

MAKING THE CASE

How to Build a Compelling Business
Case to Kick Start HR-Led Change



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01

INTRODUCTION

In today's data-driven and cost-conscious environment, HR is shifting from being a "soft" function, to one that is recognised for its strategic importance. So any major initiative - whether it's a DEI rollout, HR technology adoption or a leadership development programme revamp - needs strong justification.

A compelling business case is the golden key to unlocking executive support and funding. Whether you're rolling out a new HR target operating model, upgrading your HRIS or overhauling onboarding, a solid business case is how you gain the support - and budget - needed to shift HR from a cost driver to a value driver.



Why You Need a Business Case to Back Your Change Initiative

As HR practitioners we know you're always brimming with ideas and eager to implement change in your organisation, but resistance from stakeholders, finance, or leadership teams can be frustrating. If you can't demonstrate why it matters, what it will achieve and how it aligns with business priorities, the change you want to deliver is unlikely to gain traction. That's the hard reality.

A strong and well-structured business case is your opportunity to translate vision for change into value. It helps to build resilience and credibility, clarifies impact, mitigates risk, and helps people get it—not just emotionally, but strategically and financially.

Whether you're an HR leader transforming organisational culture, a business owner shaking up your operations, or a project lead trying to influence upwards, this guide will help you build a case that turns ideas into action:

- **Why** a business case is your greatest asset when driving change
- **What** makes a business case compelling to stakeholders
- **How** to structure one that gets buy-in, funding, and builds momentum

02 KNOWING YOUR AUDIENCE

When you're building a business case knowing your audience is critical. Your business case isn't just about what you want to change, it's about who needs to support it and why it matters to them.

If you don't tailor your pitch to your audience, even the best reasons for change can get shot down or ignored.

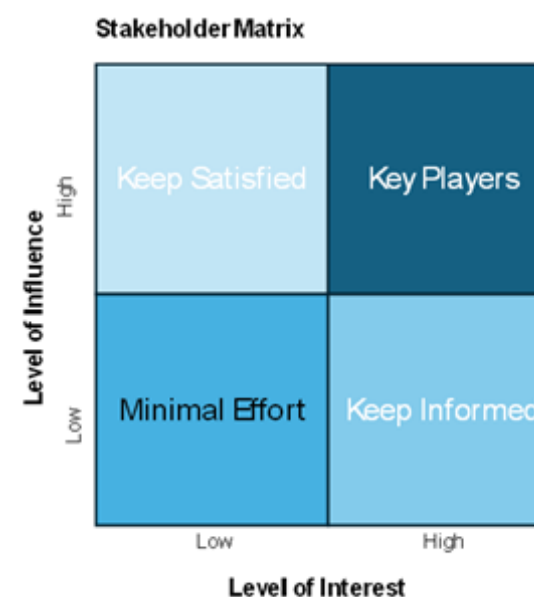
Before writing a single sentence, know who you're writing for. When you know your audience, you can:

Speak their language A CFO will care about the financial return on the investment. A Head of Operations will care what efficiencies will be created by the change. The unions will care about staff wellbeing and how jobs and terms and conditions will change. Remember one message does not fit all.

Anticipate resistance Understanding your audiences' fears, concerns or competing priorities helps you reach out to them and proactively address issues before they potentially derail your initiative.

Build alliances People support what they help shape. Knowing who needs to feel involved or consulted can be the difference between buy-in and brush-off.

Make it relevant Stakeholders are more likely to support change if they can see how it solves their problem, not just yours.



Stakeholder mapping

- Create a stakeholder matrix (influence vs interest) to identify everyone who has a stake in your change project and to understand their level of influence, interest, and attitude toward the change.
- Consider who will make the decisions? Who will be most affected by the change? Who are your allies and sceptics?
- Tailor your tone and use appropriate language for example, financial and risk mitigation for finance leaders; the people experience and productivity for line managers; culture and job changes for unions.
- Think of it like drawing a map before starting a journey. It shows you who you need to engage, what matters to them, how best to communicate with them and where the resistance or support lies

If you build your business case with this insight front and centre, you'll find your message resonates better, your resistance drops, and your chances of success skyrocket.

