

The SAP business case playbook

How to build, defend and deliver a high-
value SAP transformation





Introduction

Every SAP transformation starts with a question. Is this investment worth it?

It's a question that boards, executives, finance leaders, and programme sponsors will ask repeatedly throughout the lifecycle of a transformation. While the technical case for moving to S/4HANA or modernising legacy ERP systems is often clear, securing organisational commitment requires something far more compelling than a technology upgrade. It requires a business case.

A strong business case creates alignment between technology investment and business strategy. It provides stakeholders with confidence that the programme will deliver measurable value and helps organisations make informed decisions about priorities, funding, resources, and expected outcomes.

Yet many organisations struggle to move beyond a list of features, functions, and technical benefits. As a result, transformation programmes can start without a clear view of what success actually looks like.

This playbook explores how organisations can build a credible, realistic, and value-driven SAP business case that stands up to scrutiny and supports successful transformation from planning through to benefits realisation.

Why business cases matter

An SAP programme is rarely undertaken simply to replace software. Most organisations are seeking to achieve broader objectives, such as:

- Improving operational efficiency
- Reducing costs
- Increasing agility
- Simplifying business processes
- Supporting growth
- Improving reporting and visibility
- Strengthening compliance
- Enhancing customer and employee experiences

Without a well-defined business case, it becomes difficult to understand whether the programme is delivering the outcomes it was designed to achieve. A business case should do more than secure funding. It should serve as a guiding framework throughout the programme, helping leaders evaluate decisions, prioritise investments, and measure success.

The difference between a technical case and a business case

One of the most common mistakes organisations make is confusing technical necessity with business value. A technical case may focus on:

- End-of-support deadlines
- Legacy system limitations
- Infrastructure challenges
- Security concerns
- Technical debt

While these are legitimate drivers for change, they rarely inspire executive enthusiasm on their own. A business case focuses on outcomes. It answers questions such as:

- How will this improve performance?
- What efficiencies will be gained?
- What costs will be reduced?

What risks will be mitigated?

How will this support strategic growth?

The strongest SAP business cases connect technical change to meaningful business results.

The five building blocks of a strong SAP business case

1. Define the strategic drivers

Before discussing technology, organisations should establish why change is needed.

These drivers often include:

Supporting growth ambitions

Reducing operational complexity

Improving decision-making

Enabling digital transformation

Modernising outdated processes

Responding to regulatory requirements

Every investment should align with broader business objectives. If stakeholders cannot clearly explain why the programme matters, it becomes difficult to sustain support when challenges arise.

2. Understand the current state

A compelling business case starts with an honest assessment of where the organisation is today. Questions to consider include:

Which processes create inefficiencies?

Where are manual workarounds occurring?

What reporting limitations exist?

How much technical debt has accumulated?

Which systems are costly to maintain?

Current-state assessments provide the evidence needed to justify change. More importantly, they establish the baseline against which future improvements can be measured.

3. Identify tangible and intangible benefits

Many organisations focus exclusively on hard financial benefits. While these are important, they only capture part of the value story.

Tangible benefits

These can typically be measured financially.

Examples include:

- Reduced operating costs
- Lower infrastructure spend
- Process efficiencies
- Productivity improvements
- Inventory reductions
- Reduced maintenance costs

Intangible benefits

These may be more difficult to quantify but can still have significant value.

Examples include:

- Improved employee experience
- Better customer service
- Increased organisational agility
- Enhanced decision-making
- Improved compliance
- Stronger data visibility

The most compelling business cases combine both.

4. Quantify value realistically

One of the quickest ways to undermine credibility is through unrealistic benefits forecasting. Executives have seen ambitious promises before. They are far more likely to support a business case built on realistic assumptions and evidence.

When quantifying benefits:

Use available operational data

Engage business stakeholders

Validate assumptions

Consider implementation costs

Account for adoption timelines

The objective is not to create the largest possible number. It is to create a number that leaders trust.

