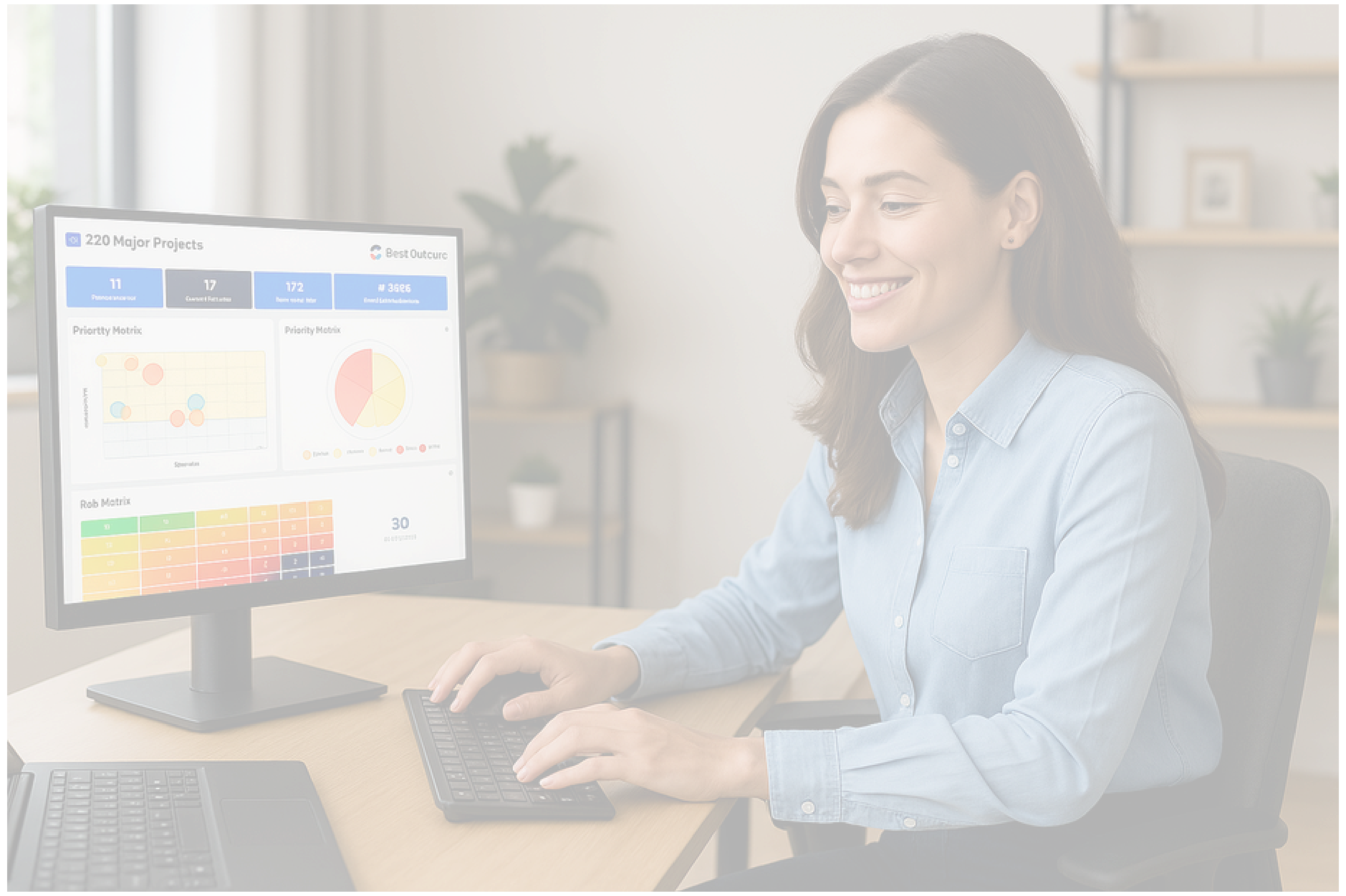
PPM Business Case Pack

Templates to build evidence-led business cases Finance can trace



How to use this pack

- Start with the one-page Business Case Canvas to align story, outcomes and scope.
- Populate the Benefits Register and Baseline & Measurement Plan (owners + dates).
- Score against the 5Ps to expose weak spots before Finance does.
- Map the finance traceability flow: outcomes → benefits → baselines → owner → review.
- Attach evidence in the checklist (data sources, cost model, options, sensitivity).
- Record decisions and assumptions (use 'tracker' or 'record' instead of 'log').
- Use the sign-off page to agree next steps and governance dates.



Business Case Canvas (one-pager)

Problem / Opportunity Why now? Current pain, drivers, scope.	**Strategic Fit** Objectives, alignment, success criteria.	**Options** Do nothing vs options. Preferred option & rationale.
Outcomes Measurable outcomes; link to objectives.	**Benefits (KPIs)** Cashable / non-cashable; who benefits.	**Baselines & Data Sources** Baseline value/date, where data comes from.
Costs & Risks Capex/opex, risk headlines, sensitivity.	**Dependencies** People/process/systems; assumptions.	**Decision Required** Funding ask, timeframe, approvals.

