Writing Persuasively to Build a Better Business Case for Your Library

Canadian Association of Law Libraries

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Business Case – Definition

- Captures the reasons for initiating a project or task
- Written document, presentation, pitch
- The logic of the business case is that whatever resources are required, they must support the specific need.

Business Case – Perspective

- A software upgrade might improve system performance.

- The "business case" is that better performance would improve customer satisfaction, require less processing time, or reduce system maintenance costs.

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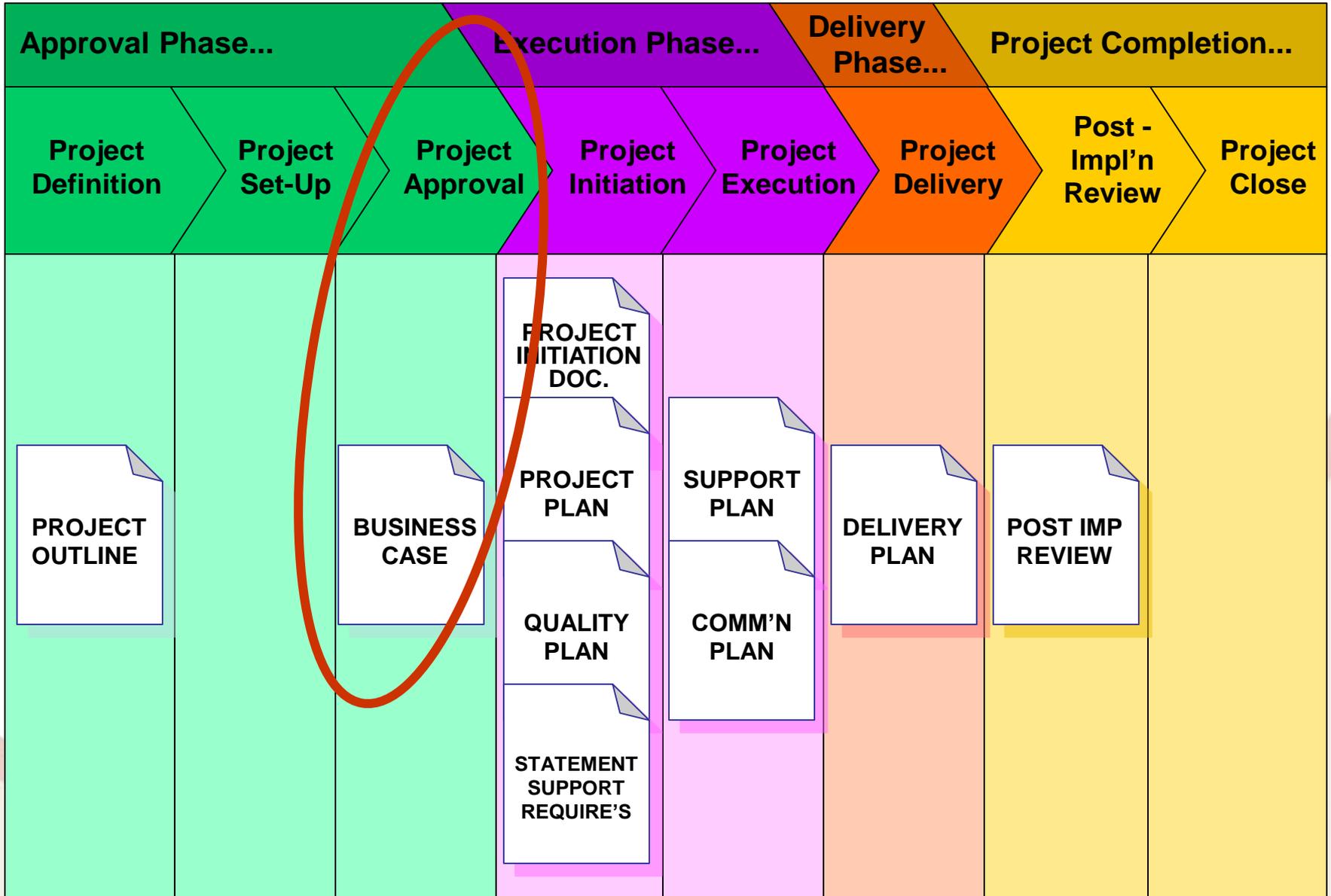COMMUNICATIONS

