



Make every word count

Your step-by-step guide to creating a strong business case



**FIGHT
FOR EVERY
HEARTBEAT**

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Building your business case – step by step

Follow our step-by-step guide to creating your business case.

1.

Check the process before you begin

Talk to your line manager before starting. Find out where your business case needs to go when complete.

2.

Consider the audience and the key stakeholders

Decide who else needs to be involved or consulted, and identify who has the most to gain or lose from your proposal. Find out who will review the business case when complete.

3.

Plan the format of your business case

Find out whether there is a standard format to follow for your organisation or if there is an application form or mandatory requirements. If you don't have any, have a look at our business case template.

4.

Use the right language

Avoid using unnecessary jargon - it can obscure your message.

Keep copy concise and to the point. Use short, crisp sentences and bullet points.

If you are using an abbreviation, spell out the words in full followed by the abbreviation in brackets the first time it's used.

If you are not using a template, break the text into numbered paragraphs and sections so your business case can be easily read. Include a contents page.

Relegate detail to appendices.

5.

Start with the executive summary

This is where you briefly outline what the business case is about. Summarise details of the evaluation and outcome measures for the project. You should devise an exit strategy if your bid is for short-term funding.

Acknowledge those who helped to develop your business case.

6.

Explain the background and current position

Describe your newly identified need or gap in current or future service provision.

Describe details of current service provision, whole-time staffing equivalents and cost of the current service.

Provide any other data that are relevant to your bid; e.g. waiting times, numbers of patients and any new developments that will impact on the service.

7.

Put it in a national context

Link your bid to priorities identified nationally: for example, national service frameworks, National Institute for Health and Care Excellence or the Scottish Intercollegiate Guidelines Network. This evidence will usually be linked to locally driven priorities and will have influence.

8.

Put it in a local context

Try and link national priorities to your local situation. You should liaise with, and take into account, cardiac networks and other local networks and planning teams. Find out about local authority planning.

9.

Explain previous service redesign

Summarise any redesign work you undertook to improve the service before your business case was written. This will demonstrate that you have explored every way to improve your service within your current resources. Highlight any workforce needs and staffing levels.

10.

Appraise the options

Tell the audience the different ways to address the issue. Be realistic about what is achievable in the proposed timeframe and budget.

For each option, include a detailed description of what it is, what it will involve and how it will impact on the current situation. Include:

- internal and external factors
- a breakdown of pros and cons
- the risks and how they will be managed
- costings
- funding requirements
- a timescale.

Explain the reasoning behind your overall recommendation for your preferred option. Highlight the consequences of doing nothing at all.

11.

Explain how it will affect patients directly

Spell out how many people will benefit from the service.

Get historical data showing past admissions/readmissions/uptake of the service, and what happened to this group of service users before your service was or will be implemented.

Prove that the data are consistent with the required service development so that they support your case.

Link data with any service redesign work. Include outside demand that is impacting on the service. Include projected referrals to the service.

12.

Work out the finances

- Get help and advice when putting this section together.
- Be aware that most financial information falls into two categories: revenue and capital costs. Each has its own consequences.
- Remember to highlight cost savings or how investing now can lead to future savings.

13.

Look at the impact on other services

- Consider how your business case could affect other services in the same area.

14.

Estimate timescales

- Set realistic timescales for implementation, remembering that they may also be affected by the financial year.

15.

Do final checks

- Verify final figures with finance.
- Check spelling and have the document proofread.
- Obtain sign-offs.

Making your business case effective

An effective business case must demonstrate that your service or project:

- clearly benefits patients and service users
- is economically sound
- is financially viable
- is well managed
- is supported by purchasers
- benefits your organisation
- illustrates the consequences if your proposal doesn't go ahead.

Be clear about the goals of your service or project. For instance, it may be:

- a campaign to increase public awareness of heart attack symptoms in order to improve out-of-hospital cardiac arrest outcomes;
- a healthy cookery course or fitness project to help reduce childhood obesity;
- the provision of a particular treatment for patients in their own homes to improve quality of care and reduce hospital costs.

The more specific you can be, the better.

Summary of steps to take

Tick

Identify need for business case.	<input type="checkbox"/>
Understand national and local priorities to include in business case.	<input type="checkbox"/>
Identify key stakeholders, gain support and ensure your organisation is aware of the proposal.	<input type="checkbox"/>
Form steering group or task group if appropriate.	<input type="checkbox"/>
Obtain national information to support case.	<input type="checkbox"/>
Obtain local information to support case.	<input type="checkbox"/>
Request relevant data to support case.	<input type="checkbox"/>
Request costings and quotes, which must include 'on' costs.	<input type="checkbox"/>
Gather redesign evidence.	<input type="checkbox"/>
Agree format and presentation of material.	<input type="checkbox"/>
Check spelling.	<input type="checkbox"/>
Proofread.	<input type="checkbox"/>
Obtain final 'sign-offs'.	<input type="checkbox"/>
Submit business case appropriately.	<input type="checkbox"/>
Let us know about your success – visit our feedback page.	<input type="checkbox"/>
Share your knowledge with other Healthcare Professionals.	<input type="checkbox"/>
Implement and celebrate!	<input type="checkbox"/>
Identify key stakeholders, gain support and ensure your organisation is aware of the proposal.	<input type="checkbox"/>
Form steering group or task group if appropriate.	<input type="checkbox"/>

'On' costs are costs that an employer has when employing someone, in addition to paying their salary, e.g. pension contributions and National Insurance payments.

Remember to include incremental cost of living increases for subsequent years' budgets. Your HR and payroll departments can assist in providing this information.



**British Heart
Foundation**

Coronary heart disease is the UK's single biggest killer.

For over 50 years we've pioneered research that's transformed the lives of people living with heart and circulatory conditions. Our work has been central to the discoveries of vital treatments that are changing the fight against heart disease.

But so many people still need our help.

From babies born with life-threatening heart problems to the many Mums, Dads and Grandparents who survive a heart attack and endure the daily battles of heart failure.

Join our fight for every heartbeat in the UK. Every pound raised, minute of your time and donation to our shops will help make a difference to people's lives.

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