Vero Technologies

MODERNIZATION PLANNING · WORKSHEET

Build the case

Five exercises that turn an operational complaint into a number a committee can defend. Work through them in order. Read the guide first if you have not.

EXERCISES	TIME	COMPANION
Five	Half a day	The Business Case guide

Exercise 1 · Problem assessment

List every issue, inefficiency and recurring fire affecting the operation today. Do not filter while listing. Filtering is exercise 2.

THE PROBLEM	WHO IT TOUCHES	WHAT IT CONSUMES	HOW OFTEN	ROUGH SCALE

DO THIS WITH THE PEOPLE WHO DO THE WORK

A list assembled by managers describes the problems managers can see. The steps consuming the most time are usually invisible one level up, because the person absorbing them stopped mentioning it years ago.

Exercise 2 · Impact against effort

Place each problem from exercise 1. Impact is what it costs you to leave it alone. Effort is what resolving it takes, including change management.

QUICK WINS · HIGH IMPACT, LOW EFFORT	STRATEGIC BETS · HIGH IMPACT, HIGH EFFORT

HOUSEKEEPING · LOW IMPACT, LOW EFFORT	DECLINE · LOW IMPACT, HIGH EFFORT

Which single problem are you building the case for?

Pick one. A case covering three problems gets funded for none of them.

Why this one, and why now?

Exercise 3 · The five numbers

Four are arithmetic. The fifth is an estimate and is kept separate on purpose.

1 · Hours

Your three highest-volume manual steps, timed for one week with the people who do them. Annual volume × time per unit, at fully loaded cost.

2 · Headcount avoided

People the current model requires in 24 months at your growth plan, minus today. The gap is the number.

3 · Leakage

Interest and fees not billed, curtailments applied late, discrepancies found at audit rather than at funding. Sample a month, extrapolate.

4 · Maintenance already being paid

Internal engineering hours, vendor support fees, and the deferred enhancement backlog.

Floor total (1 + 2 + 3 + 4)

5 · Revenue at risk ESTIMATE

KEEP THESE APART

The floor total is defensible arithmetic. Revenue at risk is an estimate. Folding the second into the first means losing the whole total the moment the estimate is questioned.

Exercise 4 · Three options

Fill in all three honestly. A status quo column with no advantages tells the committee you are selling rather than analysing.

OPTION A

Status quo

What you would do

Advantages

Costs and risks

OPTION B

Incremental fix

What you would do

Advantages

Costs and risks

OPTION C

Comprehensive change

What you would do

Advantages

Costs and risks

Exercise 4 · Score each option

One to five on each dimension. The totals rarely decide it on their own, but a wide gap on scalability usually should.

DIMENSION	A · STATUS QUO	B · INCREMENTAL	C · COMPREHENSIVE
Cost against benefit, and time to see it			
Implementation feasibility			
Scalability to 2030 volume			
Risk of acting, and of not acting			
Internal alignment and sponsorship			

Exercise 5 · The recommendation

One page. If it does not fit on one page, the analysis is not finished.

We recommend, and the number is

Lead with both. Background comes later or not at all.

Why the other two options lose

The three assumptions that would most change the answer if wrong

Naming these yourself pre-empts the question.

First phase, owner and date

How success is measured, and when

Send it to us before you send it to committee

We will tell you which numbers will get challenged, where we think you are being too conservative, and what a committee at a comparable lender pushed back on. You keep the model either way.

Send us your model

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