Business Case – Essential Tool

- An essential part of project selecting and scoping
- Require making assumptions explicit
- Use arguments of facts, faith, and fear
- Set the direction and support for projects

Business Case – Essential Tool

Business Cases

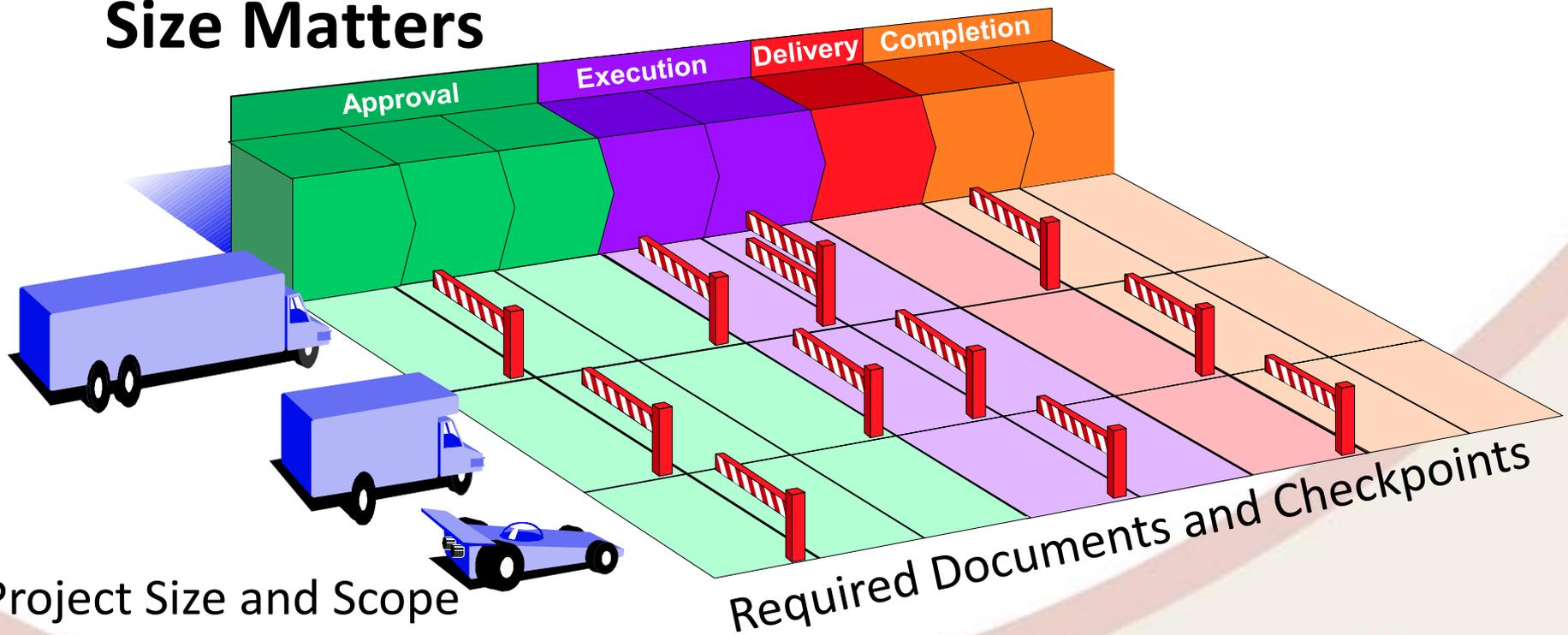- Establish ownership

- Set boundaries

- Strongly influence relationships

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Business Case – Process

Approval Phase...			Execution Phase...		Delivery Phase...	Project Completion...	
Project Definition	Project Set-Up	Project Approval	Project Initiation	Project Execution	Project Delivery	Post - Impl'n Review	Project Close
PROJECT OUTLINE		BUSINESS CASE	PROJECT INITIATION DOC. / PROJECT PLAN / QUALITY PLAN / STATEMENT SUPPORT REQUIRE'S	SUPPORT PLAN / COMM'N PLAN	DELIVERY PLAN	POST IMP REVIEW	

