

Business Case Template



<https://muban.me>

Automated Document Generation Implementation

Version: 1.0

Date: [Insert Date]

Prepared by: [Your Name]

Company: [Company Name]

How to Use This Template

This template helps you build a compelling business case for implementing automated document generation in your organization. Follow these steps:

Step 1: Gather Information

Before filling out this template, collect:

- Current document volumes and processing times
- Staff costs and time allocation
- Error rates and rework statistics
- Existing system information
- Budget constraints and approval requirements

Step 2: Complete Each Section

Work through the template sequentially:

1. **Replace all [placeholders]** with your actual data
2. **Delete sections** that don't apply to your situation
3. **Add company-specific details** where relevant
4. **Check all boxes ()** as you complete tasks

5. **Fill in all tables** with your financial data

Step 3: Customize for Your Audience

- **For C-Suite:** Focus on Executive Summary, ROI, and Strategic Alignment
- **For Finance:** Emphasize Section 3 (Financial Analysis)
- **For IT:** Highlight Technical Requirements and Integration details
- **For Department Heads:** Focus on Process Improvements and Timeline

Step 4: Review and Validate

- Verify all financial calculations
- Confirm timeline is realistic
- Check that metrics are measurable
- Ensure all stakeholders are identified

Step 5: Present and Gain Approval

Use the Approval section (Section 9) to obtain formal sign-off from key decision-makers.

Estimated Time to Complete: 4-8 hours (depending on data availability)

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Executive Summary

This business case evaluates the implementation of an automated document generation solution to replace manual document creation processes. The analysis demonstrates potential cost savings of **[XX%]** and efficiency improvements of **[XX hours/week]**, with an estimated ROI of **[XX months]**.

Key Recommendations

- ☐ Implement automated document generation for [specify document types]
- ☐ Begin with [pilot department/process]
- ☐ Scale to [additional areas] within [timeframe]

1. Current State Analysis

1.1 Document Volume

Document Type	Monthly Volume	Time per Document	Total Hours/Month
[e.g., Invoices]	[XXX]	[X min]	[XXX]
[e.g., Contracts]	[XXX]	[X min]	[XXX]
[e.g., Reports]	[XXX]	[X min]	[XXX]
[e.g., Proposals]	[XXX]	[X min]	[XXX]
Total	[XXX]	-	[XXX]

1.2 Current Process Challenges

- ☐ Manual data entry and formatting: **[XX hours/week]**
- ☐ Version control issues: **[XX incidents/month]**
- ☐ Error rate: **[XX%]**
- ☐ Bottlenecks in [department/process]: **[X days delay]**
- ☐ Compliance risks: **[describe]**
- ☐ Customer satisfaction impact: **[score/feedback]**

1.3 Current Costs

Personnel Costs:

- Staff time on document creation: $[XX \text{ hours/month}] \times [\$XX/\text{hour}] = \$[XXX]/\text{month}$
- Quality review and corrections: $[XX \text{ hours/month}] \times [\$XX/\text{hour}] = \$[XXX]/\text{month}$
- Management oversight: $[XX \text{ hours/month}] \times [\$XX/\text{hour}] = \$[XXX]/\text{month}$

Error & Rework Costs:

- Estimated errors: $[XX/\text{month}] \times [\$XX \text{ per error}] = \$[XXX]/\text{month}$
- Customer complaints: $[XX/\text{month}] \times [\$XX \text{ per incident}] = \$[XXX]/\text{month}$

Opportunity Costs:

- Delayed sales cycles: $\$[XXX]/\text{month}$
- Staff capacity for strategic work: $\$[XXX]/\text{month}$

Total Current Monthly Cost: $\$[XXX]$

Annual Cost: $\$[XXX]$

2. Proposed Solution

2.1 Solution Overview

Implement Muban automated document generation platform to:

- Generate documents from templates and data sources
- Ensure consistent branding and compliance
- Integrate with existing systems (CRM, ERP, databases)
- Support multiple formats (PDF, Excel, Word, HTML)
- Provide audit trails and version control

