



A POWER OF HR TOOL

The HR Business Case Builder

A fill-in template for building the kind of business case that earns a yes — take it straight into your next budget conversation.

A companion resource to
The Power of HR
by Joey V. Price

KEEP GOING

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A companion tool to The Power of HR: How to Make an Organizational Impact as a People-Professional.

How to use this

This is the tool for the moment when you know something needs to change and you need other people to fund it. Work through it in order. The first three sections are preparation, the middle sections are the case itself, and the last section is what you do in the room.

You do not need to fill every line. You do need to be able to answer any of them if asked.

One principle before you start: take a position. A recommendation people can act on is a clear one. If you genuinely see two viable paths, name your preference and say why.

Part 1: Preparation

1.1 What is the situation?

Describe what is happening, in the terms the business uses. No HR jargon.

1.2 Which business objective does this connect to?

Name the specific organizational goal, initiative, or number this supports.

1.3 Who is affected?

Group	How they are affected	What they will want to know

1.4 Data collection

Internal sources. Surveys, performance metrics, financials, turnover data, exit interviews, system reports.

Source	What it tells me	Have it?

External sources. Industry benchmarks, published best practice, peer organizations, vendor data.

Source	What it tells me	Have it?

What is the single most compelling number you have?

1.5 Stakeholder engagement

Before you write the proposal, talk to people. Interviews, focus groups, or a working session.

Who	Method	Date	What I learned

What did these conversations change about your thinking?

Part 2: The case

2.1 Clear objectives

Write your objective in SMART terms: specific, measurable, achievable, relevant, and time-bound.

Objective:

What does success look like at 90 days?

At 12 months?

Your position, in one sentence:

2.2 Cost-benefit analysis

Costs

Type	Description	Estimated amount	Confidence
Direct			
Direct			
Indirect			
Indirect			

Type	Description	Estimated amount	Confidence
Opportunity			
Total			

Direct costs are what you write a check for. Indirect costs are the internal time, system changes, and management attention this consumes. Opportunity costs are what the organization gives up by choosing this over the alternatives.

Benefits

Type	Description	Value	How I would measure it
Quantitative			
Quantitative			
Quantitative			
Qualitative			
Qualitative			
Qualitative			

What is the cost of continuing as we are?

Where does this net out, and over what time horizon?

2.3 Risk evaluation

Look at both categories. The second is the one HR is uniquely positioned to see.

Legal and financial

Risk	Likelihood	Impact	How we manage it

People and experience — morale, team dynamics, employee experience, candidate experience

Risk	Likelihood	Impact	How we manage it

What is the biggest risk of not doing this?

2.4 Strategic alignment

Organizational fit. How does this fit the strategy, the structure, and the way this organization actually operates?

Persuasive argument. What is the single strongest reason to say yes, stated in one paragraph?

Collaborative appeal. Who else is invested in this succeeding, and how do you invite them in rather than present them with a finished decision?

Part 3: Developing the proposal

Use these headings in your written document. One page each is usually plenty.

Executive summary

The ask, the reason, and the expected return, in under 200 words.

Problem statement

Proposed solution

Cost-benefit summary

Risk assessment summary

Implementation plan

Phase	What happens	Owner	Timing	Milestone
1				
2				
3				
4				

Visuals

Which two or three visuals carry the argument on their own? A trend line, a before-and-after, a cost comparison, a benchmark chart.

☐ Visual 1: _____

☐ Visual 2: _____

☐ Visual 3: _____

Part 4: Presenting it

The five persuasion questions

Answer all five before you walk in.

1. Who is my audience?

2. What do they care about?

3. What objections might they have?

4. What longstanding beliefs do I need to acknowledge?

5. Why am I confident in my position?

Your story

Every good business case has a narrative underneath the numbers. What is yours? A specific person, a specific moment, a specific consequence.

Anticipated questions

Likely question	My answer	Backup evidence

Before you present

- ☐ I have stated a clear position, not a menu of options
- ☐ My objective is specific, measurable, and time-bound
- ☐ I have accounted for direct, indirect, and opportunity costs
- ☐ I have named both quantitative and qualitative benefits
- ☐ I have quantified the cost of doing nothing
- ☐ I have assessed legal, financial, and people risks
- ☐ I have talked to the stakeholders this affects, before the meeting
- ☐ I have connected this to a business objective my audience already owns

- ☐ I know who else in the room supports this
 - ☐ I have a story, not just a spreadsheet
 - ☐ My visuals would make the case if I lost my voice
 - ☐ I have prepared answers to the three hardest questions
 - ☐ I know exactly what I am asking for and by when
 - ☐ I know what a scaled-down pilot version would look like if the full ask is not available today
 - ☐ I know how I will report back on results, and when
-

If the answer is not yet

That is information, not a verdict. Note what you heard.

What was the actual hesitation?

What would need to be true for this to be a yes?

What is the smallest version of this you could pilot to generate the evidence?

When will you bring it back?
