

3D Business Case Template

I. Executive Summary

This is this introduction and overview for your investment request. This should be a clear and concise summary of the problem(s) to solve and your proposed solution. We recommend including a summary of the financial metrics and supporting visuals / diagrams that tie to the details found within the subsequent sections of the business case.

II. Opportunity: Problem(s) to Solve and Proposed Solution





- The Market Problem
 - As a thought starter, here are sample market opportunities and pain points / problems that your organization may be trying to solve:
 - The continuing trend of consumers shifting into digital shopping methods within your category, presenting an opportunity for organic growth, or a risk of lost revenue if you choose not to invest in this new channel.
 - An opportunity to increase conversion rate and/or Average Order Value (AOV), as consumers purchase a full room vs. a single item
 - Losing market share to other retailers and/or brands that offer their customers digital experiences that reduce friction in the buying journey.
 - An increase in product returns over the last X months compared to the prior year due to an increase in order errors, resulting in a loss of \$Y.
 - A reduction in your store footprint, or new locations opening with smaller square footage that limit your ability to showcase your product catalog.
 - The opportunity to leverage new digital technologies as a means to eliminate the cost of traditional photography used for merchandising and marketing purposes.

- Proposed Solution
 - Describe the proposed solution and the benefits to be gained by the organization. How does this proposed solution align to your company's overall strategy?
 - How will the proposed solution change how you engage with customers and/or improve the overall customer experience?
 - How will this help the organization gain efficiencies and/or improve cost effectiveness in the short and long-term?
 - Does the solution have the ability to scale and create value for other parts of your business?

III. Market Analysis

- Validation of the Market Problem and our Solution
 - External research firms and consultancies publish insights on technology, consumer and industry-specific trends with supporting data and visuals that you can leverage, but do make sure they fit within the context of your business and the problems you are trying to solve.
- Competitive Analysis
 - This section should include a comparison of the capabilities of competitors and how they are approaching the same challenges and/or opportunities
 - Create a Harvey ball chart to visually compare and contrast strengths and weaknesses within the competitive set

	Competitor 1	Competitor 2	Competitor 3	Competitor 4
Capability 1	●	◐	◑	◒
Capability 2	◐	◐	●	◐
Capability 3	◒	◒	◒	◑

Capability 4				
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- Your Unique Competitive Advantage
 - What is your ‘secret sauce’? What strengths and capabilities do you currently have that give you the right to win in the market?
- Challenges we must address
 - This can include current business risks, capability gaps, and/or known issues that could hinder the success of the business if left unresolved.

IV. Execution / Project Plan

- 3D Project Goals and Measures of Success (Key Metrics)
- Key Milestones and Deliverables
- Sales & Marketing Plan
- Current and Proposed Organization / Resources (Internal and external)

V. Financial Plan

- Revenue
- Required Investments
 - Organization (internal resources and/or additional proposed headcount)
 - Operating Expenses (e.g., 3rd party vendors)
 - Projected Capital Expenses