2.2 Implementation Scope

Phase 1 (Months 1-2): **Pilot**

- Document types: [List 2-3 high-value documents]
- Department: [Department name]
- Expected volume: [XXX documents/month]

Phase 2 (Months 3-4): **Expansion**

- Additional document types: [List]
- Additional departments: [List]
- System integrations: [List systems]

Phase 3 (Months 5-6): **Full Deployment**

- All document types: [Total number]
- Organization-wide rollout
- Advanced features: [List]

2.3 Technical Requirements

- ☐ Template design and configuration
- ☐ Data source integration
- ☐ User training and documentation
- ☐ Testing and quality assurance
- ☐ Security and compliance setup

3. Financial Analysis

3.1 Implementation Costs

One-Time Costs:

Item	Cost
Software setup & configuration	[\$XXX]
Template development	[\$XXX]
System integration	[\$XXX]
Data migration	[\$XXX]
Staff training	[\$XXX]
Total One-Time	[\$XXX]

Ongoing Costs (Monthly):

Item	Cost
Platform subscription	[\$XXX]
Support & maintenance	[\$XXX]
Template updates	[\$XXX]
Total Monthly	[\$XXX]
Annual	[\$XXX]

3.2 Expected Benefits & Savings

Time Savings:

- Automation efficiency: [XX%] reduction in document creation time
- Monthly time saved: [XXX hours]
- Annual labor cost savings: \$[XXX]

Error Reduction:

- Expected error rate reduction: [XX%]
- Annual error cost savings: \$[XXX]

Process Improvements:

- Faster turnaround time: [X days → Y days]
- Increased capacity: [XXX additional documents/month]
- Revenue opportunity: \$[XXX]/year

Compliance & Risk:

- Reduced compliance violations: \$[XXX]/year
- Improved audit readiness: [quantify if possible]

Total Annual Benefit: \$[XXX]

3.3 ROI Calculation

Total Implementation Cost: \$[XXX]
 Annual Net Savings: \$[XXX] (Benefits - Ongoing Costs)
 Payback Period: [XX] months
 3-Year ROI: [XXX%]
 5-Year ROI: [XXX%]

3.4 Cost-Benefit Summary (5 Years)

Year	Investment	Benefits	Net Savings	Cumulative
Year 1	[\$XXX]	[\$XXX]	[\$XXX]	[\$XXX]
Year 2	[\$XXX]	[\$XXX]	[\$XXX]	[\$XXX]
Year 3	[\$XXX]	[\$XXX]	[\$XXX]	[\$XXX]
Year 4	[\$XXX]	[\$XXX]	[\$XXX]	[\$XXX]
Year 5	[\$XXX]	[\$XXX]	[\$XXX]	[\$XXX]

5-Year Total Net Benefit: \$[XXX]

4. Risk Analysis

4.1 Implementation Risks

Risk	Probability	Impact	Mitigation Strategy
Technical integration challenges	Medium	High	Phased approach, expert support
User adoption resistance	Medium	Medium	Change management, training
Data quality issues	Low	Medium	Data audit before migration
Timeline delays	Medium	Low	Buffer time, clear milestones
Cost overruns	Low	Medium	Fixed-price contracts, monitoring

4.2 Risk of Inaction

If we maintain current manual processes:

- ☐ Continued labor costs: \$[XXX]/year
- ☐ Growing error rates as volume increases
- ☐ Competitive disadvantage
- ☐ Staff burnout and turnover
- ☐ Scalability limitations
- ☐ Compliance risks

5. Strategic Alignment

5.1 Business Objectives Supported

- ☐ Digital transformation initiative
- ☐ Operational excellence goals
- ☐ Cost reduction targets: [XX%]
- ☐ Customer experience improvements
- ☐ Compliance and risk management
- ☐ Scalability for growth

5.2 Success Metrics

Key Performance Indicators:

