

# The Guide to the Project Business Case Review Map & Checklists

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The Business Documents like the Business Case contains a lot of information needed for the Project Charter and is, therefore, one of the Inputs to the “Develop a Project Charter Process. You may use our corresponding Mind Map and Checklists to support you in that process but read this Guide **before** you start!



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# Letter from Markus

**T**he **Project Business Case Review Map and Checklist**, which is the subject of this guide, deals with reviewing the project business case, which usually precedes a project initiation and is practically part of the basis of a project and ultimately - by presenting a positive business case - justifies its implementation.

In this short tutorial, we will suggest how to analyze an already existing business case - or other business documents like contract documents, scope definitions, or similar. - the best way to proceed. As I said, this is only a suggestion and should not be seen as a dogmatic requirement. You are free to decide how to use the templates and tools we give you with our MP4PM Business Case Toolkit. If you are still at the beginning of your project management career and maybe have this as a task before you for the first time, it is certainly not a bad idea to follow our suggestion first. With the Business Case Review Mind Map and the Checklist, we give you, this should not be too difficult, so let us get started right away ...

***Good luck with the analysis of your project business cases, and see you soon,***

***Markus***

# Step 1 – open the BC Mindmap

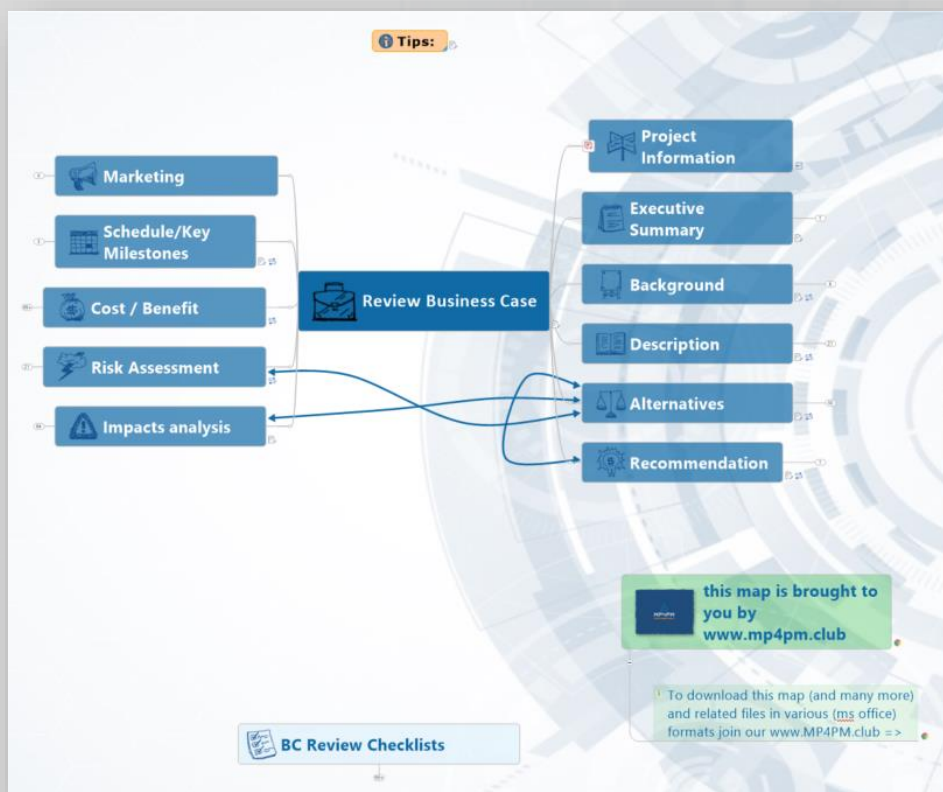
First, you should open the mind map included in the business case and familiarize yourself with the mind map structure and the individual sections.

The mind map is included in 2 versions:

- 1. as **HTML5 file** - this format can be opened and navigated with any current web browser. Disadvantage: this format is not editable.
- 2. as **MindManager Map** (.mmap); this is the format of the application ( Mind Manager) with which the map was created. You can either download the mind manager (also available in a free trial version) or import the map with the mind-mapping tool of your choice if your tool supports the import of the .mmap format.

**Note:** We plan to make the maps available on the Miro Platform soon and make this accessible to all MP4PM members. That is a work in progress ...

Here is a **top-level** view of the map:



In the next step, we will get into the details ...



## Step 2 – work through the branches

In this step, you will work your way through the individual branches, starting at the top right with the general project information and then moving clockwise.

