



REFINE

# Build the Business Case With the Buyer

Turn value assumptions into a credible case for action.

*Do not calculate value at the buyer. Build it with them.*

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Suncoast Spark · Free Resource for B2B Account Executives

# The business case starts with the problem, not the calculator.

Use this worksheet to anchor value in a real, documented business problem before any numbers are introduced.

|                          |                                                                                   |
|--------------------------|-----------------------------------------------------------------------------------|
| CURRENT BUSINESS PROBLEM | What is happening today?                                                          |
| WHO IS AFFECTED          | Which teams, customers, or stakeholders experience the problem?                   |
| CURRENT APPROACH         | How is the organization handling this today?                                      |
| BUSINESS CONSEQUENCE     | What does the current state create in cost, risk, lost revenue, delay, or effort? |
| FREQUENCY                | How often does the problem occur?                                                 |
| SCALE                    | How many people, transactions, customers, locations, or processes are affected?   |
| COST OF DELAY            | What happens if nothing changes?                                                  |

📌 IF THE BUSINESS PROBLEM IS STILL VAGUE, THE BUSINESS CASE IS PREMATURE.

# Look for value in four places.

Every meaningful business problem connects to at least one of these categories. Identify which apply — and which the buyer cares about most.

## REVENUE

- Increased conversion
- Increased retention
- Larger deal size
- Reduced churn
- New market or customer opportunity

*"What changes financially if this problem is solved?" "Where is revenue being lost or constrained today?"*

## COST

- Reduced labor
- Fewer manual steps
- Lower operating expense
- Reduced rework
- Tool consolidation

*"How much time or effort does the current approach consume?" "What cost exists because the current process is inefficient?"*

## RISK

- Compliance exposure
- Customer risk
- Operational failure
- Security risk
- Employee or talent risk

*"What could happen if this remains unresolved?" "What exposure is leadership trying to reduce?"*

## SPEED

- Faster decision making
- Shorter cycle time
- Faster onboarding
- Faster time to value
- Faster execution

*"What would become faster if this problem were solved?" "What is the cost of the current delay?"*

# Not every number deserves the same confidence.

Before building the case, classify every input. The buyer — and their Finance team — will distinguish between these whether you do or not.

## BUYER-CONFIRMED

Numbers, facts, or outcomes explicitly supplied or validated by the buyer.

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### Examples:

- Current headcount
- Current cycle time
- Known revenue loss
- Current operating cost
- Agreed success metric

## CALCULATED

Math based directly on buyer-confirmed inputs.

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### Example:

Buyer confirms: 1,000 transactions per month · 10 minutes of manual work per transaction

**Calculated annual time: 2,000 hours**

## ASSUMPTION

Seller estimate or benchmark not yet validated.

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### Examples:

- Expected adoption rate
- Estimated productivity improvement
- Assumed percentage improvement
- Generic industry benchmark

❏ DO NOT PRESENT ASSUMPTIONS AS ROI. Label them. Validate them. Replace them with buyer evidence whenever possible.

# Build the Case

Complete this worksheet with the buyer. Every blank that cannot be filled is a gap in the case.

|                               |
|-------------------------------|
| BUSINESS PROBLEM              |
| CURRENT STATE                 |
| BUSINESS IMPACT               |
| RELEVANT VOLUME / SCALE       |
| CURRENT COST / LOSS / RISK    |
| POTENTIAL IMPROVEMENT         |
| ESTIMATED ANNUAL EFFECT       |
| COST OF SOLUTION              |
| TIME TO VALUE                 |
| IMPORTANT ASSUMPTIONS         |
| BUYER VALIDATION STILL NEEDED |

*Use ranges when precision is not credible. A defensible estimate is better than a false exact number.*

# Would the buyer's Finance team believe this?

Run the case through this checklist before presenting it. Every "no" is a gap worth closing now rather than in the room.

- ☐ Are the inputs traceable to buyer evidence?
- ☐ Would the economic buyer recognize the problem and impact?
- ☐ Are assumptions clearly labeled?
- ☐ Is the time horizon realistic?
- ☐ Have implementation cost and effort been considered?
- ☐ Have we avoided double-counting value?
- ☐ Does the expected improvement seem credible?
- ☐ Is the benefit connected to an actual business priority?
- ☐ Can the customer explain the case without us?
- ☐ What number would the buyer challenge first?

A strong business case survives scrutiny. A weak one depends on no one asking questions.

Before you present the case externally, identify the one number or assumption most likely to be challenged — and address it first.

# The numbers need a story the buyer can carry internally.

*"If you had to explain why this investment deserves budget compared with everything else competing for attention, what would you say?"*

|   |                                                         |
|---|---------------------------------------------------------|
| 1 | <b>THE PROBLEM</b><br>What is happening?                |
| 2 | <b>THE IMPACT</b><br>Why does it matter?                |
| 3 | <b>WHY NOW</b><br>Why address it now?                   |
| 4 | <b>THE CHANGE</b><br>What will be different?            |
| 5 | <b>THE VALUE</b><br>What business result could improve? |
| 6 | <b>THE EVIDENCE</b><br>What supports the case?          |
| 7 | <b>THE DECISION</b><br>What needs to be approved?       |



THE BEST BUSINESS CASE IS ONE THE BUYER CAN RETELL WITHOUT YOU.



AE ON DEMAND

# The business case should reflect the buyer's economics, not your calculator.

AE on Demand helps account executives organize buyer evidence, separate known facts from assumptions, identify missing value inputs, create business-case hypotheses, and pressure-test the case inside ChatGPT or Claude.

## Use it to ask:

- "What evidence do I have for the business case?"
- "What assumptions am I making?"
- "What inputs still need buyer validation?"
- "How should I structure this for the economic buyer?"

Explore AE on Demand at [aeondemand.com](https://aeondemand.com)