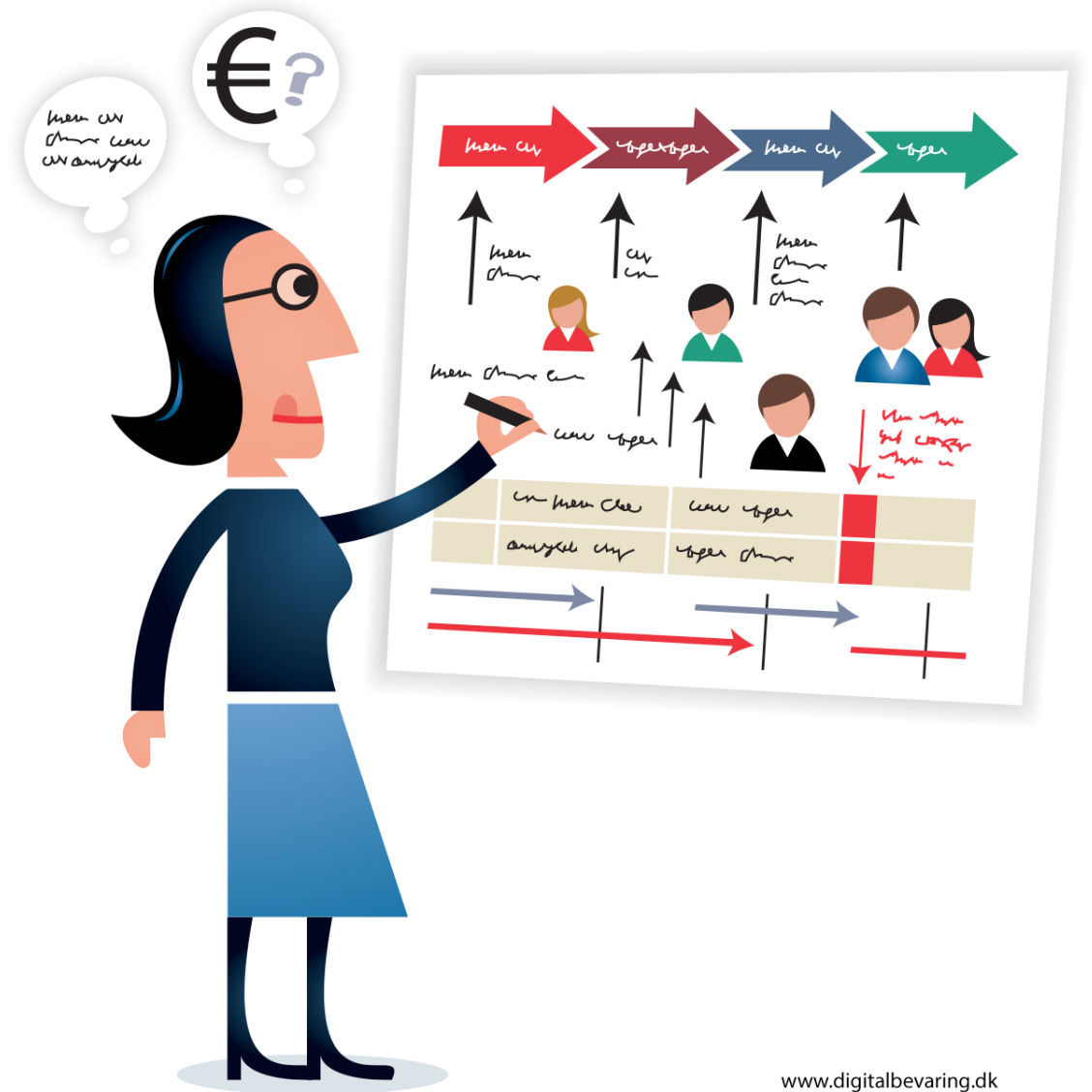
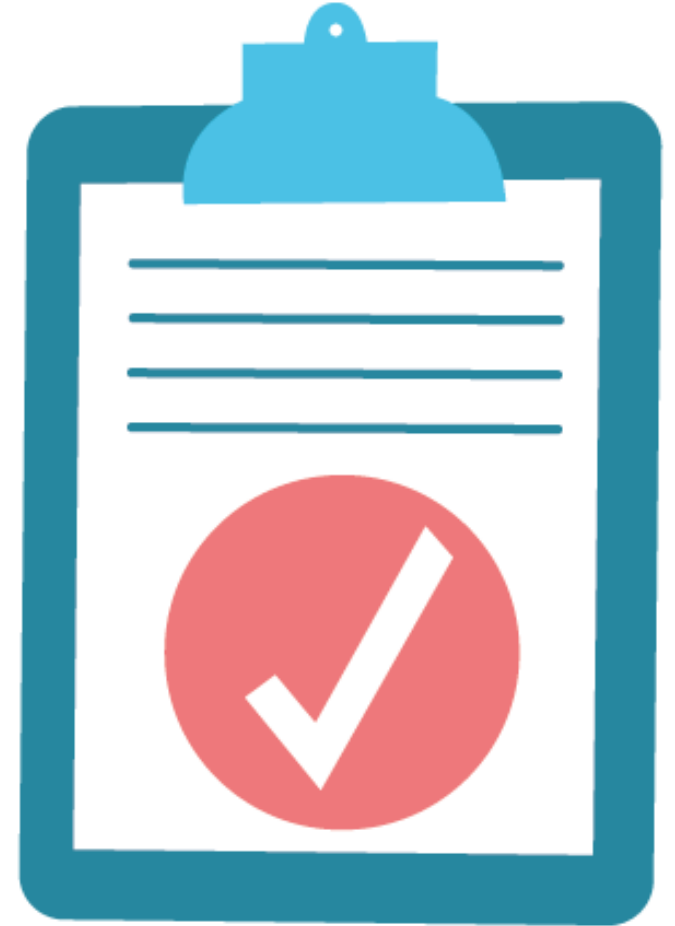