03 CLEAR AND COMPELLING PROBLEM STATEMENT

Clarify the Problem

It's one of the most important parts of your business case but often gets glossed over. But if people don't feel or understand the problem, they won't care about your solution.

A problem statement is a concise summary of what's wrong, why it matters, and what happens if nothing changes. It sets the stage for the rest of your business case by making the issue real, urgent, and impossible to ignore by showing the cost of inaction in a way that resonates with the people who need to say "yes" to your idea.

A strong problem statement that grabs attention makes your decision makers sit up and think, "Okay, this is something we need to fix." It ensures everyone's on the same page, agreeing there's a problem. Highlighting the risks of doing nothing helps to push your project up the priority list. The solution should be a logical and strategic response to this problem. The better you define the problem, the more obvious and necessary your solution becomes.



Quick Checklist for Writing a Problem Statement

- Is it fact-based (not emotional or vague)?
- Does it link to strategic or financial impact?
- Does it clearly show the risk or cost of doing nothing?
- Does it hint at the opportunity for improvement?
- Would a senior leader care about this problem?

04 WHY FINANCIALS MATTER

Data Driven Return on Investment

Now that you've defined the problem and the risks of doing nothing, it's time to focus on the numbers.

Financial data turns a compelling story into a credible investment. Senior leaders need to understand how your proposed change will protect, save, or generate money and how it aligns with the organisation's commercial goals.

A strong business case doesn't just highlight the emotional or ethical reasons for change it translates those into measurable outcomes:

- What will this cost if we do nothing?
- What will it cost to fix?
- What will we save, avoid, or gain if we act now?

This is where your return on investment (ROI) comes in. By connecting your people strategy to financial impact; reducing turnover, improving productivity, cutting absence costs, protecting reputation, you move from "nice to have" to "business-critical."



Break it down:

- **Financial:** Cost avoidance (e.g., legal claims, recruitment spend), savings (efficiency gains)
- **Strategic:** Alignment to business goals (growth, innovation, ESG)
- **Risk reduction:** Compliance, litigation, reputational risk



Our absenteeism reduction strategy, costing £45,000 annually, is projected to save £120,000 in lost time and reduce grievances by 30%."

05 TELL THE STORY OF CHANGE

Build Support

Even the most data-driven, well-thought-out business case can fall flat without clear and compelling communication.

Change doesn't start with strategy, it starts with a story.

If people can't see themselves in the change, understand why it matters, or feel emotionally connected to the journey, they'll tune out. That's when resistance grows, rumours spread, and transformation stalls.

That's why communicating the story of change is not just a final step, it's an integral part of your business case. People need to know why change is happening, what's in it for them, and how they'll be supported. It builds trust and reduces resistance because when people feel informed and included, they're less likely to fear or fight the change.

Keep momentum going with consistent messaging to maintain energy, focus, and alignment across the organisation.



A 6 Step Framework

Here is a simple 6 step framework that helps you to structure the story of your change initiative in a way that is clear and motivational answering the core questions people always have in the face of change:

- 1 Start with the 'why' explaining the need for the change clearly. Don't be vague - be honest and specific.
- 2 Outline the vision for change describing the "better future" that's inspiring and inclusive.
- 3 Explain the plan outlining the steps - not outcomes - how you'll get from here to there.
- 4 Clarify what's expected and empower people to get involved.
- 5 Anticipate concerns, tackle fears, doubts, and potential resistance head-on which builds credibility and trust.
- 6 Have a call to action giving people something to do - ask questions or attend a workshop

06 BUILD SUPPORT BY CO-CREATION

This is one of the most powerful tools in the HR change leader's toolkit. It shifts the mindset from “telling people what’s changing” to “building the change with them.”

It involves employees, stakeholders, or service users directly in designing and shaping change, from the beginning, not just after the decision has been made bringing people early into the process to share ideas, challenge assumptions, and help build solutions.

This might include:

- Focus groups and workshops
- Collaborative strategy sessions
- Employee experience mapping and feedback loops



Why Co-Creation Matters?

