

Digital Adoption Business Case

A one-document case for investing in a digital adoption platform, ready to adapt for your leadership team

How to use this template: replace everything in [square brackets]. Use the AdoptionStack ROI calculator (adoptionstack.com/calculators/adoption-roi) to fill in the benefits section, and keep the final document to three or four pages.

1. Executive summary

[In three or four sentences: the problem, the proposed solution, the expected benefit and the investment requested. Example: "Sales reps are not using our CRM consistently, costing an estimated \$X a year in lost productivity and poor forecasting. We propose a digital adoption platform to guide reps in the flow of work. We expect \$Y in annual benefits for a total cost of \$Z, paying back in N months."]

Item	Summary
Investment requested	[\$ per year, contract length]
Expected annual benefit	[\$]
Return on investment	[X%]
Payback period	[N months]
Decision needed by	[Date]

2. The problem

[Describe the current situation with evidence. Which applications are affected? How many users? What is going wrong?]

- [Low usage: X% of licensed users are active in the application each month]
- [Support load: X how-to tickets per month about the application]
- [Data quality: X% of key records are missing required information]
- [Slow onboarding: new hires take X days to become productive]

3. Proposed solution

[Describe the digital adoption platform and how it will be used: in-app walkthroughs for key workflows, contextual tips, a self-help widget and analytics. Name the shortlisted vendors if known.]

Scope of phase one

Application	Users	Workflows covered	Go-live
[e.g. CRM]	[800]	[Opportunity creation, call logging, forecasting]	[Month]
[Application]	[Users]	[Workflows]	[Month]

4. Benefits

Benefit	How it is calculated	Annual value
Fewer how-to tickets	[tickets per month] × 12 × [reduction %] × [cost per ticket]	[\$]
Faster onboarding	[new hires] × [days saved] × [daily loaded cost]	[\$]
Better data quality	[describe the cost of errors avoided]	[\$]
Licence utilisation	[value of licences that become actively used]	[\$]
Total annual benefit		[\$]

Non-financial benefits: [better employee experience, more accurate forecasting, faster change for future process updates].

5. Costs

Cost	Year 1	Year 2	Year 3
Software licence	[\$]	[\$]	[\$]
Implementation services	[\$]	[\$0]	[\$0]
Internal content authoring time	[\$]	[\$]	[\$]
Training and administration	[\$]	[\$]	[\$]
Total	[\$]	[\$]	[\$]

6. Risks and mitigations

Risk	Mitigation
Guidance breaks when the application updates	Assign an owner to review content after each release
Low engagement with guidance	Focus on high-value workflows and promote via managers
Ongoing authoring effort is underestimated	Budget part of a role from day one
[Risk]	[Mitigation]

7. Timeline

Milestone	Date
Vendor selection and contract	[Date]
Deployment and first workflows built	[Date]
Pilot with one team	[Date]
Full launch	[Date]
First results review (day 90)	[Date]

8. Recommendation

[State the decision you are asking for. Example: "Approve a [one]-year contract with [vendor] for [application], with a 90-day review against the success metrics above before expanding to further applications."]

Related: adoptionstack.com/blog/whatfix-pricing explains how DAP pricing works, and adoptionstack.com/blog/digital-adoption-metrics lists the metrics to track.