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COURSE BROCHURE

# Return on Investment Cases for Business Initiatives Training Course

31 May – 4 June 2027
London

# Return on Investment Cases for Business Initiatives Training Course

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Return on Investment Cases for Business Initiatives is a 1-week training course for finance managers, business analysts and project sponsors who must show what an initiative will repay, with each participant building a return on investment case with tracking measures for one initiative. Boards now fund fewer initiatives and expect each one to prove its benefits after launch, not only before approval. Jupiter Prime Training offers this course on return on investment cases.

## Why Return on Investment Cases Matter Now

Three pressures shape return on investment cases today. Capital is rationed more tightly, so investment committees compare initiatives side by side and reject those with vague benefits. Digital change spreads costs across several budgets. Sponsors are also asked to report realised benefits months after go-live, so a case written only to win approval quickly loses credibility. The course rests on discounted cash flow, payback analysis and benefit attribution, explained in plain terms.

## Who Gains Most from Return on Investment Cases

- Finance partners responsible for testing the cost and benefit assumptions behind funding requests
- Business analysts responsible for turning operational change into measurable benefit lines
- Initiative sponsors accountable for the promised returns once the change goes live
- Portfolio and investment committee secretaries who rank competing proposals
- Operations leads who own the baseline figures that benefits are measured against

A sponsor, a finance partner and an analyst from the same initiative gain most when they attend together and build one shared case.

## Return on Investment Cases Capabilities

Participants leave able to move from a loose list of hoped-for gains to a costed, discounted and trackable case that a committee can challenge and a sponsor can defend.

- Identify cash and non-cash benefits and map each to an accountable owner — sponsor sign-off
- Capture one-off, recurring and hidden costs across every affected budget — funding approval
- Apply attribution rules that separate the initiative's effect from other changes — benefit claims
- Calculate payback period and net present value under several scenarios — investment committee ranking
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Test sensitivity to the assumptions that move the result most — risk appetite discussions
- Design tracking measures and review points for realised benefits — post-launch reporting

## Key Return on Investment Cases Terms

- Return on investment — the net gain from an initiative divided by its cost.
- Net present value — the sum of future cash flows discounted to today, minus the initial outlay.
- Payback period — the time an initiative takes for its cumulative net cash inflows to recover the money invested.
- Discount rate — the rate used to convert future cash flows into today's value.
- Benefit attribution — the method of deciding what share of an observed improvement was caused by the initiative itself.
- Baseline — the measured starting position of a process or cost before the initiative.

## Return on Investment Cases Day by Day

## Day 1: Investment Decisions and the Funding Context

- Capital Rationing and Committee Criteria — Which Initiatives Get Funded
- Strategic Fit Scoring — Linking Proposals to Stated Business Priorities
- Do-Nothing Option Analysis — Cost of Delay and Status Quo
- Stakeholder Map of Benefit Owners — Who Signs for Each Gain
- Case Structure From Problem to Recommendation — Committee Reading Order

## Day 2: Benefit Identification and Baselines

- Benefit Mapping From Outputs to Outcomes — Measurable Benefit Lines
- Cash Versus Non-Cash Benefits — What Counts in the Financial Case
- Baseline Measurement and Data Sources — Credible Starting Position
- Avoiding Double Counting Across Initiatives — Clean Portfolio Totals
- Benefit Valuation Techniques for Time and Quality — Monetised Claims

## Day 3: Cost Capture and Attribution

- Whole-Life Cost Build-Up — One-Off, Running and Exit Costs
- Hidden and Shared Costs Across Budgets — Full Cost Visibility
- Attribution Rules and Control Groups — Separating Initiative Effects
- Contribution Analysis for Joint Initiatives — Fair Benefit Splits
- Contingency and Optimism Bias Adjustments — Realistic Cost Estimates

## Day 4: Payback, Discounting and Sensitivity

- Payback Period Calculation — Liquidity and Speed of Recovery
- Discounted Cash Flow and Net Present Value — Long-Term Worth
- Choosing a Discount Rate — Cost of Capital and Risk Premium
- Scenario and Sensitivity Tables — Assumptions That Swing the Result
- Comparing Mutually Exclusive Options — Ranking by Value and Payback

## Day 5: Practising the Return on Investment Case

- Benefit Register With Named Owners — Applying Day 2 Mapping
- Cost and Attribution Schedule — Applying Day 3 Build-Up
- Financial Summary With Scenarios — Applying Day 4 Calculations
- Tracking Measures and Review Calendar — Realised Benefit Reporting
- Return on Investment Case With Tracking Measures — Committee Presentation

## Applying Return on Investment Cases After the Course

- Rebuild the benefit register of one live initiative with named owners, baselines and attribution rules.
- Run a sensitivity review of a pending funding request, showing the committee which three assumptions move net present value most.

## Return on Investment Cases Questions FAQ

### What are return on investment cases and why do they matter now?

Return on investment cases set out the costs, benefits and financial return of a proposed initiative. They matter now because committees fund fewer initiatives and expect sponsors to prove realised benefits after launch, from faster loan processing in banking to lower stock losses in retail.

### Which roles gain most from return on investment cases training?

Finance partners, business analysts and initiative sponsors gain most from return on investment cases training. Finance partners test assumptions, analysts turn change into benefit lines, and sponsors answer for the promised returns.

### How does a return on investment cases course differ from a capital budgeting course?

A return on investment cases course focuses on single business initiatives and on tracking their benefits after approval. A capital budgeting course looks at long-term asset investment across a whole portfolio.

### What do you bring back from a return on investment cases course?

You bring back a completed case for one initiative from your own organisation. It holds a benefit register with owners, a whole-life cost schedule, payback and net present value under several scenarios, and tracking measures.

## Return on Investment Cases: The Way Forward

The return on investment case with tracking measures first informs the funding decision on one initiative. Sponsors use it to defend the proposal, finance partners use it to test assumptions. After the first review point, revisit the attribution rules, since observed results often show which gains truly came from the initiative.