Business Case for Employee Experience Technology

[Business name, date]
[Your name, Job Title]

Executive Summary

- **Challenge/Problem/Current State**:
  - Highlight the business challenge you're looking to solve or the goal you're trying to achieve with an investment in the technology. Describe the current state, the pain, and the impact it has on both employees and the overall business.
- **Desired Outcome/Solution**:
  - Outline plan for how you will use the software to solve your problem and/or achieve your goals. Describe the desired state after the solution is implemented . Don't focus on describe the technology (features and functionality); instead, focus on what you are delivering to the business (the "user" experience).
- **Action Plan:**
  - **Benefits**: List tangible returns (e.g., time and money saved) and intangible returns (e.g., increased collaboration). Focus on the metrics that matter to your business (ROI, Time to Value, cost savings, etc.)
  - **Change management considerations:** List change management procedures you'll follow to ensure user adoption and establish metrics that measure results. Address the potential hurdles and risks.
  - **Cost**: List tangible costs (e.g., number of user licenses) and intangible costs (e.g., time required to implement new tool). Figure out who has the money in the company and consider combining budgets. Does it fit into other company initiatives, such as M&A activities, faster onboarding, and support of hybrid/remote/workplace changes? Outline the opportunity costs of doing nothing.
  - **Timeline**: Outline the expected timeline for implementing the new tool and ongoing support and maintenance.

Challenge

- **Overview of the problem**
  - Provide an explanation of the current business challenges or problems that you're looking to address with an investment in employee experience technologies.
- **Describe the current state**
  - Highlight the problems you're facing with the current situation that you'll leverage technology/software to solve.
- **Outline why it is critical to address this problem now**
  - Describe the impact the problem is having on both employees and the overall business.

Solution

- **Overview of solution**
  - Describe how you plan to use this technology to solve your problem and/or achieve your goals.
- **Describe the desired state after the solution is implemented**
  - Describe the desired state after the solution is implemented . Don't focus on describe the technology (features and functionality); instead, focus on what you are delivering to the business (the "user" experience).

Benefits

- **Tangible Returns**
  - Highlight the expected business benefits from investing in project management software, such as time and money saved, ability to scale /grow efficiently, and impact on business processes.
- **Intangible gains**
  - List benefits that are harder to quantify, such as increased employee satisfaction, improved productivity and employee retention.
- **Metrics for measuring success of investment**
  - Focus on the metrics that matter to your business (ROI, Time to Value, cost savings, etc.)

Change management considerations:

- **Change management process**
  - List change management procedures you'll follow to ensure user adoption and establish metrics that measure results.
- **Risks and potential obstacles**
  - Acknowledge typical change management risks and potential business hurdles and how you plan to minimize these risks in launching the new technology solution.

Costs

- **Tangible costs**
  - List the number and price of software licenses and implementation fees and how it fits into specific budget(s).
- **Intangible costs**
  - List costs that may be harder to quantify, such as time spent implementing a new technology or tool.
- **Total cost of ownership**
  - Figure out who has the money in the company and consider combining budgets. Does it fit into other company initiatives, such as M&A activities, faster onboarding, and support of the employee experience?

Timeline

- **Time required to evaluate and purchase software**
    - Estimate the evaluation process (identifying vendors, determining features needed, demoing solutions, and confirming the purchasing process).
- **Time required to implement new solution**
    - Estimate how long you'll spend implementing a new solution, promoting the new solution, driving usage and adoption, and maintaining/supporting the solution