

PREPARED BY	Your name / role / team	DATE
ORGANIZATION	Business unit / division	AUDIENCE

STRATEGIC CONTEXT

STRATEGIC PRIORITY	e.g. 'Improve employee experience and reduce IT operational costs over the next 12 months'
DESIRED OUTCOME	e.g. 'Automate 5 manual processes and reduce average ticket resolution time by 20% by Q4'
EXECUTIVE SPONSOR	Name and role of the exec whose objectives this investment directly supports

THE BUSINESS CASE

1 Problem Name the specific gap. Not 'we need help' — but the exact backlog count, blocked project, or deferred initiative.	2 Impact Quantify the business cost: deferred savings, risk exposure, delayed delivery. What is the status quo costing?
3 Solution Partner engagement, FTE, or both? Explain why this approach and what it will own. Start with what gets approved fastest.	4 ROI Show the math: investment vs. return. Even a conservative estimate is powerful when the payback is under 12 months.

SUPPORTING EVIDENCE

Current Backing Open items: _____ Avg age (days): _____ Est. annual backlog cost: _____	Blocked Projects Project / initiative: _____ Est. value blocked: \$ _____	Benchmarks Comparable org model: _____ Source (SNow Calc / Forrester): _____
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RESOURCE MODEL: PARTNER VS FTE

Partner Engagement ✓ Recommended starting point <ul style="list-style-type: none"> ✓ Scoped and time-bound — lower perceived risk ✓ No headcount impact on budget ✓ Delivers proof of value in weeks, not quarters ✓ Generates the data to justify the FTE later 	FTE Hire → Follow-on once evidence exists <ul style="list-style-type: none"> → Higher perceived risk — needs stronger evidence → Headcount approval often requires exec sponsor → ROI case must project 12-24 months out → Use partner delivery data to justify the hire
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ANTICIPATED OBJECTIONS

OBJECTION	YOUR RESPONSE
We can't approve an FTE right now.	Understood — we're not asking for one yet. A scoped partner engagement delivers proof of value first, without headcount impact.
We can do more with less.	Here's the math on what less is costing us: \$ _____ per quarter in deferred value. Doing nothing isn't free.
Let's revisit next budget cycle.	This engagement can start without headcount approval. Delay means [project X] slips another quarter — that's \$ _____ in deferred savings.