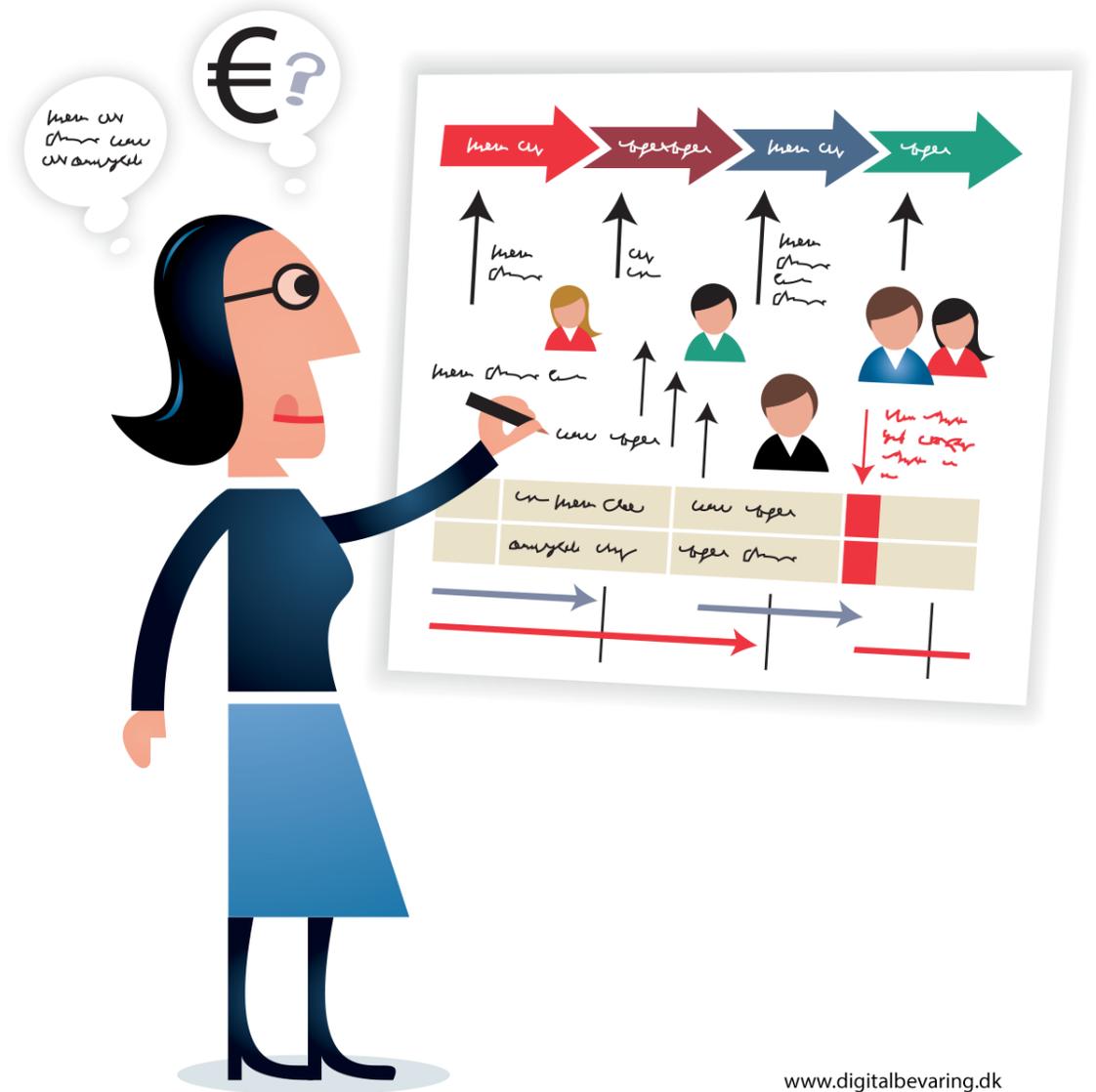
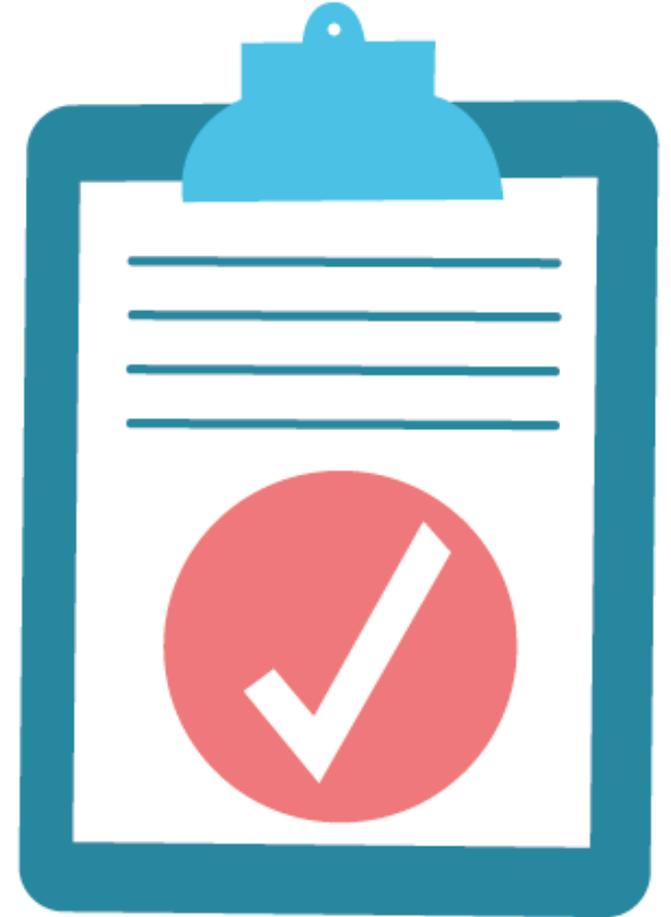


