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IT investment case health check



Use this checklist to see whether your proposal is ready for executive review.

1 Problem definition

Start with the business problem, not the technology.

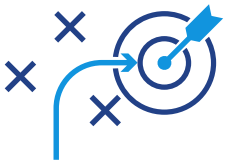
- [ ] We can describe the problem in plain business language.
- [ ] We have evidence the problem is material and worth solving.
- [ ] We know who is affected and how.
- [ ] We are leading with the problem, not the platform.



2 Strategic relevance

Show why this matters to the organisation now.

- [ ] We can link the proposal to clear business priorities.
- [ ] We can explain why action is needed now.
- [ ] We have identified the executive-level outcomes.
- [ ] We can explain the impact of delay.



3 Value and benefits

Define the value in outcome terms, not just savings.

- [ ] We have defined measurable business outcomes.
- [ ] We have gone beyond cost savings alone.
- [ ] We have estimated productivity, capacity, service, or risk gains.
- [ ] We have shown both financial and non-financial value.



4 Cost of inaction

Make the hidden cost of doing nothing visible.

- [ ] We have quantified the hidden cost of doing nothing.
- [ ] We have highlighted technical debt, delays, and rework.
- [ ] We have identified operational, compliance, or resilience risks.
- [ ] We have made the urgency of change clear.





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5 Proposed capability

Explain what is being funded in business terms.



- [ ] We can describe the capability being funded in business language.
- [ ] We have shown how the solution supports the desired outcomes.
- [ ] We have defined scope, assumptions, and dependencies.
- [ ] We have included a realistic delivery approach.

6 Organisational readiness

Show that the organisation can turn the investment into value.



- [ ] We have assessed process maturity and data quality.
- [ ] We have identified governance, security, and change requirements.
- [ ] We have a plan for adoption, training, and communication.
- [ ] We are confident the organisation is ready to deliver value.

7 Measures and accountability

Make success measurable and owned.



- [ ] We have defined clear success metrics and baselines.
- [ ] We know how benefits will be tracked and reported.
- [ ] We have named owners for delivery and outcomes.
- [ ] We have defined review points after approval.

8 Executive readiness

Make the proposal easy to support and approve.



- [ ] We have built support beyond IT.
- [ ] Finance, operations, and other stakeholders have shaped the case.
- [ ] The decision required is clear.
- [ ] The proposal is concise, credible, and board-ready.

How did you score?

- **28-32 checks:** Board-ready
- **20-27 checks:** Strong foundation - refine the gaps
- **Below 20 checks:** Rework before submission



Quick tip

Unchecked boxes show where your proposal needs more evidence, clarity, or stakeholder support.



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