



DOWNLOADABLE TEMPLATE

STRATEGY & PLANNING

AI Business Case Template

Build a structured case for AI investment covering the business problem, expected value, costs, risks, ownership, dependencies and measures of success.

AI Business Case Template

This template helps you build a business case for AI investment that will stand up to scrutiny from finance, risk and governance stakeholders alike – connecting the value being claimed to the costs, risks and accountability needed to deliver it responsibly.

1 Executive Summary

Write this section last, even though it appears first. A good executive summary lets a busy sponsor understand the ask, the value and the risk in under a minute.

EXECUTIVE SUMMARY

2 Business Problem or Opportunity

Describe the problem in business terms before describing the AI solution. If the problem cannot be stated clearly without reference to the technology, that is worth pausing on.

BUSINESS PROBLEM / OPPORTUNITY

3 Proposed Solution Overview

A concise description of what is being proposed, including how AI is used, what data it relies on, and how it fits with existing systems and ways of working.

SOLUTION OVERVIEW

4 Expected Value & Benefits

Separate financial benefits from operational, strategic and risk-related ones. Be conservative – credibility matters more than an impressive headline number that cannot be substantiated later.

BENEFIT	TYPE	MEASURE	BASELINE	TARGET	REALISATION TIMEFRAME
	Financial / Operational / Strategic / Risk				

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5 Cost Summary

Include the full cost of ownership, not just build cost — licensing, integration, data preparation, change management and ongoing operational cost are all frequently underestimated.

COST CATEGORY	ONE-OFF COST	RECURRING ANNUAL COST
Build / development		
Licensing / vendor fees		
Integration & data preparation		
Change management & training		
Ongoing operation, monitoring & assurance		

6 Investment Appraisal Summary

Provide a simple, defensible view of financial return. This is a summary for decision-making, not a substitute for your organisation's standard financial appraisal process where one is required.

ESTIMATED PAYBACK PERIOD

ESTIMATED 3-YEAR NET VALUE

KEY ASSUMPTIONS UNDERPINNING THE APPRAISAL

7 Risks & Mitigations

Set out the material risks to delivering the value described above, and how each will be managed.

RISK	LIKELIHOOD	IMPACT	MITIGATION

8 Governance & Ownership

Name the individuals accountable for this initiative, and confirm the governance route it will follow.

ROLE	NAME
Executive Sponsor	
Senior Responsible Owner	
Delivery Owner	
Governance Route (e.g. AI Governance Committee approval required)	

9 Dependencies

List anything this business case depends on to succeed – other projects, data availability, third-party contracts, or organisational capacity.

DEPENDENCIES

10 Approval & Sign-off

GUIDANCE

Route this business case through your organisation’s standard investment approval process, and through your AI Governance Committee where the use case meets the escalation thresholds set out in your AI Governance Framework.

ROLE	NAME	DATE	SIGNATURE
Executive Sponsor			
Finance Approval			
AI Governance Committee (if required)			



Need help putting this into practice?

INTAI works with organisations to design, implement and assure practical AI governance — from first strategy through to ongoing risk management and regulatory readiness. If you would like support applying this template to your organisation, our team is glad to help.

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