

Organisation [Name]

Department [Name]

Programme Business Case

**<Programme Name>**

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*This template is based on PM²-PgM v1.0*

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# Programme Initiation Request Information

|  |  |  |  |
| --- | --- | --- | --- |
| **Programme Title:** | *<Initial programme title proposal.>* | | |
| **Initiator:** | *<Any person (usually from the business community) can define a need for the programme* | **Organisation / Department:** | *<Indicate who is requesting the programme.>* |
| **Date of Request:** | *<Date that the programme request form is completed.>* | **Estimated Duration:** | *<Estimated duration of the programme.>* |
| **Type of Delivery:** | In-house  Outsourced  Mix  Not-known | | |

# Context

## Situation Description and Urgency

<This section should detail the high-level situation description included in the Programme Initiation Request, complemented by pertinent considerations regarding the urgency of addressing it.>

## Situation Impact

<This section should describe the organizational impact of the described situation. This impact can be described on different aspects:

* The impact in the organization's strategy;
* The impact on the business processes;
* The impact on the IT landscape.>

### Impact on *Strategic Objectives*

<Describe how the programme aligns with the strategic objectives of the organisation. For now, this can be a high-level view, that will be detailed later on in the Programme Charter.>

|  |  |  |
| --- | --- | --- |
| **ID** | **Strategic Objective** | **Impact of the programme** |
| SO1 |  |  |
| SO2 |  |  |
| SO3 |  |  |
| SO4 |  |  |
| SO5 |  |  |

### Impact on *Processes*

<Although a detailed analysis of the business process may be documented at later stage of the programme, this section should provide already a high-level view on the business processes impacted by the programme.>

| **Process Category** | **Process** | **Impact of the programme** |
| --- | --- | --- |
| Asset Management |  |  |
| Audit |  |  |
| Communication (external) |  |  |
| Communication (internal) |  |  |
| Coordination |  |  |
| Document Management |  |  |
| Financial Management |  |  |
| Grant Management |  |  |
| Human Resources | *Selection of new staff* |  |
| IT |  |  |
| Legislation Lifecycle |  |  |
| Logistics |  |  |
| Manufacturing |  |  |
| Policy Lifecycle |  |  |
| Procurement |  |  |
| Research & Development |  |  |
| Sales |  |  |
| Strategic Management |  |  |

### Impact on *IT landscape*

<If already known at this point, describe from an helicopter view how the programme would impact the existing IT landscape.>

## Interrelations and Interdependencies

<This section should describe the interrelations and interdependencies of the current situation and therefore relating it to other problems, opportunities or needs. These interrelations and interdependencies can be found "inside" the organization and "outside" of the organization. This analysis is important as it places the current situation in the broader context of the organization and the interrelations with other environments outside the organization (for example, external stakeholder groups).>

# Positioning

## Programme Scope

<This section should describe the entirety of the programme effort and its limits. Being able to define is in and out of scope for the programme is extremely important for the Programme Manager to manage changes not originally identified at the conception of the programme. Usually, the programme consists of a series of interrelated projects. This section can be used to list which projects fall within the programme and which ones may not.>

## Assumptions

<An assumption is a hypothesis or piece of unconfirmed information that is considered to be true at this point in order to proceed with an activity. Every assumption needs to be validated as soon as possible during the programme since they represent a risk.

This section should describe any project assumptions related to business, technology, resources, organisational environment, scope, expectations, schedules, etc.>

## Constraints

*<A constraint is an internal or external limitation (fact) to a programme or one of its projects that has a direct effect on its performance.*

*This section should describe any constraints that affect the way we can manage this programme. Constraints can come from areas such as the people that can be involved, resources or products to be reused or acquired, technology to be employed and interfaces to other products. List the constraints based on the current knowledge.*

*Mention constraints that arise both from the organisation (internal) as well as from the external (to the project or/and organisation) environments..>*

## Risks

*<The programme’s main risk is not delivering the expected benefits. However, other risks (mainly related to the projects contained within) can be identified. It is important that this section only contain programme-specific risks – that can then later be mitigated to increase the chances of delivering the benefits.*

*This section should highlight the key risks that are identified at this initial stage and proposes corresponding risk management strategies. This initial risk assessment does not replace the full risk assessment that is conducted during the planning phase. You may refer to the Risk Log for a complete list and description of risks and corresponding actions – provide a link to the Risk Log.>*

# Schedule

## Timing and Milestones

*<This section should list the important points in time of the programme lifecycle (i.e., milestones) for the delivery of the benefits. The list can also include an indication regarding the foreseen timing of the major phases (e.g., Initiating, Planning, Executing, Closing) and programme stages.>*

|  |  |  |
| --- | --- | --- |
| **ID** | **Milestone Description** | **Target Delivery Date** |
|  |  |  |
|  |  |  |

