

Guideline for Completing the PLF Business Case Proposal using the Template



Provincial Lab Formulary

Business Case Proposal

[Title of Business Case Proposal Here]

[Vision Statement (Optional)]

Underneath the heading on the cover page, you'll want to grab their attention and make them turn to the next page, with more detailed info, so give them a snappy vision. Keep it short and sweet.

[Enter Date DD-Month-YYYY]

This guideline is used to develop the PLF Business Case Proposal Template # ####

Proposals submitted for funding should be mindful of a non-medical audience.

In drafting the proposal, clearly articulate:

- how an initiative will improve patient care
- how costs may be impacted by testing volumes
- what is best practice in Canada and what are other jurisdictions doing
- what is the funding request (e.g., absorb costs within current program funding; absorb costs within program funding for current fiscal year only and request new funding for subsequent years through the budget process; request funding to be



Authority Signatures

This section contains the signatures of key stakeholders, indicating that they agree with the presentation or proposal as it appears in the business case.

Full name

Date

Executive Sponsor

Position, Organization

Full name

Date

Project Lead

Position, Organization

Full name

Date

Project Manager

Position, Organization

Full name

Date

Title

Position, Organization



Executive Summary

Provide an executive summary (high level) that captures only the essential elements of the business case being presented. Include the business case's most pertinent facts in a clear, concise, fashion.

- The grand opening that grabs the audience's attention and pulls them in.
- Short statement that addresses the problem or proposal detailed in the attached documents, and features background information, a concise analysis, and a conclusion.
- Just the right amount of detail necessary to convince the sponsor or stakeholder that the project you're proposing is worth their time and financial investment.
- Used to give investors and stakeholders a quick overview of important information about a business plan designed to help executives and investors decide whether to go forth with the proposal.
- Briefly outline each section of your proposal and introduce your business or project the stakeholders, so it must be persuasive to spark their interest know the needs of the potential clients or investors and zero in on that.
- Do not use more than this one page if possible as you may lose your busy reader. It needs to be as concise as possible hitting only on the key elements and conclusions.

Examples of information to include

- Summary reasoning for business proposal – may be bulleted.
- Last time changes were made, if changes are to be made to a test, way something is collected please explain why.
- Propose replacement from one test to this one if applicable
- Are extra costs to be incurred due to the change
- Is this making it easier for equal access to care

**Clearly articulate
how this
initiative will
improve patient
care**



Introduction (or Project Definition)

General information about your project, such as the objectives that will be achieved and the project plan outline.

- State your business case to address a need that aligns with the larger business objectives of the organization.
- Offer a full look at how the project will benefit the organization.
- Identify the need or problem the project is addressing. Be sure to explain who the target customer is and why they will benefit.

Example of information to include

- Explain why a specific test is performed
- The purpose of this specific testing
- Does it detect potential risk factors, replacing or an addition to a test, does it meet the recommended standards within North America
- Proposed shift to using this test including any tables, abbreviation definitions etc.

Visions, Goals, and Objectives

What you're trying to do and what is the problem you want to solve.

- Define your project vision, goals, and objectives.
- Describe future goals, current and future objectives
- Align with its mission, strategic planning, culture, and core values.
- Indicate what the submitting party (organization/division) wants to accomplish in the future including the purpose of the proposal.
- What is the best practice in Canada and what are other jurisdictions doing?
- May include a mission statement (core values or guiding principles of your organizational culture.).
- be as specific as possible to get a full and clear understanding of the project's goals.

Scope

Establish the boundaries. What is in scope. What is out of scope. Defining the scope will help prevent scope creep and delays to the project later on.

- Describe the work you're agreeing to deliver.
- Describes the constraints or limitations of the project.
- The scope statement defines what's in, and what's out of the project:
 1. What's being delivered (or in scope)
 2. What's not being delivered (or out of scope)
 3. Assumptions to clarify the deliverables
 4. Clarifications needed for any of the above



Background Information

Provide a context for your project, explaining the problem that it's meant to solve, and how it aligns with your organization's vision and strategic plan.

