

GUIDE

How to Build a Business Case in 7 Steps

A Practical Pocket Guide for Creating Stronger, More Credible Business Cases

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Winning deals today requires more than a strong solution. Buyers—especially CFOs and decision-making committees—need clear financial justification before they move forward. They want proof that your solution will deliver measurable business impact, not just promises or product features.

That is where a strong business case becomes essential. A credible business case helps buyers understand the value of your solution in practical, financial terms. It reduces uncertainty, builds confidence, and gives internal champions the evidence they need to secure approval.

The challenge is that many business cases fall short. They rely on vague assumptions, inflated ROI claims, or disconnected spreadsheets that create more skepticism than trust.

The strongest business cases do the opposite. They are clear, transparent, realistic, and aligned to the buyer's priorities. They move the conversation from "why your product" to "why this investment makes business sense."

This pocket guide walks through the seven essential elements every strong business case should include.



STEP ONE

Start with the Problem or Opportunity

Before discussing solutions, define what needs to change. A strong business case begins with a clear statement of the problem, challenge, or opportunity facing the buyer. This creates urgency and gives your proposal context.

Ask:

- What business issue are they trying to solve?
- What happens if they do nothing?
- What opportunity are they missing?
- What goals need to be achieved?
- What challenges need to be overcome?

This should be tied to strategic priorities, not just operational irritations. For example, reducing proposal turnaround time matters because it improves win rates, increases capacity, and drives revenue, not simply because the current process is frustrating. When the business problem is clearly defined, the rest of the case becomes easier to justify.

STEP TWO

Make Your Assumptions Transparent

Trust disappears when the math feels murky. Buyers need to understand how you arrived at your conclusions. Hidden formulas, vague estimates, and generic benchmarks create doubt. Strong business cases clearly show:

- Data sources
- Key assumptions
- Adoption rates
- Baseline costs
- Expected operational changes

Transparency builds credibility. Buyers are far more likely to trust conservative, visible assumptions than aggressive claims they cannot verify.

Pro Tip: Involve client stakeholders early to validate assumptions together. Collaboration improves both accuracy and buy-in.

STEP THREE

Quantify the Benefits

This is the heart of the business case. Buyers want measurable outcomes tied directly to business value. That means translating your solution into financial and operational impact. Strong business cases quantify benefits such as:

- Cost reduction
- Revenue growth
- Efficiency gains
- Risk reduction
- Time savings
- Margin improvement

The key is specificity. Instead of saying: “Our solution improves productivity,” say, “Our solution reduces proposal creation time by 50%, allowing your team to respond to more high-value opportunities without adding headcount.” The more concrete the outcome, the stronger the case.

STEP FOUR

Include All Costs

A credible business case never ignores the investment side. Buyers want the full picture, not selective math. That includes:

- Implementation costs
- Licensing or subscription fees
- Internal resource requirements
- Training and onboarding
- Ongoing maintenance or support

If costs are hidden or minimized too aggressively, trust erodes quickly. Honest, complete cost visibility strengthens your position because it shows confidence and reduces surprises later.

Remember: Buyers are not looking for the cheapest option. They are looking for the best investment decision.

STEP FIVE

Address Risks and Mitigation

Acknowledging risk often strengthens your credibility. Strong business cases identify:

- Adoption challenges
- Change management barriers
- Market or operational uncertainty
- Resource constraints

Then, just as importantly, they explain how those risks will be managed. This might be through phased rollout plans, training support, sponsorship or success tracking dashboards. Whatever it may be, addressing risks doesn't weaken your case. It proves foresight.

STEP SIX

Show the ROI Clearly

Different stakeholders care about different financial measures. Your business case should make the return obvious using familiar financial models. The three most common are:

- **Payback period:** How long it takes for benefits to cover costs. Simple, but doesn't capture long-term value.
- **Net Present Value (NPV):** The total value today of future benefits, discounted to reflect time and risk. Widely respected by CFOs.
- **Internal Rate of Return (IRR):** The effective annual return delivered by the investment. Useful for comparing projects of different sizes.

Your job is to make the numbers easy to defend internally. Using multiple measures shows rigor, improves credibility and helps different stakeholders evaluate the decision with confidence.

STEP SEVEN

Deliver an Executive-Ready Summary

Even the best analysis can fail if it is difficult to understand. Decision-makers need clarity, not complexity. Your business case should end with a concise, executive-friendly summary that includes:

- The business problem
- The projected benefits
- The investment required
- The expected ROI
- Key risks and mitigation
- Why action should happen now

Visual dashboards, summary tables, and clean presentation formats make a major difference. If executives cannot quickly understand and repeat the value story, the case is not finished.



Quick Checklist: 7 Things Every Strong Business Case Must Include

Use this as your final review before presenting your case.

- Clear statement of the problem or opportunity
- Transparent assumptions and data sources
- Quantified and customer agreed benefits with realistic time scales
- Full costs, including implementation and ongoing investment
- Risk assessment and mitigation plan
- ROI calculations (NPV, IRR, and Payback)
- Executive-ready summary with visual outputs

About QorusDocs

QorusDocs helps organizations prove value early and win more business with AI-powered proposal management and integrated Value Management tools.

From building credible business cases to creating personalized proposals, pitches, and RFP responses, QorusDocs helps sales, business development, and proposal teams move faster, reduce manual work, and improve win rates.

See how QorusDocs helps teams create stronger business cases and faster, more persuasive proposals that consistently win.

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