







Guide

### Why a strong business case is essential

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

#### 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



efficiency





Risk reduction

Scalable technology that supports digital transformation

## Common challenges to gaining budget approval

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

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:

#### 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:

Disconnected systems

High admin load

Manual tracking

Slow response times

Compliance risks

Lack of visibility into FM performance or spending

## 3. Present your recommended solution

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

Key features

Integration potential

Vendor credentials

Scalability

Support and SLAs

# 4. Highlight the benefits

Group them into key themes:

#### Time savings

Automating repetitive tasks.

#### Risk mitigation

Better compliance and documentation.

#### Cost control

Fewer callouts, optimised service management.

#### Performance uplift

Increased first-time fix rate, improved reporting.

### 5. Financial impact

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



#### Discovery and scope

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



**DATE: Testing** 

User acceptance training before site moved out of UAT.



#### DATE: Data management

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



#### DATE: Training

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



#### **DATE:** Design

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



#### **DATE:** Optimisation

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

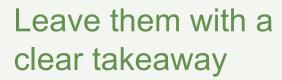
### What happens if we don't act



Digitally transform facilities operations



Empower FM and IT teams with real-time insight



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

