[trust logo]

High-level business case template and guidance

[editable template]

Contents

[1. Executive summary 2](#_Toc525821432)

[2. Vision for corporate services 3](#_Toc525821433)

[3. The preferred model 5](#_Toc525821434)

[4. Service model detail 8](#_Toc525821435)

[Appendices 11](#_Toc525821436)

[A1. Baseline position and data 12](#_Toc525821437)

[A2. Modelling assumptions 13](#_Toc525821438)

[A3. Interim model detail 14](#_Toc525821439)

[A4. Project roadmap 15](#_Toc525821440)

# 1. Executive summary

## 1.1. High-level benefits

## 1.2. Proposed service model

## 1.3. Alternative delivery options considered

## 1.4. Project roadmap

## 1.5. Risk

# 2. Vision for corporate services

## 2.1. Strategic objectives

## 2.2. Design principles

|  |
| --- |
| **Commentary** |

## 2.3. Delivery options identified

**Single corporate service function**

|  |  |  |  |
| --- | --- | --- | --- |
| Service sub-function | Retain in house | Outsource | Share with other trusts |
| Service 1 |  |  |  |
| Service 2 |  |  |  |
| Service 3 |  |  |  |

**Corporate services across multiple trusts**

|  |  |  |  |
| --- | --- | --- | --- |
| Design principle | Retain in house | Outsource | Share with other trusts |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

|  |
| --- |
| **Commentary** |

# 3. The preferred model

## 3.1. Key features

### 3.1.1. Key features of preferred model

* …
* …
* …
* …
* …

### 3.1.2. How preferred model meets the strategic objectives and design principles for corporate services

* …
* …
* …
* …
* …

### 3.1.3. Key reasons for the model is preferred compared to the alternatives considered

* …
* …
* …
* …
* …

## 3.2. Evaluation of delivery options (summary)

|  |  |  |  |
| --- | --- | --- | --- |
| Evaluation category | Option 1 | Option 2 | Option 3 |
| Costs  |  |  |  |
| Benefits |  |  |  |
| Risks |  |  |  |
| Key changes |  |  |  |

|  |
| --- |
| **Commentary** |

## 3.3. Overview of preferred/delivery option

### 3.3.1. Benefits

### 3.3.2. Costs

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Total |
| **Costs** |  |  |  |  |  |  |
| **Benefits** |  |  |  |  |  |  |
| **Net cost/benefit** |  |  |  |  |  |  |

**Please refer to the assumptions in Appendix A2 that underpin this analysis.**

### 3.3.3. Key changes

### 3.3.4. Risks

# 4. Service model detail

## 4.1. End-state service model

|  |
| --- |
| **Commentary** |

## 4.2. Process view of service model

|  |
| --- |
| **Commentary** |

## 4.3. Organisation chart

|  |
| --- |
| **Commentary** |

## 4.4. Performance measures

|  |  |  |  |
| --- | --- | --- | --- |
| Function/sub-function | KPI or other measure | Target | Purpose |
| Core payroll | Payroll to be processed within X days | 95% | Efficiency of service |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

|  |
| --- |
| **Commentary** |

## 4.5. Systems

|  |
| --- |
| **Commentary** |

## 4.6. Resourcing (and location if relevant)

|  |
| --- |
| **Commentary** |

# Appendices

|  |  |  |
| --- | --- | --- |
| Section | Appendix | Page |
| A1 | Baseline position and data |  |
| A2 | Modelling assumptions |  |
| A3 | Interim model detail (if this is required before being able to move fully to the end model) |  |
| A4 | Project roadmap and transition plan, and RACI Matrix |  |

# A1. Baseline position and data

# A2. Modelling assumptions

# A3. Interim model detail

# A4. Project roadmap

## A4.1. Project roadmap

|  |
| --- |
| **Commentary** |

## A4.2. High-level transition plan

|  |
| --- |
| **Commentary** |

A4.3. RACI matrix

|  |
| --- |
| **Commentary** |