# Company Name

*[In italics we’ve added tips on what we want you to consider when filling out each section – please remove all italics in the final copy you send to us. This is not an exhaustive list – you can add to this template (e.g. customer analysis, sales projection analysis, etc.) if you think it will support your project proposal. Think about this as an opportunity to explain why this is an excellent investment – what you would need to make a convincing case to a potential shareholder.]*

**Problem Statement**

*[What is the problem that the project is supposed to solve? Identify the area/s where there are issues that need to be addressed, e.g inefficiencies, missed opportunities, unacceptable market performance or unfavorable customer response to a product or service.]*

**Analysis of the Situation**

*[How did this situation come about? What led to you wanting to implement new technology into your business? If you do not go ahead with this project, what will that mean for your business? What is the full weight of the impact? Please be realistic.]*

**Solution Options**

*[Identify potential solutions to the problem and describe them sufficiently. If, for example, the solution proposed is the implementation of* [*desktop virtualization*](http://searchvirtualdesktop.techtarget.com/definition/desktop-virtualization)*, you would define the term and discuss the use of the technology within your industry. What are your options in terms of tackling this problem? The first solution should be ‘status quo’ – if you do nothing and everything stays the same. The next solutions should be all the options you have considered, including the project you are proposing.]*

**Cost-benefit Analysis**

*[This section evaluates the costs and benefits for all options, including the proposed solution to the problem and any likely alternatives -- which include, of course, taking no action at all. Illustrate your case with data from similar projects, if possible. Charts and graphs are often included in this section or may be added in an appendix at the end. The* [*cost-benefit analysis*](http://whatis.techtarget.com/definition/cost-benefit-analysis-CBA) *should include the projected financial benefit to the company and a projection of when that payoff is expected.]*

**Project: Advanced Technology Solution Proposed**

*[Describe what the technology/equipment is. Explain what it can do for you that your current in-house technology cannot do in terms of new capability (e.g. capacity, productivity, speed, precision, new product development, etc.). How does this allow you to do something different? If it is an add-on to existing technology, please explain. If you are replacing your existing technology, please explain the plan for the ‘old’ technology. If you are keeping your ‘old’ one, explain why. Explain how this technology is considered to be ‘Advanced’ (for example, think about: Is this new in the industry? Is this new amongst your competitors? Is it going to change how you do business? Is this advanced for your business now?)]*

**Jobs**

1. **Growth**

*[How many jobs are you proposing to create? How many new, non-current employees, will you have to hire for this position? Detail the specific roles with the title of the position. For each role, detail the projected timeline for each hire and whether the role is full time/part time/contract. Explain whether the role is directly or indirectly related to the outcome of the project. Direct means you will hire for that role no matter what. Indirect means that you will hire for that role based on dependencies, for e.g. if you get a contract, if sales increase, etc.]*

1. **Jobs at Risk**

*[Are there jobs at risk? Why are these jobs at risk? Will this technology eliminate positions in the company? If so, what are those roles? Are you re-deploying or up-training existing staff within your company who are at risk with this new project?]*

**Exports**

1. **Potential growth**

*[How will this maximize your export potential? How will this project help you grow the export sales?*]

1. ***Markets***

*[Which markets have you identified as potential markets that can increase your export sales with this project? Are there any new markets or markets you have minimal visibility in? If so, please outline what your export plan is in terms of capturing or expanding in these markets?]*

1. **Customers**

*[Who are your target customers? Be specific as to who they are and differentiate the ones you have an existing relationship with from those you do not. Have they expressed interest already? If so, do you have supporting letters? Do you have orders/contracts from these customers already? If so, attach copies.]*

**Concluding Statements**
*[This is where you make your ‘sales pitch’. Describe the key aspects of your plan that will ensure ongoing business success as a result of this project. For instance, tell us why your project plan should lead to increased competitiveness, productivity, and growth or long-term sustainability for your business. What differentiates this project (in terms of impact)?]*