Business Case – Process

Size Matters

Approval · Execution · Delivery · Completion

Project Size and Scope

Required Documents and Checkpoints

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Business Case – Bounded Rationality

Three bases of successful arguments

- Facts
- Faith
- Fear

Business Case – Bounded Rationality

Fact

- "The system will eliminate the need for hiring two positions for an annual savings of $100K."

- Justify using hard data, quantitative, structured feasibility assessment.

Target Audience: "Sensing"

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Business Case – Bounded Rationality

Faith

- "XX is infrastructure. We need it to support our growth and stability."
- Justify by vision. Investment **X** will lead to benefit **Y**.

Target Audience: "i**N**tuitives"

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Business Case – Bounded Rationality

Fear

- "If we don't do this we may be eaten alive by our competition."

- Justify by perception of events.

Target Audience: "i**N**tuitives"

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Business Case – Key Elements

- Bring confidence and accountability into decision-making

- Show the compilation of all information collected during analysis and the business case process

- Provide evidence and justification for launching or continuing

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Business Case – Structure

- Preface

- Table of Contents

- Executive Briefing
  - Recommendation

  - Summary of Results

  - Decision to be Taken

Business Case – Structure

Recommended structure

- Introduction
  - Project Drivers
  - Scope
  - Financial Metrics

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Business Case – Structure

- Analysis
  - Assumptions
  - Cash Flow Statement
  - Costs
  - Benefits
  - Risk
  - Strategic Options
  - Opportunity Costs

- Conclusion, Recommendation(s), and Next Steps
- Appendix
- Review and approval

Business Case – Ongoing

At various stages, the business case should be reviewed to ensure

- Justification is still valid
- Project will deliver the solution to the business need
- Result of a review may be the termination or amendment of the project

Business Case – Remember

Before you begin writing

- Know who your stakeholders are
- Analyze the risks and returns

Business Case – Tell a Story

Start with a message

- Who is my audience?

- What is the message I want to share with them?

Leaders should ask

- What is the core moral/lesson that I'm trying to implant in my team?

- How can I boil that down to a compelling single statement?

Business Case – Tell a Story

- If your team is behaving as if failure is not an option, you might decide to impart the message that failure is actually the key to success

- If you are trying to convince senior leaders to take a risk by supporting your project, you could demonstrate how other organizations take smart chances

Business Case – Tell a Story

First, settle on your ultimate message; **then** you can figure out the best way to illustrate it.

Business Case – Tell a Story

Mine your own experiences

- What events in your life make you believe in the idea you are trying to share?
  - Think of a moment in which your own failures led to success in your career, or
  - Think of a lesson that a parent or mentor taught you

Business Case – Tell a Story

Don't make yourself the hero

- That said, don't make yourself the star of your own story. You'll lose your audience's attention.

Business Case – Tell a Story

Highlight a struggle

- A story without a challenge isn't very interesting.
- A good story needs conflict.
  - Is there a competitor that needs to be bested?
  - A market challenge that needs to be overcome?
  - A change-resistant industry that needs to be transformed?
- Don't be afraid to suggest the road ahead will be difficult.

Business Case – Tell a Story

Keep it simple

- Don't let needless details detract from your core message.
  - Not every story you tell has to be a surprising, edge-of-your-seat epic.
  - Some of the most successful and memorable stories are relatively simple and straightforward.

Business Case – Tell a Story

Practice makes perfect

- Storytelling is a "real art form"
- Stories are the original viral tool

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Business Case – Tell a Story

Principles to Remember

Do:

- Consider your audience – choose a framework and details that will best resonate with your listeners.

