

# Business Case One-Pager

Build a clear, compelling case for any technology investment — before you look at a single vendor.

## WHAT THIS TEMPLATE DOES

Most technology decisions go wrong because nobody wrote down *why* the business needed the tool in the first place. This template walks you through the 10 questions every solid tech decision starts with — the problem, the impact, the outcome you want, the budget, and the cost of doing nothing. When you're done, you'll have a one-page case you can share with your team, your leadership, or a vendor — and use to judge every option against what actually matters.

## How to Use This Template

### 1 Pick ONE decision to work on

Don't fill this out generically. Open it for a specific tool you're weighing right now — CRM, scheduling, accounting, operations. Whatever is top of mind.

### 2 Fill in every field — don't skip

If you can't answer "What does success look like in 90 days?", you're not ready to buy yet. Blank fields are red flags, not gaps to leave empty.

### 3 Share it before deciding

Share with anyone who will use the tool, approve the budget, or be affected by the change. Get their input before you sign anything.

### 4 Bring it to vendor conversations

Your required capabilities and success metrics become the questions you ask vendors. Don't let the demo drive — you drive it.



#### Time to complete

Plan 30–60 minutes. Rushed business cases lead to expensive regrets.



#### Type or print

Type directly in the fields, or print and handwrite. Works both ways.



#### One per decision

Use a fresh copy for each tool you evaluate. Each decision earns its own case.

# Business Case One-Pager



Complete before evaluating any technology

BUSINESS / ORG NAME	PREPARED BY	TECHNOLOGY BEING EVALUATED	DATE
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## 1 The Problem We're Solving START HERE

Specific pain point in plain language — what breaks, slows down, or gets missed today?

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## 2 Who Is Affected PEOPLE + PROCESS

TEAM ROLES / PEOPLE WHO FEEL THIS DAILY

MAIN PROCESS OR WORKFLOW INVOLVED

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## 3 Business Impact of NOT Solving It COST OF INACTION

Time, money, customer experience, or team cost?

ESTIMATED LOSS PER WEEK / MONTH

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## 4 The Outcome We Want DEFINE SUCCESS

What does "fixed" look like — the ideal state once the right solution is in place?

SUCCESS LOOKS LIKE, IN 90 DAYS

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## 5 Required Capabilities MUST-HAVES

Only what the solution MUST have — not nice-to-haves.

MUST INTEGRATE WITH

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## 6 How We'll Measure Success SUCCESS METRICS

Numbers or behaviors that tell us it's working:

M1	_____	90-DAY REVIEW DATE	_____
M2	_____		_____
M3	_____		_____

## 7 Budget & Timeline INVESTMENT PARAMETERS

TOTAL BUDGET RANGE (YEAR 1)

TARGET GO-LIVE DATE

MAX TOLERABLE DELAY

All costs — not just subscription

Realistic, not wishful

What if we miss target?

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## 8 ⚠ Risks of Doing Nothing DECISION CONTEXT

What gets worse or more expensive if we delay 6 months?

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## 9 ✓ Recommended Next Step DECISION CONTEXT

Single best immediate action (schedule demos, run a pilot, get quotes).

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## 10 Initial Decision SELECT ONE

**GO**

Business case is solid. Move to vendor evaluation (Step 3).

**HOLD**

Need more info. Revisit by: \_\_\_\_\_

**STOP**

Not the right time or tool. Reason: \_\_\_\_\_

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## Approvals & Sign-Off Before moving forward

PREPARED / SUBMITTED BY

APPROVED BY

APPROVAL DATE

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