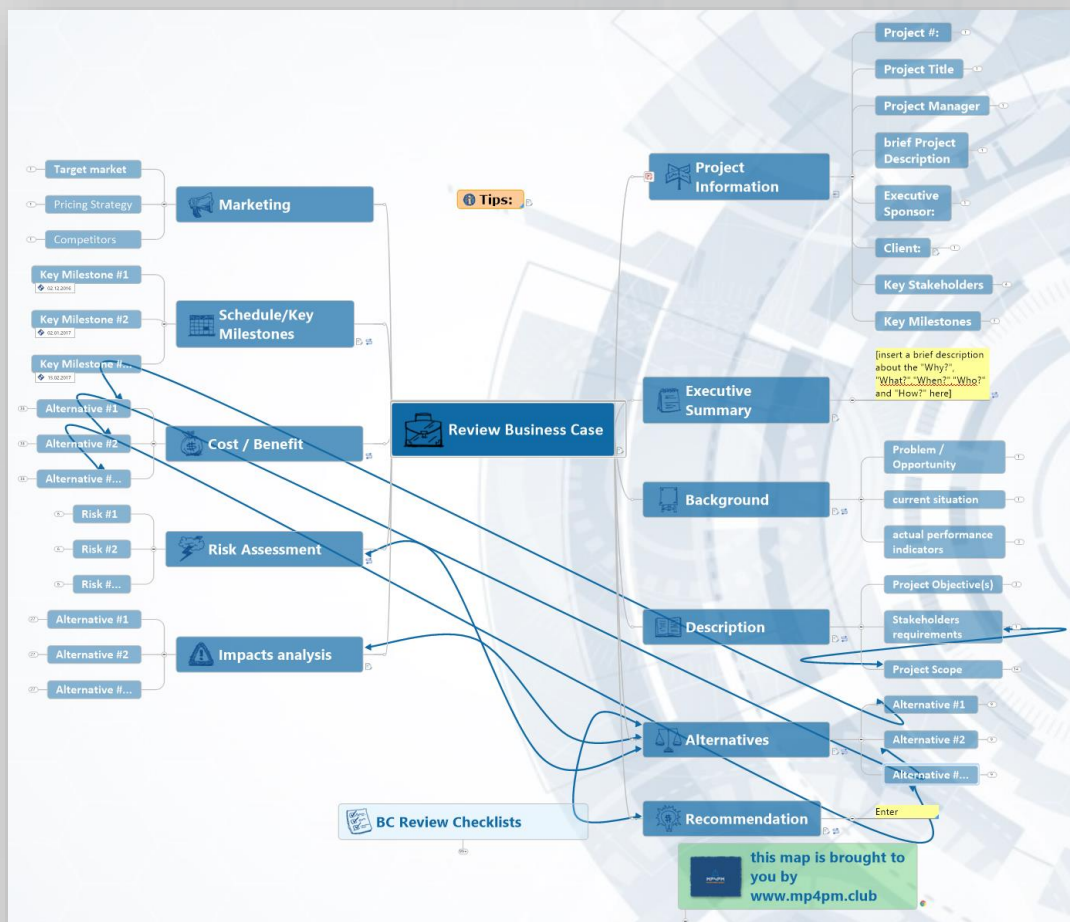
Before this step, you should have looked through the documents available to you. You record the information per branch that you still remember in a first pass.

This way, it quickly becomes apparent where there are still gaps, but you will take care of these in the next step.

By now you should have a good feeling for where you can find which information in the business documents. Maybe you have even marked the corresponding sections? When you go through the individual branches again, the actual analysis of the documents begins.

For example, on the topic of *"project description,"*: Here you now work through all the information provided by the business documents and record the project description as carefully and accurately as possible.

This information will be precious when creating the project charter in the following project process!



## Step 3 – utilizing the Checklist

We have developed a checklist or questionnaire to support you in analyzing the business case or other business documents.

The questions should help you explore the business documents in a targeted and effective way and extract the relevant information. Of course, you can extend the checklist at any time with your questions or points - which are applicable in your business environment, for example - or adapt the existing formulations to your needs.

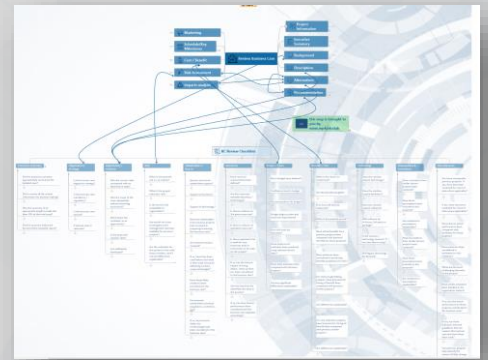
We would be thrilled to receive your feedback on this, or even better, you provide us with your version of the checklist in the MP4PM.club community! Might we even include your performance in our toolkit? We will surely come up with a reward for you!

However, back to the checklist: This is available in 2 versions. On the one hand, it is directly incorporated into the mind map as a separate branch.