- Brief overview of the reasons why the project or business change has come about: the problem, opportunity, or change of circumstances.

Precedent (if applicable)

If a precedent has been set for this proposal – describe and provide information as applicable to this business case.

Project Management Strategy

Demonstrate that the organization has and will apply a sound methodology to manage the project during its life cycle and through post-implementation.

- Timeline: How long do you believe the project will take? Break it into milestones, but not too much detail.
- Team: Who do you need to complete the project? Summarize the team you envision, their experience and skill sets.

Governance and Oversight

Structures, systems, and practices in place to: assign decision-making authorities, define how decisions are to be made, and establish the organization's strategic direction.

Risk Assessment

Explains how risk and opportunity are managed. Summarize the significant project risks and opportunities and how they are managed. The risks included should cover those that could arise from your project or the organization's ability to deliver change.

- What risks are involved?
- What are the consequences of a risk happening?
- What opportunities may emerge?
- What plans are in place to deal with the risks?

Financial Appraisal

Identify the financial implications for the project. Include costs and benefits. See Appendix 2: template/example.

- **Resources:** List what you'll need to complete the project, from software and hardware to materials and equipment. Clearly articulate how costs may be impacted by testing volumes.
- **Budget:** What is the expected financial commitment?
- **Funding Request:** What is the funding request (e.g., absorb costs within current program funding; absorb costs within program funding for current fiscal year only and request new funding for subsequent years through the budget process; request funding to be reallocated from another program area or initiative).



Success Criteria and Stakeholder Requirements

Define quality requirements and how they are critical to the project's success. May include data analysis to demonstrate positive impact to organization.

- Qualitative and quantitative ways of determining whether your project was successful or not.
- Demonstrate improvement to patient care
- Team satisfaction
- Performance in terms of time, cost, and quality
- Health care professional satisfaction

Performance Measurement Strategy (may be included in previous section)

Indicate how the organization will address performance measurement for project implementation and benefits realization.

- Description of how performance will be measured once implemented.
- Projected baseline and expected improvement metrics.

Change Management Strategy

Describe how the potential impact of the proposed change on organizational culture, systems, and processes and on people working within and with the invested organizations will be managed in later stages of the project management process.

How will change be managed and implemented?

Summary (or Conclusions)

Last opportunity to make an impression. Wrap up with a strong summary of the importance of the project and crucial improvements/benefits.

- E.g. why this test needs to be added and performed and best option for the safest and most accurate screening if applicable

Recommendations (optional)

Numbered or bulleted list of recommendations.

Appendices

Statistics, tables, external documents, flow charts, statistical analysis, data trends, or other information to extrapolate on content in body of document.



Appendix 1

Glossary of Acronyms and Terms

Provide all acronyms in full and define all terms required to understand the business case properly.

Acronym	In Full
Term	Definition



Appendix 2 (Optional but recommended)

Cost Benefit Analysis Template/Example

This is one simple example. There are many ways to document the cost-benefit analysis. This table may be used in the Business Case document if desired but not mandatory.

Cost Benefit Analysis: Customer Service System				
Costs				
Category	Item	Quantity	Price	Total
Hardware & Services	User workstations	7		
	Server System	2		
	Secure networked printers	2		
	Software licenses	7		
System Training		7		
Testing Materials	Test Kit	30 per year		
	Microscope	2		
	Stain	10 per year		
				TOTAL COST \$
Benefits				
Improved diagnostic ability (specificity / accuracy)				
Improved patient outcomes				
Decreased test time / human resource costs				
Enhanced productivity				
Workflow efficiencies				
Higher quality database				
				TOTAL BENEFITS \$



References

List references cited or used as evidence to make argument for the case being proposed (journals, standards, guidelines, articles, texts, etc.

[How to Write a Business Case - ProjectManager.com](#)

[Business Case Template - Canada.ca](#)