Now for a Business Case!



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?

- Executive Summary
 - Problem Statement
 - Who, What, When, Where, Why?
 - Background and Context
 - Current capabilities, work to data, scope of collections, links to strategy, key stakeholders
 - Options
 - Requirements, descriptions and assessments of options, recommendation
 - Implementation Plan
 - Scope, Objectives, Dependencies and Assumptions, Roles and Responsibilities, Project Governance
 - Benefits
 - Risks
 - Resourcing/Financial Analysis
 - Cost/Benefit Analysis
- 

Developing a Business Case: Research and Planning



Organizational Context

- Understand strategic context
 - Mission, strategy, policy
 - PESTLE Analysis
- Assess current DP capabilities
 - A RAM Assessment
 - Previous business cases
 - Existing systems and staffing
- Depending on the scope and granularity of your activity you may want to:
 - Audit your digital collections
 - Conduct a risk assessment
 - Investigate activities at other organizations



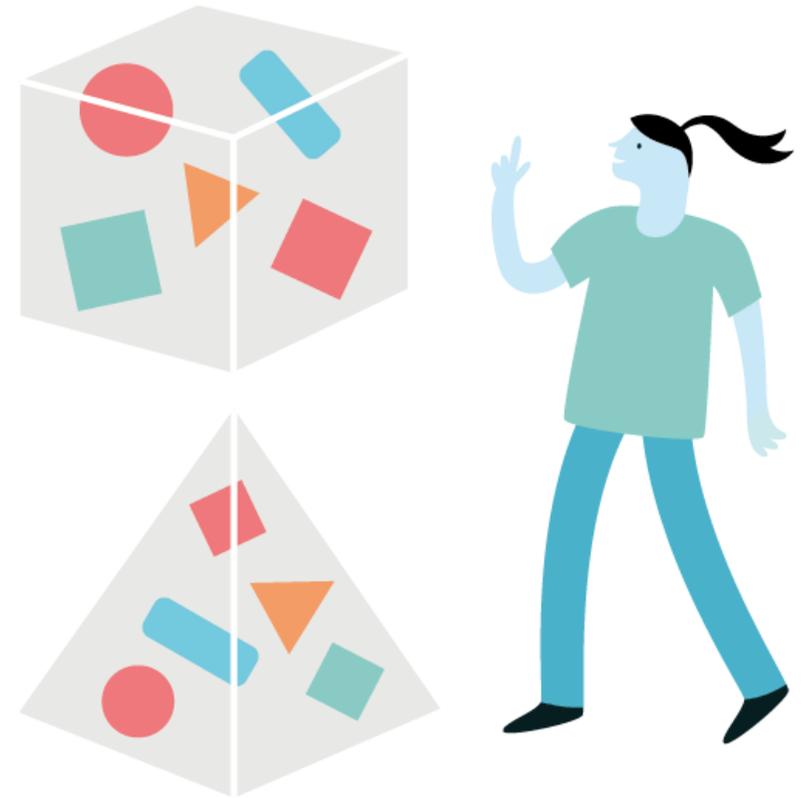
Identifying Your Audience

- Who will:
 - Assess your business case?
 - Be affected by the resulting activities?
- Are stakeholders internal or external?
- Helps with the right tone, language, structure, and content
- What “hooks” will work
- Remember to identify champions



Consider Options

- Understand your high-level DP objectives
 - Perhaps a SWOT Analysis
- 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 and the required budget



Business Case Requirements

- Know what you need to include in your business case
 - Check if your org has a standard business case template
- Consider if the timing is right
 - Is there a specific funding cycle?
 - Can you avoid busy times?
 - Make sure it is expected
- Look at previous examples
 - Can learn from successful and unsuccessful
- Ask for advice and input