Benefits Register (tracker)

Benefit	Type	Owner	Measure / KPI	Baseline	Target	Realisation date	Data source	Review cadence	Status

Baseline & Measurement Plan

Metric	Baseline value	Baseline date	Measurement method	Frequency	Owner	Notes

Finance Traceability Flow

Outcomes | Benefits | Baselines | Owner | Review

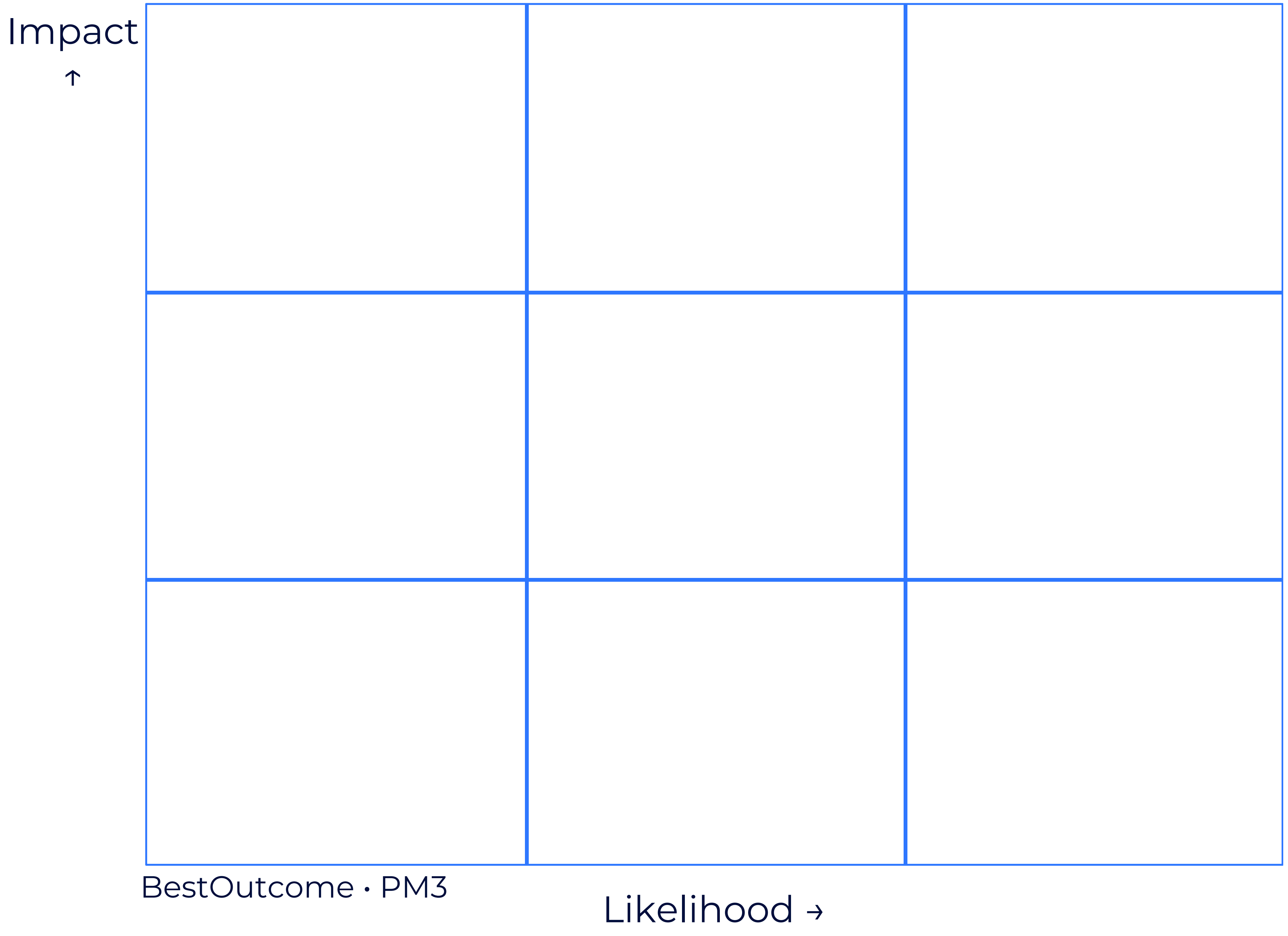
5Ps Scorecard (boardroom test)

P	Score (1-5)	Evidence for Finance	Actions to close gaps	Owner	Due
People					
Process					
Performance					
Promotion					
PPM					

Stakeholder & Comms Plan

Stakeholder/ Role	Interest/ Influence	Value proposition	Message	Channel	Owner	Next touchpoint

Risks to Buy-In



- Finance disputes benefits
- Baseline data unavailable
- Ownership unclear
- Timing misses governance window
- Costs lack sensitivity analysis

Assumptions & Dependencies

Assumption / Dependency	Impact if false	Validation test	Due by	Owner	Status

Evidence Pack Checklist

- Problem statement & strategic alignment
- Benefits map with KPIs (cashable/non-cashable)
- Baselines with source & date
- Cost model (capex/opex) + sensitivity
- Options appraisal (including “do nothing”)
- NPV / payback / ROI summary
- Resource plan & capacity check
- Risk & issue summary
- Stakeholder & comms plan
- Governance route & decision dates
- Draft Realisation Plan (owner, cadence)

Decision Record

Date	Decision	Decision maker(s)	Rationale	Implications	Follow-up actions

Next Steps & Sign-Off

Action	Owner	Due	Dependencies	Status	Sign-off