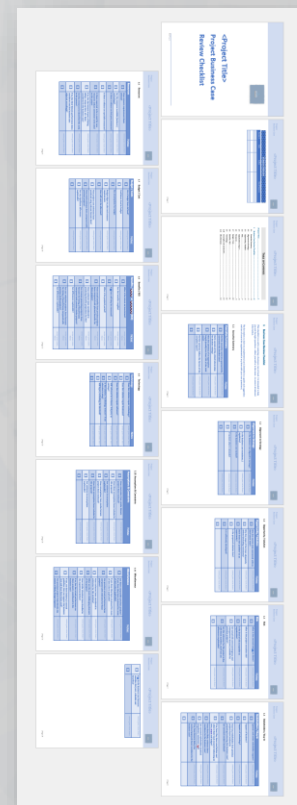
So, you can easily share it - using the HTML5 version of the map - in a browser. In this way, it is wonderfully helpful to work out the contents together in a team session, for example.

Furthermore, we have delivered the checklist as a separate Word document because not everyone can or wants to work with mind maps. Some people prefer to use a different, editable document.

What you want to work with is up to you; the content of both versions is identical!



You can use the Checklist included in the Mindmap to support your analysis!



This is the complete Checklist as a Word File Overview

## Step 4 – Stakeholder buy in

After you have analyzed the business documents with the help of the mind map and the checklist, you should **discuss and agree on your results with the key stakeholders** such as the sponsor, the client, the head of the affected department, etc.

On the one hand, this step clarifies any ambiguities **and ensures a common understanding** of the contents of the business documents and, ultimately, of the project.

Positive side effects are developing relationships with key stakeholders, their involvement in the project from the start, and **the visibility of your professional approach!**

This step will save you a lot of time and effort and provide you with valuable insights into stakeholder engagement.

You should not skip this step!

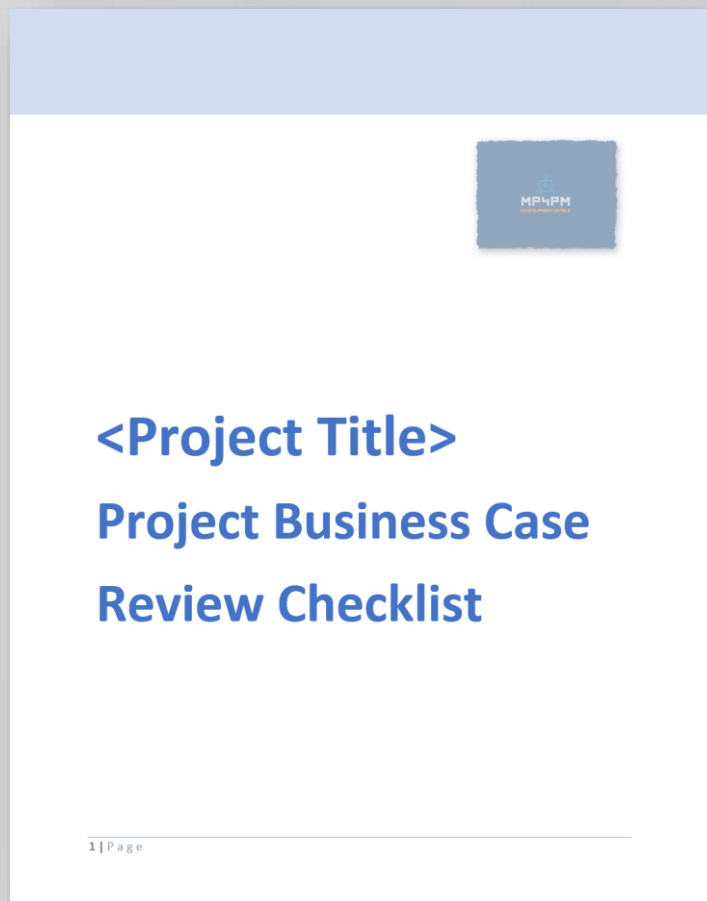


# What you will have when you are finished:

After analyzing the business documents and capturing all project-relevant information, you will have a professional and complete summary and documentation. This result, in turn, forms a professional basis for the work on subsequent project processes such as the creation of the project charter or the definition and analysis of stakeholders.

## How to use the Project Business Case Checklist:

Use the checklist and documented information in communications with stakeholders and the project team. This document provides precious input for the subsequent project processes, and you will undoubtedly refer to this essential document again and again during the project.





# Next Steps

Thank you for using the **Project Business Case Review Guide**. We hope it helped you and made life a little easier for you as a project manager. As already mentioned in the introduction of this guide, the **BC Development Template is additive** included in this **"MP4PM Business Case Tool Kit"** because the actual intention of this tool kit is to **review the** (often already existing) **business case to extract the relevant information for the creation of the project charter**.

So, it is also clear what the next step should be for you, right? And of course, MP4PM also offers a **corresponding tool kit to support you in creating the project charter**. If you like our tool kits and/or MP4PM.club as a community, please let us know and, of course, all your friends and colleagues as well.

Furthermore, if you have any criticism and/or feedback for us, we would also be pleased because it is essential to continue developing our tool kits and MP4PM content in your interest.

Thank you very much in advance and see you soon,

Markus  
Founder mp4pm.club

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nata noectisque nem essi!*



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