KPI	Baseline	Target (6 months)	Target (12 months)
Document processing time	[XX min]	[XX min]	[XX min]
Error rate	[XX%]	[XX%]	[XX%]
Documents/FTE/month	[XXX]	[XXX]	[XXX]
Customer satisfaction	[X.X/10]	[X.X/10]	[X.X/10]
Processing cost per document	[\$XX]	[\$XX]	[\$XX]

6. Implementation Plan

6.1 Timeline

Month 1-2: Planning & Setup

- Week 1-2: Requirements finalization
- Week 3-4: Platform setup
- Week 5-6: Template development
- Week 7-8: Integration & testing

Month 3-4: Pilot Deployment

- Week 9: User training
- Week 10-12: Pilot with [department]
- Week 13-16: Feedback & optimization

Month 5-6: Full Rollout

- Week 17-20: Organization-wide deployment
- Week 21-24: Optimization & support

6.2 Resource Requirements

Project Team:

- Project Manager: [X hours/week]
- Technical Lead: [X hours/week]
- Business Analyst: [X hours/week]
- Department Representatives: [X hours/week]

Vendor Support:

- Implementation consultant: [X days]
- Training specialist: [X days]
- Ongoing support: [describe]

7. Alternative Analysis

7.1 Option Comparison

Criteria	Status Quo	Build In-House	Muban Solution
Initial Cost	\$0	[\$XXX]	[\$XXX]
Time to Value	N/A	12-18 months	2-3 months
Ongoing Cost	[\$XXX]/year	[\$XXX]/year	[\$XXX]/year
Risk	High	High	Low
Scalability	Poor	Good	Excellent

Criteria	Status Quo	Build In-House	Muban Solution
Maintenance	N/A	High burden	Vendor managed
Recommendation	NO	CAUTION	YES

7.2 Why Muban?

- Proven platform with [X] enterprise customers
- Rapid deployment: [X months vs X months]
- Comprehensive support and training
- Regular updates and improvements
- Compliance certifications: [list]
- Scalable pricing model

8. Recommendation

8.1 Go/No-Go Decision

Recommended Action: PROCEED with implementation

Rationale:

1. **Strong Financial Case:** [XX%] ROI with [XX month] payback
2. **Strategic Fit:** Aligns with digital transformation goals
3. **Manageable Risk:** Phased approach with proven technology
4. **Competitive Necessity:** Industry standard for document automation
5. **Scalable Solution:** Supports future growth

8.2 Next Steps

Immediate Actions:

1. ☐ Secure budget approval: **\$(XXX)**
2. ☐ Form project team (by [date])
3. ☐ Engage vendor for detailed scoping (by [date])
4. ☐ Finalize requirements and timeline (by [date])

Month 1:

- ☐ Kick-off meeting
- ☐ Technical environment setup
- ☐ Begin template development

Month 2:

- ☐ Complete pilot setup
- ☐ User training
- ☐ Begin pilot testing

9. Appendices

Note: All appendices are **optional** and should be included only if:

- Information is readily available
- No NDA or confidentiality restrictions apply
- Additional detail strengthens your business case
- Stakeholders require supporting documentation

You may omit any or all appendices without affecting the core business case. Include only what adds value to your specific situation.

Appendix A: Document Inventory

[Detailed list of all document types, volumes, and complexity]

Appendix B: Process Flow Diagrams

[Current state vs. future state process maps]

Appendix C: Technical Architecture

[System integration diagram]

Appendix D: Vendor Evaluation

[Comparison matrix of evaluated solutions]

Appendix E: User Testimonials

[Case studies from similar organizations]

Approval

Role	Name	Signature	Date
Project Sponsor			
Finance Director			
IT Director			
Department Head			

Document Control:

- **Created:** [Date]
- **Last Updated:** [Date]
- **Next Review:** [Date]
- **Classification:** [Internal/Confidential]

Additional Resources

For implementation support and more information:

- Email: contact@muban.me
- Website: <https://muban.me>
- Schedule consultation: <https://muban.me/about.html>