Date:

Created by:

Revised:

OBJECTIVE

The overall business objective is something you might surface to a c-level executive. It should explain only the objective—not how to do it. Make it short and sweet and easily understandable.

Example: Add burritos to the rotation of weekly team lunches one time per month.

Timeline: Your deadline.

BUSINESS CASE

List in bullet points the reasons why this project makes good business sense. These reasons form the success measures.

Example:
- Studies show that employee satisfaction increases by 25% after eating a delicious company-provided burrito.
- We're currently in a period of high employee churn and need tactics to reduce the number of new positions we need to fill.
- B2B tech companies that provide burritos to employees have reduced employee churn by 55%.
- Employees ask for burritos twice as often (2:1) as they ask for other team lunch options.

BUSINESS REQUIREMENTS

Current business process

Describe how the current business process supports the proposed project. Include visualizations or diagrams of the business process.

Example:
Currently the business supports a weekly team lunch but only offers cold sandwiches. Lunch purchases are made by the administrative assistant at 10:00 a.m. every Wednesday, the food arrives at 11:00 a.m., and at 12:00 p.m. the team gathers in the kitchen to eat.

Changes to business process

List clearly and specifically the changes to occur if the objective is attained. Again, this should not outline how to accomplish the objective, merely how the business process will change.

Example:
- Burritos are a hot lunch and they need to be served hot; the team expects that this may affect lunch time or the administrative assistant's ordering schedule.

Impact on metrics & reporting

Outline and highlight anticipated changes to reporting. Even if there are none, say so explicitly. Don't skip this section. No need to project anticipated numbers; merely describe whether existing reporting or the methods of reporting will be affected.

Example:
Because weekly lunch is already accounted for in the budget and in expense reports, this change should not affect metrics and reporting.

CHANGE MANAGEMENT

Detail the teams that need to sign off and who is responsible for managing the change.

Example:
- The operations director will work with the administrative assistant to select a vendor and adjust the ordering schedule.
- The administrative assistant will communicate the changes to the team's lunch schedule.

RISKS

Detail any major risk factors foreseen by the project team.

Example:
- The cost of burritos might exceed the team lunch budget.
- Poorly timed burrito delivery might result in a suboptimal team lunch experience.

APPROVALS

Role	Name	Title	Signature	Date
Project Sponsor				
Business Owner				
Project Manager				
System Architect				
Development Lead				
User Experience Lead				
Quality Lead				
Content Lead				

USER STORIES

A user story states what a project or objective means to an individual team member. It is always a single, easy-to-understand sentence written from the perspective of the individual. A collection of user stories can help show the broader value of the project to the organization.

Team member—I am a team member and I need to eat burritos on a regular basis to be my most productive, and I would think highly of a company that provided burritos.

HR Director—I am the HR Director, and I am looking for ways to better engage employees and reduce churn.