- Identify the moral/lesson you want to impart.

- Find inspiration in your life experiences.

Business Case – Best Practices

- Present the business case in two stages. First, produce a two-page outline. If this "mini business case" survives the first rounds of scrutiny, create a longer document that delves into cost-benefit details.

- Develop a high-level time line with project milestones. Outline and describe strategies for dealing with and mitigating as many risk factors as possible.

Business Case – Best Practices

- Outline three different scenarios (such as best case, worst case and most likely case), including cost, time line and ROI particulars of each.

- Prepare a multifaceted ROI analysis, including a detailed breakdown of costs (for hardware, software, consulting, training, support and other costs) and cash flow throughout the lifecycle of the project.

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Business Case – Best Practices

- Include soft benefits. Intangibles often sway the outcome.

- Identify the type of value the project will deliver: cost reduction, revenue generation, competitive advantage, risk reduction or regulatory compliance. These categories give decision-makers context that aids in making their decision.

XYZ: Original

XYZ University's strategic plan is designed to amplify the university's academic excellence. The result of a 13-month planning effort, the plan identifies strategies to enhance the university's work for students on three fronts:

- Reinterpreting the liberal arts skills of communication and critical thinking to take into account 21st-century challenges and opportunities

- Multiplying connections between students and faculty members by building on the faculty's record of original research and creativity

- Building on XYZ University's strong sense of community, locally and globally

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XYZ: Final

Within a decade, if all goes according to plan, XYZ University will emerge as the top school in its class, leaving behind our "peer schools" of today. Admittedly, the plan is ambitious. And it won't be cheap: excellence in education at this level never is. But we will get there, thanks to your vision, your commitment, and your help.

Original: Readability Indices

Flesch Kincaid Reading Ease   -10.4

Flesch Kincaid Grade Level   25.8

Gunning Fog Score   28.1

SMOG Index   21.1

Coleman Liau Index   18.3

Automated Readability Index   28.1

OVERALL SCORE   24.3

Original: Text Statistics

No. of sentences   2

No. of words   89

No. of complex words   27

Percent of complex words   30.34%

Average words per sentence   44.50

Average syllables per word   2.03

Final: Readability Indices

Flesch Kincaid Reading Ease	-10.4	65.7
Flesch Kincaid Grade Level	25.8	7.8
Gunning Fog Score	28.1	10.0
SMOG Index	21.1	7.8
Coleman Liau Index	18.3	10.2
Automated Readability Index	28.1	6.8
OVERALL SCORE	**24.3**	**8.5**

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Final: Text Statistics

No. of sentences	2	4
No. of words	89	59
No. of complex words	27	7
Percent of complex words	30.34%	11.86%
Average words per sentence	44.50	14.75
Average syllables per word	2.03	1.49

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Business Case – Pitch Your Idea

- Without a winning delivery, even the best-laid business plans are at a disadvantage.

- A memorable presentation transforms "numbers on a page" into something more tangible.

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Business Case – Pitch Your Idea

- Craft an emotional story
- Lead with the need
- Address your audience's concerns
- Find the right medium for your message
- Don't forget to connect
- Have an elevator pitch ready

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Business Case – Best Practices

Do:

- Tell a story – it will make your case more persuasive and memorable

- Spell out the business need – it gives the audience a reason to listen

- Have both a short and long version ready – you never know how much time you or your reader will have

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Business Case – Best Practices

Don't:

- Overlook stakeholders' pet concerns – address them directly to win allies

- Overwhelm your audience with needless detail

- Forget to make a rational and emotional appeal

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Thank you!

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Source: https://hbr.org/2014/07/how-to-tell-a-great-story

Source: Blechman, Nicholas, Harvard Business Review

Source: https://en.wikipedia.org/wiki/Business_case

Source: https://www.cio.com/article/2439835/business-alignment/making-the-business-case-for-it--best-practices.html

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