Now for a Business Case!



What is a Business Case?

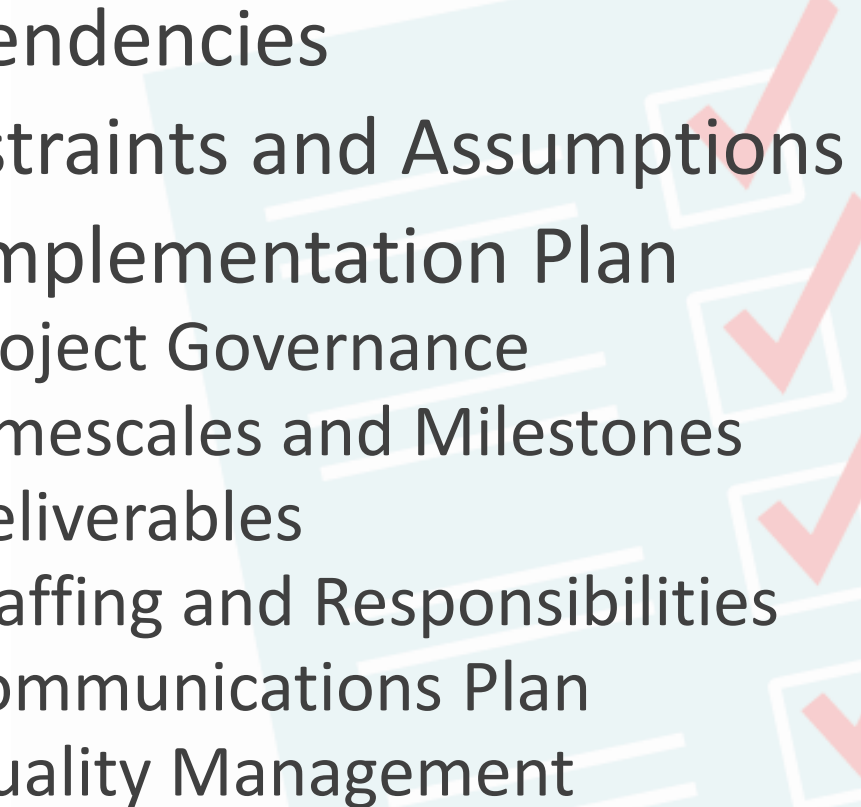
- A business case captures the reasoning for initiating a project or task.
- Key step in gaining (financial) support and resources for programme/project
- Back to the Golden Circle:
Why→How→What



What is *in* a Business Case?