# Expected Benefits

## Benefits Overview

*<Identify the overall benefits meant to be delivered by the programme. Note that in this section, it is important to list the high-level benefits. During the planning stage, these benefits will be further detailed in the Programme Business Implementation Plan.>*

## Benefit Value

*<Provide at least the information requested in the table below, and add further details if necessary.>*

|  |  |  |
| --- | --- | --- |
| **Benefit** | **Required change** | **Estimated value** |
| Benefit 1 | *<Define the changes to be implemented in order to enable the delivery of this benefit. This serves as an input to the cost estimations for the programme.>* | *<Indicate cost savings, profits, efficiency gains, etc. that represent the advantage of this benefit. Indicate clearly if this is a one-off or a recurrent advantage. If possible try to express the value in a monetary value to facilitate the viability assessment>* |
| Benefit 2 |  |  |
| Benefit 3 |  |  |
|  |  |  |

# Cost vs. Benefits

<This section should demonstrate that the expected benefits outweigh the estimated investment cost to build, maintain and implement the programme solution.>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Solution Implementation Costs** | 20XX | 20XX | 20XX | 20XX | 20XX | 20XX |
| Solution Development |  |  |  |  |  |  |
| Solution Maintenance |  |  |  |  |  |  |
| Support & Training |  |  |  |  |  |  |
| Infrastructure |  |  |  |  |  |  |
| **TOTAL** | 1.500 k€ | 2.500 k€ | 1.500 k€ | 300 k€ | 300 k€ | 300 k€ |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Business Implementation Costs** | 20XX | 20XX | 20XX | 20XX | 20XX | 20XX |
| Change management |  |  |  |  |  |  |
| Start-up costs |  |  |  |  |  |  |
| Training |  |  |  |  |  |  |
| **TOTAL** | 100 k€ | 200 k€ | 100 k€ | 0 k€ | 0 k€ | 0 k€ |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Benefit Value** | 20XX | 20XX | 20XX | 20XX | 20XX | 20XX |
| Benefit 1 |  |  |  |  |  |  |
| Benefit 2 |  |  |  |  |  |  |
| Benefit 3 |  |  |  |  |  |  |
| **TOTAL** | 300 k€ | 750 k€ | 1.500 k€ | 2.000 k€ | 2.000 k€ | 2.000 k€ |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **TOTALS** | 20XX | 20XX | 20XX | 20XX | 20XX | 20XX |
| Solution implementation costs | -1.500 k€ | -2.500 k€ | -1.500 k€ | -300 k€ | -300 k€ | -300 k€ |
| Business implementation costs | -100 k€ | -200 k€ | -100 k€ | 0 k€ | 0 k€ | 0 k€ |
| Benefits | +300 k€ | +750 k€ | +1.500 k€ | +2.000 k€ | +2.000 k€ | +2.000 k€ |
| TOTAL per year | -1.300 k€ | -1.950 k€ | -100 k€ | +1.700 k€ | +1.700 k€ | +1.700 k€ |
| **TOTAL accumulated** | **-1.300 k€** | **-3.250 k€** | **-3.350 k€** | **-1.650 k€** | **50 k€** | **1.750 k€** |

# Viability Assessment (Go/No-Go Continuation Criteria)

*<Asses the programme's viability based on the information of previous sections regarding implementation costs and delivery of benefit value over time. Indicate clearly if the programme should be pursued or not and why.*

*This section is particularly important to help management decide to launch the programme in the first place. It is also recommended to actualise the business case after each programme stage, to assess if the programme is still worth continuing. >*

# Governance

## Programme Owner (PgO)

<As defined in the PM² Programme Roles & Responsibilities, the Programme Owner is accountable for the overall success of the programme.>

## Programme Business Manager (PgBM)

<As defined in the PM² Programme Roles & Responsibilities, the Programme Business Manager is responsible for the creation of this document.>

## Programme Manager (PgM)

<As defined in the PM² Programme Roles & Responsibilities, the Programme Manager (if already known) supports the creation of this document.>

## Approving Authority (AGB)

<The overarching authority over the programme, responsible for the investment decisions, defining the direction of the business, and ensuring the overall alignment of the programme with the strategic direction.>

Signature of the approving authority …………………………… Date ………

Appendix 1: References and Related Documents

<Use this section to reference (or append if needed in a separate annex) any relevant or additional information. Specify each reference or related document by title, version (if applicable), date, and source (for example, the location of the document or the publishing organisation).>

|  |  |  |
| --- | --- | --- |
| **ID** | **Reference or Related Document** | **Source or Link/Location** |
| 1 | *<Example of a related document>*  *<01.Project\_Initiation\_Request.XYZ.11-11-2013.V.1.0.docx>* | *<Example of a location>*  *< U:\Documents\>* |
| 2 | Project folder | *<Insert project folder location.>* |
| 3 |  |  |