

[INSERT DATE]

[INSERT FULL NAME]

[INSERT JOB TITLE]

[INSERT COMPANY NAME]

[INSERT COMPLETE ADDRESS]

**Re: Case Report**

Dear Mr./Ms. [INSERT SURNAME],

I have enclosed together with this letter your request for a case report regarding [INSERT COMPANY NAME]’s planned purchase of a new computer software to be used throughout the entire company. The preliminary date for the project’s execution will be on [INSERT DATE]. The enclosed case report is comprehensive and structured in accordance with the formal project management methodologies. The case report includes information on the expected benefits from the project. I have also included a brief project background, project alternatives, gap analysis, expected costs, and risks.

On behalf of and as one of the stakeholders and sponsors of the project, I hope that you will capture the justification for initiating the software upgrade.

For your concerns, you may call or email me directly at [INSERT CONTACT NO.][INSERT EMAIL ADDRESS].

Respectfully yours,

[INSERT FULL NAME]

[INSERT JOB TITLE]

[INSERT COMPANY NAME]

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1. **EXECUTIVE SUMMARY**

This case report recommends the purchase of a computer software to replace the outdated system used by the company, which is calculated to save the company an estimated amount of [INSERT AMOUNT AND CURRENCY] in labor costs for the next [INSERT NUMBER OF YEARS] of operation. The key benefit from the purchase of this equipment is increased productivity resulting from process improvements and increased output accuracy. The return on investment (ROI) is estimated to be [INSERT RETURN ON INVESTMENT]. The new software will replace the old system, which has been with the company for over [INSERT NUMBER OF YEARS] years.

1. **BENEFITS**

Below is a summary of the benefits that will accrue with the purchase of the new software:

1. Annual lease cost on the company’s current automation equipment will be eliminated;

[INSERT DETAILS]

2. Automatic update and distribution of share files;

[INSERT DETAILS]

3. Errors in overwriting files are eliminated; and

[INSERT DETAILS]

4. Improved financial modelling.

[INSERT DETAILS]

5. [INSERT OTHER BENEFITS]

[INSERT DETAILS]

1. **OPPORTUNITIES**

The software upgrade will eliminate errors and bring about efficiency and increased production. An estimated [INSERT NO OF HOURS] hours of work will be saved per week. This is an opportunity for the company to be more efficient, continue to create a sustainable growth and development, and effectively allocate resources to assets that will effectively contribute to revenue generation.

1. **ALTERNATIVES**

The new software will be purchased from [INSERT COMPANY NAME] and will cost [INSERT AMOUNT AND CURRENCY]. We have looked into different companies that offer the same software in order to get the best deal. The table below shows the difference in prices, maintenance and installation fees, and services.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **[INSERT COMPANY A NAME]** | **[INSERT COMPANY B NAME]** | **[INSERT COMPANY C NAME]** | **Price Difference** | **Advantages / Disadvantages** |
| 1. Purchase Price | USD 0.00 | USD 0.00 | USD 0.00 | USD 0.00 | [SPECIFY ADVANTAGE OR DISADVANTAGE] |
| 2. Installation Fee |  |  |  |  |  |
| 3 Annual Maintenance Contract |  |  |  |  |  |
| 5. [INSERT OTHER LINE ITEM] |  |  |  |  |  |

1. **SENSITIVITY ANALYSIS**

The following table is a summary of the results of the sensitivity analysis conducted on the purchase of the new software.

|  |  |
| --- | --- |
| **Administrative Personnel Labor Reduced** | **Labor Savings** |
| 500 hours per year | USD 0.00 |
| 450 hours per year |  |
| 400 hours per year |  |
| 350 hours per year |  |
| 300 hours per year |  |
| 250 hours per year |  |
| 200 hours per year |  |
| 150 hours per year |  |
| 100 hours per year |  |
| 50 hours per year |  |

1. **FINANCIAL READINESS**

The table below is the statement of the company’s cash flow for the next three years and its readiness to purchase the new software.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Year 0** | **Year 1** | **Year 2** | **Year 3** |
| **COST:** |  |  |  |  |
| Purchase Price | USD 0.00 | USD 0.00 | USD 0.00 | USD 0.00 |
| Installation Fee | USD 0.00 | USD 0.00 | USD 0.00 | USD 0.00 |
| Annual Maintenance Contract Fee |  |  |  |  |
| **SAVINGS:** |  |  |  |  |
| Leased Automation Equipment | USD 0.00 | USD 0.00 | USD 0.00 | USD 0.00 |
| Labor |  |  |  |  |
| Subtotal |  |  |  |  |
| **Cash Flow** | **USD 0.00** | **USD 0.00** | **USD 0.00** | **USD 0.00** |

1. **TASKS AND INSTALLATION**

The installation of the new software will be scheduled upon approval by the Board of Directors of this case report. The report will be submitted for decision by the board within [INSERT NUMBER OF DAYS] days from the date of receipt. Assuming that there is no delay, installation will be scheduled between [INSERT DATE] and [INSERT DATE].

The following tasks will be performed in connection with the installation of the new software.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Task To Be Performed** | **Task Details** | **Responsible Person** | **Start Date** | **End Date** |
| 1. Software installation and testing | [INSERT TASK DETAILS] | Software Engineers | [INSERT DATE] | [INSERT DATE] |
| 2. IT and administrative staff training | [INSERT TASK DETAILS] | Software Engineers |  |  |
| 3. Monitoring of administrative personnel time reports | [INSERT TASK DETAILS] | Manager |  |  |
| 4. [INSERT OTHER TASK] |  |  |  |  |

1. **IMPLEMENTATION PLAN**

The following schedules shall be observed in relation to the installation of the new software and training of the company’s IT and administrative staff.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Start Date** | **End Date** | **Start time** | **End Time** |
| 1. Installation | [INSERT DATE] | [INSERT DATE] | 0:00 AM/PM | 0:00 AM/PM |
| 2. Training of IT Staff |  |  |  |  |
| 3. Training of Administrative Personnel |  |  |  |  |

1. **RECOMMENDATIONS**

In order to realize the savings and other financial estimates in relation to the software upgrade, this case report recommends the following:

1. Purchase of the new software from [INSERT COMPANY NAME] at a purchase price of [INSERT PURCHASE PRICE]

2. Have the new software installed and tested no later than [INSERT DATE]

3. Have the IT and administrative personnel trained no later than [INSERT DATE]