Developing a Business Case: Drafting and Delivery



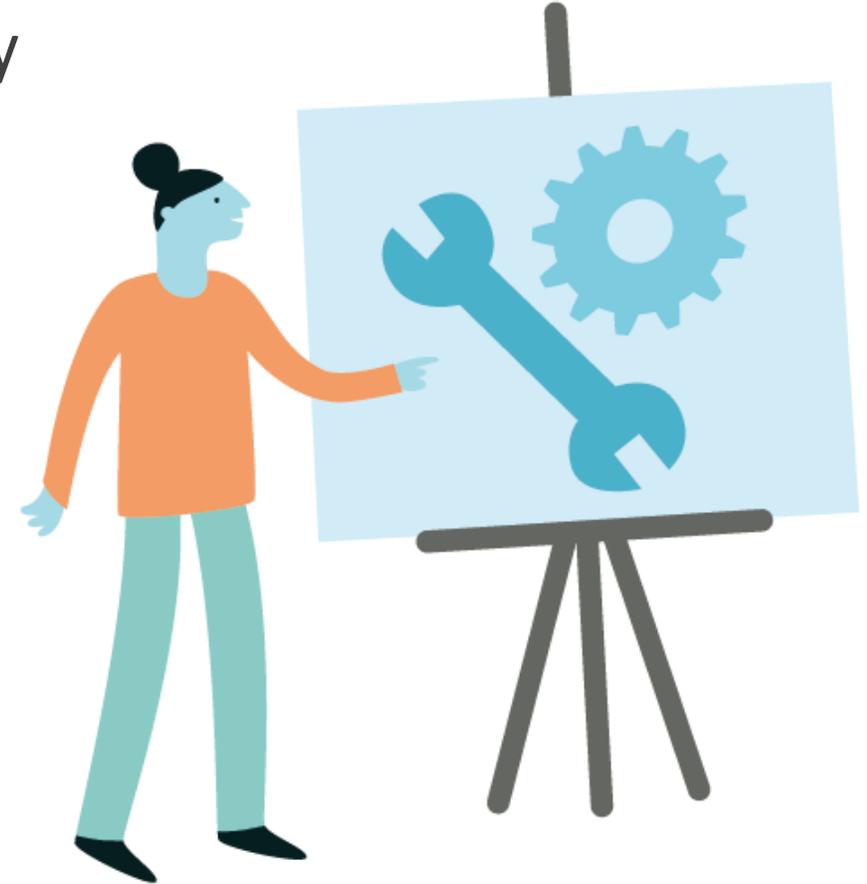
Draft Business Case

- Bring together all of the information gathered
 - Key facts, evidence, costs, benefits, value, impact and other details
- Collaborate with key stakeholders and experts within your organization
- Validate and refine through 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?



Deliver Effectively

- Make sure your sponsor/advocate is briefed 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



Share If You Can!

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



Final Tips



What Makes a Good Business Case

