Completed Business Case Example: Hospital

This example shows a completed one-page case for a chief engineer at a mid-size hospital.

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Department	Facilities and Plant Operations	**Date**	[Date]
Submitted to	Director of Facilities	**Reviewed with coach**	☒ Yes, with the Manager of Clinical Engineering

1. The Need

Departmental challenge	Our preventive maintenance backlog has grown from about 140 to 260 open work orders over the past 12 months. Our last accreditation survey also identified three findings related to maintenance records.
Why it matters now	The findings must be resolved before the next survey visit. A growing backlog also increases the risk of unplanned equipment failures in patient care areas.

2. Proposed Training

Course and format	An online facility operations course from an established training provider, covering maintenance planning, maintenance records and regulatory readiness.
Schedule and hours	Eight weeks, starting in [month], about four hours of study per week, mostly outside peak hours.
How it connects to the need	The course modules on preventive maintenance planning and maintenance records align directly with the backlog and the survey findings.

3. Expected Benefits

What it should help improve	A more organized preventive maintenance program, more complete maintenance records, and better readiness for the next survey.
How I will track progress	Monthly backlog totals from our maintenance management system, and the status of open survey findings.

4. Cost and Time

Direct cost	Tuition of $[amount] (provider quote attached). No travel or exam fees.
Time away	About four hours per week for eight weeks, scheduled around generator testing and survey preparation.
Coverage plan	The assistant chief engineer will handle routine scheduling during study periods. I remain on call for urgent issues.
Return, in plain terms	Repeat contractor calls for the same failures cost about $1,200 each. If better planning prevents even one or two calls a year, the savings would cover most or all of the tuition.

5. How I Will Apply It

Changes I will make	Revise the preventive maintenance schedule by priority, update our maintenance record templates, and close the open survey findings.
How I will report back	A one-page progress report to the Director of Facilities at the end of the course and again three months later.

All names and figures in this example are illustrative. Replace them with your own.