SAUDER SCHOOL OF BUSINESS

Executive
Education

PROFESSIONAL
DEVELOPMENT
PROGRAMS

Building a Successful Business Case

The Art of Getting What You Need

Funding. Staffing or equipment. Promotion. Customer satisfaction. No matter what you're asking for, a strong business case can open the door to getting what you need.

This program is designed to help you achieve success by building a compelling business case. Learn what decision makers require in order to act on your ask. Use the case creation process to organize your thoughts and plot your course of action. Draft a concise report that covers the necessary bases. Deliver a persuasive presentation that will capture your audience's attention and convince them to grant your request.

Takeaways

- Support your initiatives with straightforward financial analysis
- Make better decisions through defined goals and action plans
- Understand your audiences and cater to their needs
- Employ the terminology used by key decision makers
- Strengthen your presentation skills with effective preparation and execution techniques
- Deploy strong business cases to advance both immediate-term requests and long-term career goals

Program Content

Laying the Groundwork
- What is the "Ask" and why does it matter?
- Identifying decision makers at all levels: from customers or the public, to reporting staff, to department heads, to top-level executives
- What are decision makers looking for, and what do they need to advance your case?

Developing the Rationale: Tools and Techniques
- Identifying Key Success Factors for the department
- Strengthening the case with financial analysis tools (Variable vs. Fixed Costs; Profit vs. Cash Flow; Contribution Margin; Analysis of Cost Drivers; Net Present Value)
- Key Performance Indicators (KPIs)
- KPI Tracking for Return on Investment (ROI) Validation
- Internal control including IT controls

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Program Content (cont'd)

Drafting and Refining the Case Report
- Gathering and organizing relevant supporting materials
- Analyzing your audience and addressing their needs
- Defining goals and expected outcomes by employing your KPIs
- Putting together specific action plans, and tracking success against KPIs
- Creating an Executive Summary: boiling the case down to its essentials

Business Case Presentation
- Employing the language of decision makers
- Presentation methods and weaving a convincing story
- Persuading decision makers to support you

Special Features

This program uses concise real-world examples to illustrate key topics, culminating in one large scenario where you will build a business case to reflect your suggested path forward. You will also be provided with a business case template for program and career use.

Program Leaders

Bo Zhang (CPA, CA) worked in Ernst & Young LLP's assurance practice in Canada and the U.S. where he had extensive experience in SEC financial reporting, internal controls and compliance. Currently he is an accounting instructor at Kwantlen Polytechnic University, and an independent consultant for real estate transactions including valuation and cash flow forecasting.

Scott MacEachern (CPA, CA) has had wide-ranging career experiences as the CFO of a public multinational fibre optic deployment company; University adjunct professor; and auditor for a Big 4 accounting firm. He is currently a partner of LedgerLiberty, an accounting firm specializing in mid-size public company compliance and professional development program offerings.

To Register

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