- Using the correct format
- A clear statement of need
 - Aligned to strategy/mission
 - Supported by evidence
- Clear, concise, jargon-free text
 - Supplement with graphics where they add value
- Well-defined scope and objectives
- Clear and realistic plan for implementation
 - Including budget, assumptions, and dependencies
- Considered analysis of risks and benefits

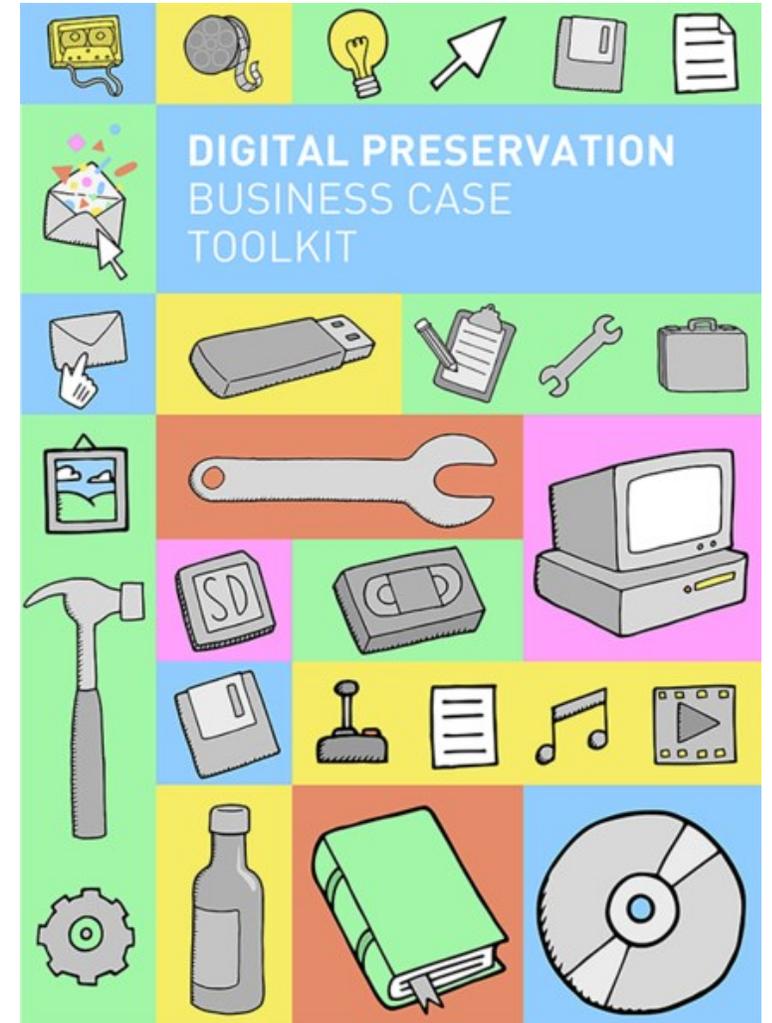


Business Case Toolkit

- Step by step guide
- Business case template
- Common questions

- New edition coming soon!

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



Any final questions?

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