5. Define success early

Many SAP programmes struggle because success was never clearly defined. A business case should establish measurable outcomes from the outset. Examples may include:

Reduction in month-end close times

Faster reporting cycles

Improved inventory accuracy

Reduced operating costs

Increased automation

Improved user satisfaction

Enhanced data quality

Defining success early creates accountability and allows benefits to be tracked over time.

Building executive support

Even the strongest business case can fail if executive stakeholders are not aligned. Different leaders often view SAP programmes through different lenses.

CFOs

Typically focus on:

Costs

Return on investment

Benefits realization

Financial risk

CIOs

Often prioritise:

Technology strategy

Platform modernization

Security

Scalability

COOs

Focus on:

Operational efficiency

Process improvement

Productivity gains

CEOs

Want to understand how the programme supports broader business goals and competitive advantage.

Successful business cases address all of these perspectives. The goal is not simply approval. The goal is sustained sponsorship throughout the transformation.

The importance of benefits realisation

A business case should not disappear once funding has been approved. Unfortunately, this happens more often than many organisations would like to admit. Benefits realisation should remain an active programme discipline throughout delivery and beyond go-live.

This means regularly asking:

Are expected benefits still achievable?

Are assumptions still valid?

What has changed?

Are additional actions required?

Benefits realisation bridges the gap between project delivery and business outcomes. It transforms the business case from a planning document into a management tool.

Common mistakes that weaken business cases

Even organisations with strong programmes can fall into predictable traps.

Focusing on technology instead of outcomes

Executives invest in business improvements, not software features.

Overestimating benefits

Inflated assumptions can damage confidence later.

Underestimating change management

Technology alone rarely delivers value. People, processes, and adoption often determine whether benefits are realised.

Failing to engage stakeholders

Business cases developed in isolation often face resistance later.

Treating the business case as a one-off exercise

Value should be monitored and measured throughout the programme lifecycle.

Turning strategy into action

A successful SAP business case doesn't just explain why transformation should happen. It provides a roadmap for how value will be delivered. This requires organisations to connect:

Strategic objectives

Programme scope

Delivery plans

Change activities

Adoption strategies

Benefits tracking

When these elements remain aligned, the likelihood of successful transformation increases significantly.

Measuring success beyond go-live

Go-live is an important milestone, but it is not the finish line. Some of the most significant benefits of SAP transformation are realised months or even years after implementation.

Leading organisations continue to track:

Operational performance

Process efficiency

Cost reduction

User adoption

Data quality

Customer outcomes

Strategic business benefits

Maintaining this focus ensures the programme delivers lasting value rather than simply achieving technical deployment.

Lessons from successful transformations

Organisations that consistently achieve positive outcomes from SAP programmes tend to share several characteristics:

They start with business objectives, not technology requirements.

They build realistic and evidence-based business cases.

They involve stakeholders early.

They define measurable outcomes.

They actively manage benefits realisation.

They maintain executive engagement throughout delivery.



Most importantly, they recognise that transformation is about creating business value, not simply implementing software.

Final thoughts

A well-constructed SAP business case is much more than a funding document. It provides clarity, alignment, and direction throughout the transformation journey. It helps organisations make better decisions, build stakeholder confidence, and maintain focus on the outcomes that matter most.

The most successful SAP programmes don't begin with a discussion about systems. They begin with a clear understanding of what the business is trying to achieve and how success will be measured.

When built correctly, the business case becomes the foundation for every decision that follows. And ultimately, it becomes the benchmark against which the success of the transformation is judged.

About TCT

At TCT, we help organisations build robust business cases that connect SAP investment to measurable business outcomes. From programme mobilisation and assurance through to governance, benefits tracking, and delivery oversight, we work alongside our clients to ensure transformation programmes remain aligned to their strategic objectives.

Planning an SAP transformation? Speak to TCT about creating a business case that secures stakeholder confidence and delivers measurable value.

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