May include sections on:

- Scope
- Objectives
- Strategic Fit
- Stakeholders
- Financial Analysis/Options Appraisal
- Benefits
- Risks

- Dependencies
 - Constraints and Assumptions
 - An Implementation Plan
 - Project Governance
 - Timescales and Milestones
 - Deliverables
 - Staffing and Responsibilities
 - Communications Plan
 - Quality Management
- 
- A light blue graphic of a checklist with four red checkmarks. The checklist is tilted and contains several lines of text, some of which are partially obscured by the checkmarks. The checkmarks are positioned to the right of the text lines, indicating that the items have been completed or verified.

Steps for Developing a Business Case



1. Assess Where You Are

- Assess your institutional readiness
 - e.g. A RAM Assessment

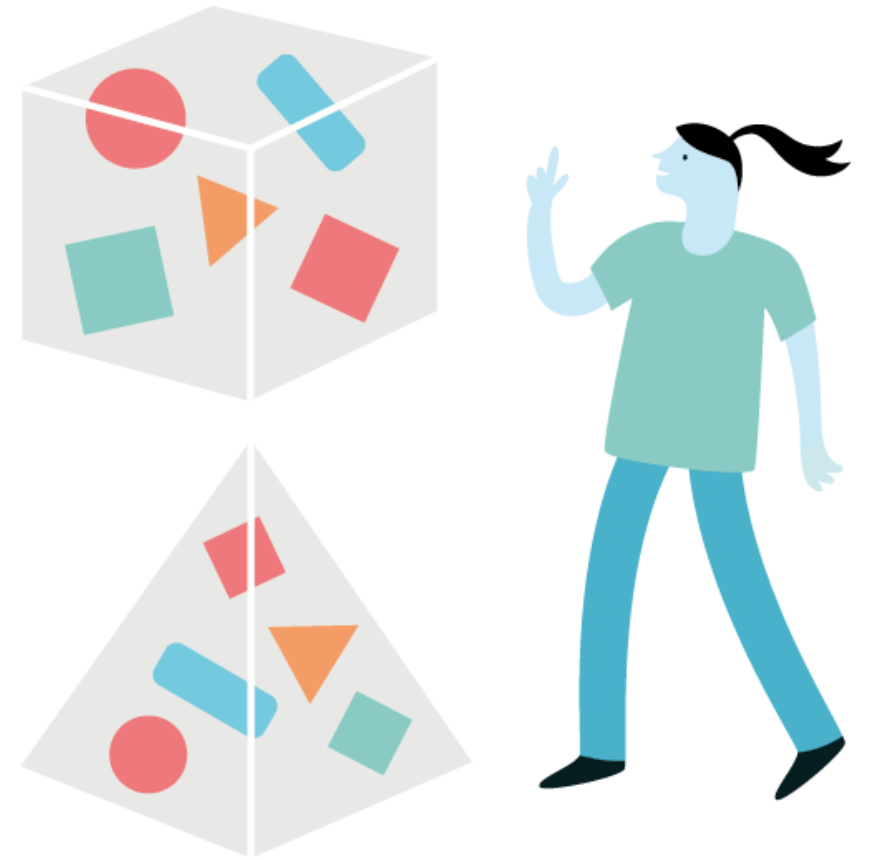
Depending on the scope and granularity of your activity you may want to:

- Audit your digital collections
 - Assess and understand the characteristics of a collection of digital assets
- Conduct a risk assessment
 - DP risks
 - Organizational risks



2. Clarify Your Objectives

- Understand your high-level DP objectives
- Decide what you want the business case to provide
 - A subset of the high-level objectives that you need resources for
- Clearly and concisely articulate:
 - What you want to achieve
 - What you need to achieve it
- Define the scope of the activities



