



TOOL 2.6



Business Case Worksheet

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BUSINESS CASE

WORKSHEET

Real HR transformation begins by responding to the general business conditions and specifically serving key stakeholders. When HR professionals start by thinking about the outcomes of the work as defined by the business context, they change their conversations with line managers and are able to better justify why an HR transformation should occur.

These types of discussions take many HR people out of their traditional comfort zones. They must learn to understand and diagnose business context settings as business leaders. HR professionals need to grasp general economic conditions, specific industry trends, customer and competitor moves, and regulatory and technological environments. They need to position HR transformation as a response to real and future business problems. They need to use data about external realities and not intuition to justify the transformation. HR professionals need to partner with marketing, finance, and other staff groups to obtain data that will inform the rationale for seeking transformation.

In addition, in building the rationale for transformation, they will want to pay attention to the risks of not doing it. If the transformation does not, what will happen to their ability to respond to general business conditions and key stakeholder expectations? They will also want to recognize how HR transformation fits with other initiatives in the company. This means building the case for HR transformation as a priority in the midst of other competing demands.

Directions:

Have each member of the HR transformation team complete this worksheet, by answering the following questions, prior to your business case development meeting.

(see [worksheet](#) on next page)

Example Worksheet

XYZ Corporation

WHAT ARE THE THREE BIGGEST CHALLENGES OUR ORGANIZATION IS FACING?

We have been slow to respond to customer queries, unable to tailor our product and service offerings, and are too complex to do business with.

WHAT IS THE IMPACT OF THESE ON OUR THREE MOST IMPORTANT STAKEHOLDERS?

Investors-Our market value has decreased while our competitors has increased because we have lost more than our share of recent competitive bids to our competition.

WHAT TRANSFORMATIONS COULD HR MAKE THAT WOULD HELP STAKEHOLDERS ADDRESS THESE CHALLENGES?

We believe HR could help streamline our organization SO THAT we win more competitive bids, by (1) simplifying HR practices and by (2) helping to restructure our global matrix with a focus on strategic versus transactional work.

WHAT WOULD WE REASONABLY EXPECT THE IMPACT OF THESE CHANGES TO BE? HOW WOULD WE MEASURE IT?

We would expect a higher retention rate in emerging markets in winning competitive bids. We would measure the percentage increase of bids won over 30, 60, and 90 days.

WHY ARE WE DOING THIS TRANSFORMATIVE WORK?

We have lost more than our share of recent competitive bids to our competition. In analyzing why we have lost, we realize that we have been too slow to respond to customer queries, unable to tailor our product and service offerings, and too complex to do business with. We believe that an HR transformation will help us streamline our organization so that we achieve a higher success rate in winning competitive bids.

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WHAT WOULD WE REASONABLY EXPECT THE IMPACT OF THESE CHANGES TO BE? HOW WOULD WE MEASURE IT?

WHY ARE WE DOING THIS TRANSFORMATIVE WORK?

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