- It helps to build trust and transparency because when people feel involved, they’re more likely to trust the process
- It increases buy-in because people support what they help create.
- It improves the quality of solutions as it helps uncover blind spots and lived experiences
- It boosts engagement - not every idea will be adopted but it signals that people are valued, heard, and respected
- It supports long-term sustainability because when it’s co-created, it sticks, built into the way people think and behave.



"We turned three blockers into advocates just by involving them in the early drafting phase." —
People Transformation Lead, Manufacturing

07 CONCLUSION

The Power of the Business Case in Driving Change

Change doesn't just happen because we want it to. It happens when we've built the case for why it matters, what it will deliver, and how we'll bring people with us.

A well-crafted business case is your foundational tool for influence setting out the conditions for change to be taken seriously. It shows you've thought strategically, financially, and systemically and given your change initiative weight, credibility, and momentum.

- Clearly defining the problem and the risk of inaction
- Showing the financial impact and return on investment
- Aligning with business priorities and stakeholder priorities
- Telling a story of change that's inspiring and credible
- Building trust and engagement by co-creation to improve solutions
- Planning for sustainability not quick fixes

When budgets are tight and expectations are tighter, your ability to build a persuasive, data-backed, people-focused business case is a critical leadership skill.



PHARMA CASE STUDY

An Example: A UK Pharmaceutical Company Champions Mental Health

Using data and benchmarking this example provides a high level business case outline to secure approval and funding for a wellbeing programme with commercial outcomes.

Executive Summary

To secure executive sponsorship for a two-year mental health framework "Thriving Together" and approve budget of £250,000 .

The Challenge

- Over the last 3 years our business is experiencing a significant increase in stress-related absence
- In particular in the last 12 months our clinical divisions have experienced an acute 18% increase in stress-related absence (1,340 working days lost) costing the business £335,000
- We have seen 38% increase in mental health related self-referrals and 8% above average attrition rates for key roles costing on average £184,000 this year
- The results from our employee survey and exit interviews suggest high levels of emotional and psychological exhaustion and burnout

Business Risks

If unaddressed the business is exposed to continued productivity loss, reputational damage, and legal exposure under the Health and Safety at Work Act 1974 and Equality Act 2010. Moreover, the high attrition rates and loss of expertise will delay critical clinical development timelines, ultimately increasing time-to-market for new drugs and risking the company's competitive edge.

The Business Opportunity

- WHO (2019) report suggests every £1 invested in mental health returns £4 - £5 in productivity
- Deloitte (2022) suggest mental ill-health costs UK employers up to £56bn per year
- Peer benchmarking:
 - PharmaCo showed 40% uplift in engagement and 27% reduction in absence post-implementation
 - EthicalMed UK saw 2:1 ROI from digital CBT and manager training

Our Proposed Solution

To build on the successful pilot and roll out the Thriving Together Framework across the business

1. Manager mental health training
2. Peer-led mental health champion network
3. Digital platform access (CBT, counselling, self-help tools)
4. Quarterly pulse checks on wellbeing
5. Leadership roundtables to embed culture shift

The Pilot Project – Co-Creation in Action

Working with R&D, Finance and Operations departments to manage

- 4 focus groups across the teams listening to concerns and suggestions
- 235 survey responses (78% completion rate)
- 1:1 interview with 10 managers

Results: Over the 12-week duration, the pilot gained both positive qualitative and quantitative feedback

- Credibility, relevance, and early buy-in from key influencers
- 30% reduction in stress-related absence
- 25% increase in wellbeing scores

Financial Case

Total budget requested: £250,000 (over 2 years)

- Year 1: £165,000
- Year 2: £85,000

Estimated return on investment: £1,000,000 + over 3 years based on 4:1 ROI

Our Ask

To approve the programme as a strategic wellbeing initiative and budget required.

References

- WHO (2019) Mental Health in the Workplace
- Deloitte UK (2022) Mental Health and Employers: The Case for Investment
- HSE (2023) Work-related Stress Statistics
- CIPD (2023) Health and Wellbeing at Work Report

08

ARE YOU READY TO TAKE THE NEXT STEP?

Are you ready to find out more?

If you're ready to build a standout business case or need support crafting one that resonates at the C suite level, let's talk.

Book a free strategy call today! Let's turn your vision into action!

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