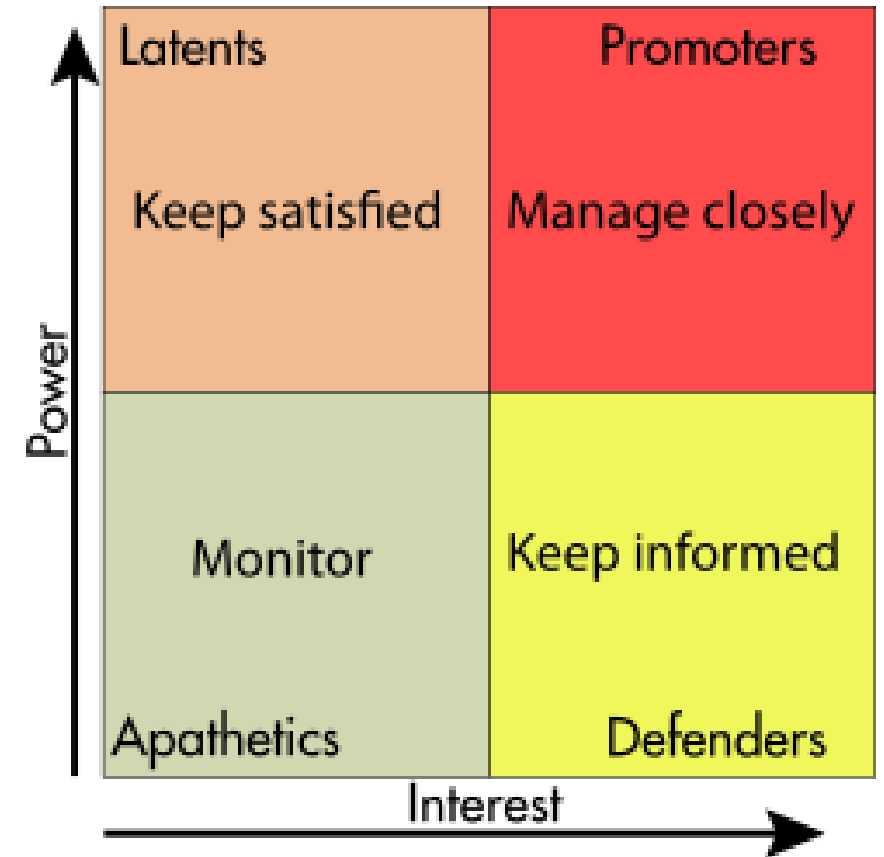
3. Understand Your Audience and Organizational Context

- Know what you need to include in your business case
 - Check if your org has a standard business case template
 - Look at example business cases and case studies
- Read your organization's high-level strategy documents
 - Consider completing a PESTLE analysis
- Identify your key stakeholders
 - Those with an interest in the success of your DP work
- Identify your audience
 - Who will review your business case
- Consider if the timing is right...



3a. Stakeholder Analysis

- Deciding how to group stakeholders is key:
 - Affected by vs Able to effect
 - Relationship to area of work/stage of lifecycle
 - Their role
- Once identified should be prioritized
 - e.g. Where they sit on a power matrix (see right)
- Tailor advocacy to each group:
 - Form of advocacy
 - Frequency
 - Information to be shared



4. Draft Business Case

- Bring together all of the information gathered
- Think carefully about the language you use
 - Avoid jargon, provide simple explanations
- Make sure you know how your business case will be presented/assessed
 - May need to produce other supporting resources – e.g. presentations, elevator pitch



5. Validate and Refine

- Try for an independent and objective review
 - Is it realistic?
 - Does it use appropriate language?
 - Are there assumptions about DP knowledge?
 - Are there gaps in evidence or unrealistic assertions?
- Identify weaknesses
- Consider why some reviewers might not be receptive or have different perspectives, agendas, and/or priorities



6. Deliver Effectively

- Try to identify a main sponsor/advocate
 - Brief them on key issues
- Create an Elevator Pitch
 - Be prepared for any impromptu opportunities to help sell the business case!
- If presenting your case in person, make sure to practice ahead of time
 - Consider and prepare for likely questions
- Persistence may well be required
 - May need to re-submit your case at a later date
 - Adapt it to the feedback you receive after the 1st presentation



7. Share!

- If possible, remove sensitive details from your business case and share to help others...
- DPC looks for resources to complement our advocacy tools!



Business Case Toolkit

- Step by Step Guide
- Business Case Templates
- Common Questions
- Case Studies
- Additional Resources.....

http://wiki.dpconline.org/index.php?title=Digital_Preservation_Business_Case_Toolkit

