



# Tech + People Business Case Worksheet

Inspired by ALA Session: "Tech Investment and People Investment Are Now the Same Thing"

## How To Use This Worksheet:



## 1. WORKFORCE IMPACT *(How Work Changes Today)*

How does this investment affect your people?

Consideration	Positive Effect	Risk	Mitigation
<i>Burnout / Workload</i>	<i>Fewer repetitive tasks</i>	<i>Efficiency creep</i>	<i>Create workload benchmarks</i>
<i>Retention / Engagement</i>	<i>More standardized workflows</i>	<i>Resistance to new processes</i>	<i>Provide quick-reference guides</i>
<i>Role clarity</i>			

**Reflection:** How will these changes affect how people feel about their work day-to-day?

**Key Takeaway:** Quantify how people's work will change (list pros & cons).

## 2. TALENT IMPACT *(Recruitment & Retention)*

How will this investment help attract next-gen talent and reduce attrition?

Talent Driver	Current State	Expected State	Long-Term Benefits
<i>Access to modern tools (AI literacy)</i>	<i>Limited</i>	<i>Proficient</i>	<i>Increased specialization</i>
<i>Ability to work with data</i>	<i>Low</i>	<i>Higher</i>	<i>Opens career pathways</i>
<i>Automated client communication</i>			

**Reflection:** Is this primarily a tech investment, a people investment, or both? Explain your reasoning.

**Key Takeaway:** Connect the investment to what next-gen talent values (modern tools, growth, skill-building, and meaningful work).

## 3. OPERATIONAL IMPACT *(Efficiency, Quality, Risk Reduction)*

How will this tool improve current processes?

Metric	Current	Projected	Notes
<i>Task turnaround time</i>	<i>24 hours</i>	<i>4 hours</i>	<i>AI email routing triages incoming task</i>
<i>Error frequency</i>	<i>Occasional rework</i>	<i>Reduced errors</i>	<i>Standardized intake and routing improves accuracy</i>
<i>Client communication</i>			

**Reflection:** Which pain point, if solved, would create the highest immediate value for your firm?

**Key Takeaway:** Outline all of the inefficiencies and how the investment will address each.

## 4. FINANCIAL IMPACT *(ROI, Cost of Doing Nothing)*

How does this investment create measurable financial value for the firm?

Cost	Benefit	Amount	Notes
<i>Efficiency gains</i>	<i>Increased revenue</i>	<i>1 hour per day saved * \$X blended rate</i>	<i>Based on reduced triage time</i>
<i>Attrition cost avoided</i>	<i>Reduced turnover through improved workload + modern tools</i>	<i>\$X per retained employee</i>	
<i>Training / Support</i>			

**Reflection:** Where will you see measurable value first: time saved, revenue uplift, or reduced attrition?

**Key Takeaway:** Provide realistic estimates of financial impact and how the investment will show a return.



**Quick Tip:** If a business case only works when you ignore the workforce or capability impact, it's not a strong case. Include all four dimensions!



**Common Mistake to Avoid:** Don't build your business case around features. Build it around real workflow pain, talent expectations, and long-term capability growth.

*Workflow solution + talent opportunity + capability improvement = A strong business case.*