



Service definition Business Case

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INTRODUCTION

Over the last 15 years we've built up deep expertise in a set of key services where we add the most value to our non-profit clients. We regularly review and evolve these, based on our continuing experiences, regular engagement with the sector, and our knowledge of the changing landscape in which we operate. Our focus is to Helping amazing organisations achieve remarkable things to enable the building of digital and change capability within the non-profit sector.

SERVICE

The client requires a clear strategy and roadmap to understand their options for upgrading or replacing their existing technology. Hart Square does not presume all stakeholders are aligned on the options, costs and goals for technology and the approach must seek to provide clarity and ensure buy-in from all relevant groups, at both a senior level and operational team members.

- Hart Square has delivered 250+ business case projects with non-profit sector organisations over the past 15 years
- Hart Square is independent of any technology and has an in-depth knowledge of the offerings available in the market for the non-profit sector
- We invest a considerable amount of time and effort keeping abreast of the everchanging technology marketplace, taking into account the real world cost of technology change projects. This is based on statistical analysis of over 12yrs of project data and our experience in working with a broad range of Technology partners
- We maintain relationships with key sector specific Technology Partners to ensure we understand their offerings, focus areas, developments and their own evolution
- We present the findings of a business case iteratively to ensure buy-in from the project board and other key stakeholders, and to align key decisions with the strategic goals of the organisation so that they can be implemented at low risk
- We manage and deliver around 20 CRM and digital procurement projects per year for similar charity and membership bodies
- This in-depth market and supplier knowledge will allow us to advise on project budgets with a high degree of confidence

DELIVERABLES

Hart Square will deliver the following:

- **Optimum investment strategy:**
 - Invest-in or replace the current system to meet the clients strategic goals, review of the current system
 - We provide costs and implications for each
- **Optimum arrangement of projects:**
 - Provide clarity on what order the interlinked projects should be delivered in to minimise risk or duplicated spending
- **Budget confidence:**
 - Production of high-level budgets for the delivery of the roadmap. This includes an estimate of costs for resourcing, tendering and recurring costs.
- **Project and Technology options:**
 - We provide a profile of options, costs, approaches, and implications for:
 - Enhancing the current technology
 - Replacing of technology
 - Required integrations
- **Project resourcing:**
 - We advise on the resources, skills, capacity, and budgets required to deliver:
 - **Timescales**
 - Provide clarity over timescale for upgrade or replacement of current systems
 - **Risk Analysis:**
 - Clarification of benefits and short, mid, and long-term risks and potential steps to mitigate them
 - **Future projects:**
 - Recommendations for any subsequent projects (if relevant)
- **Presentation to the management team**
 - Provide clarity on the strategic options available with costs, risks and timelines