



# Business case

## Guide



# Why a strong business case is essential

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Executive teams don't just need a price tag. They want to understand why you need the investment, what outcomes it will drive and how it aligns with broader business goals.

A solid business case should demonstrate:

- ↖ Operational savings
- ↖ Risk reduction
- ↖ Efficiency gains
- ↖ Strategic alignment
- ↖ ROI and long-term value

# Why a strong business case is essential

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## Understand what your stakeholders need

Different decision-makers focus on different outcomes.  
Tailor your message accordingly:

**Finance** is looking for cost transparency, spend control, and return on investment

**IT** is focused on data security, integration capability, and technical support

**Executives & Directors** want to see efficiency, strategic growth potential, and risk mitigation

Despite differing responsibilities, all stakeholders typically value:



Cost control



Operational efficiency



Risk reduction



Scalable technology that supports digital transformation

# Common challenges to gaining budget approval

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Many CAFM initiatives fail before implementation because of:

- ✚ Poorly defined requirements
- ✚ Excessive complexity
- ✚ Insufficient staff training
- ✚ Low adoption

Other common blockers include:



Vague  
priorities



Budget  
constraints



Change  
resistance



Weak or overly  
technical  
business case

# Writing a high impact business case

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To resonate with executives and secure funding, your case needs to be strategic, focused, and clear

## Top writing tips

**Start with the why:** Explain the problem or inefficiency.

**Be direct:** Avoid jargon and get to the point.

**Tell a story:** Lead with a narrative that shows transformation.

**Use data:** Reference industry trends and real examples.

**Add visuals:** Use dashboards, graphs, and screenshots to bring it to life.

**Show the ROI:** Quantify potential cost and time savings.

# 1. Suggested structure

## Executive summary

Use the “NOSE” format:

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### Needs

What problems are you solving?

### Outcome

What results are you targeting?

### Solution

What tool or system are you proposing?

### Evidence

What data backs this up?

## 2. Define the problem

Clearly outline current inefficiencies, such as:

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Disconnected systems

High admin load

Manual tracking

Slow response times

Compliance risks

Lack of visibility into FM  
performance or spending

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## Present your recommended solution

Explain how the chosen CAFM platform solves the problems. Include:

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Key features

Integration potential

Vendor credentials

Scalability

Support and SLAs



## 4. Highlight the benefits

Group them into  
key themes:

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### Time savings

Automating repetitive tasks.

### Cost control

Fewer callouts, optimised  
service management.

### Risk mitigation

Better compliance and  
documentation.

### Performance uplift

Increased first-time fix rate,  
improved reporting.

## 5. Financial impact

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Estimate savings  
and value

Reduced reactive  
maintenance costs

Longer asset lifecycle  
through better planning

Better spend forecasting

Reduced compliance fines  
or overspending

# Project timeline

## Key milestones

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### Discovery and scope

Finalise exact scope through to workshops to create detailed project plan.



### DATE: Data management

Understand all data that needs migrating - Assess data quality and clean up.



### DATE: Design

Agree Concerto configuration in detail, and areas of bespoke set up.



### DATE: Testing

User acceptance training before site moved out of UAT.



### DATE: Training

In-depth user training in-person; videos and guides.



### DATE: Optimisation

Post roll out support - User behaviour and adoption monitoring - Continuous feedback.

# What happens if we don't act

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Digitally transform  
facilities operations



Empower FM and IT  
teams with real-time  
insight

## Leave them with a clear takeaway

This isn't just a software purchase.  
It's a business-critical investment. A  
well-chosen CAFM system will:



Support better  
financial oversight



Reduce risk, improve  
service, and drive cost  
efficiency



# Book your demo

01925 989 500

[hello@concerto.co.uk](mailto:hello@concerto.co.uk)