Make the case for your organisation.

Blank working template · complete with your team · no email required.

Strategic objective

Why now?

Accountable owner

Baseline → target → review date

Alternatives considered

Continue as-is; improve current tools; adopt selected People modules. Include effort and limitations.

Recommended first phase

Employees, modules, subscriptions to retire, systems to retain or integrate, optional services.

Conservative economics · first 12 months from project start

Measure	Amount / currency
Potential cash benefits	
Full incremental investment (cash + valued internal time)	
Net benefit after full investment	
Capacity released (hours, separate from cash)	
Cash payback, if calculable	

Downside case

What costs remain if adoption is slower or no savings materialise?

Approval requested

Show the workings.

Baseline, assumptions and sources

Record invoices, contract end / notice dates, measured workloads and the hiring plan. Distinguish customer inputs from illustrative assumptions.

Full investment

Incremental cost	Amount / status
Subscription and payment start	
Implementation, configuration and migration	
Integration setup and ongoing operation	
Training, adoption support and optional services	
Internal project time (hours × loaded hourly cost)	
Incremental sourcing and administration costs	
Extra transition / termination charges	

Existing contract overlap delays savings against the current-cost baseline; do not charge it twice. Deduct additional sourcing costs once. Blank costs remain unconfirmed.

Timing and scenarios

Project start; contract end dates; benefits start; adoption ramp; conservative / base / optimistic assumptions. Use consistent periods.

Delivery risks, mitigations and accountable owners

Scope, data preparation, integrations, testing, training, support and customer effort.

Milestones, benefits review and expansion criteria

Open items before approval