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### Article information:

To cite this document:

H. Frank Cervone, (2008) "Developing the business case for a digital library project", OCLC Systems & Services: International digital library perspectives, Vol. 24 Issue: 1, pp.18-21, <https://doi.org/10.1108/10650750810847206>

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## MANAGING DIGITAL LIBRARIES: THE VIEW FROM 30,000 FEET

# Developing the business case for a digital library project

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### Abstract

**Purpose** – The purpose of this paper is to develop an understanding of the role comprehensive business cases can have in ensuring the successful adoption of a digital library project.

**Design/methodology/approach** – Using theory and practice from information technology in both profit and non-profit organizations, the author develops a methodology for developing a successful business case for digital library projects.

**Findings** – One of the major tasks a digital library project manager faces is getting their project approved and in the queue for development. By exploiting the full potential of the planning phase of the SDLC (systems development lifecycle), a digital project manager can develop a compelling business case for their proposed project. By using SWOT analysis as well as additional considerations, the project manager should identify how the project will address critical organizational (business) issues and success factors as well as provide a compelling case for action. In particular, the most successful business cases develop compelling cases for action by carefully crafting solid arguments for why the digital project being proposed is the most important project an organization to undertake out of all the potential projects that might exist.

**Originality/value** – This paper fills a gap in the digital project management literature by providing a step-by-step process for developing compelling business cases for digital library projects.

**Keywords** Digital libraries, Project management, Project planning, Business development, Information management

**Paper type** Viewpoint

One of the major issues a digital library project manager has to figure out is how to get their project approved and in the queue for development. As digital library projects generally follow the same patterns as other system development processes, wise project managers keep in mind how the SDLC (systems development lifecycle) works. By focusing on the activities that occur and decisions that are made during the planning stage of the SDLC, a project manager can greatly improve the chances of getting approval to move forward with their project.

In particular, the planning stage of the SDLC involves three general activities: project requests are reviewed, approved, and prioritized; resources are allocated; and a project team is put in place. From the perspective of getting a project moving, the most important factors to address are how to get a project approved and prioritized. One of the best ways of doing that is by creating an effective business case.

At its simplest, a business case is simply a justification for a particular proposal (Shelly *et al.*, 2008). However, as Henry (2005) has noted, “an effective business case focuses on an organizations objectives and motives”, so at the very least, an effective business case must somehow relate to the mission, objectives, and needs of an



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organization. In most situations, business cases also attempt to proactively address concerns that may be specific to an organization. A business case might also outline what capabilities are already in place that will facilitate completion of a project.

But how does a project manager begin to craft a business case? The answer relies on a tool from strategic planning: the SWOT analysis. Each part of the SWOT analysis (strengths, weaknesses, opportunities, and threats) provides clues, and sometimes direct answers, to the issues that should be discussed in a business case.

For a digital library project, some of the questions that might be asked are:

- (1) *Strengths* – what are the major strengths of our collections and how does that relate to our project? What must we do to strengthen the overall integration of our digital collections and how might this project assist in that?
- (2) *Weaknesses* – what are the major issues standing in the way of the proposed project's success? How can these issues be overcome?
- (3) *Opportunities* – what opportunities do we have, such as collaboration or coordination, that could work in favor of our proposed project?
- (4) *Threats* – what threats do we face if we do not perform this project? What threats do we face in implementing this project?

By getting input on the issues raised in the SWOT analysis from people throughout the organization, a project manager can develop a solid base of information from which they can begin crafting the business case document.

But the SWOT analysis is not sufficient for tackling all the issues that must be discussed in a business case. In addition to the SWOT analysis items, the project manager must also consider macro-level issues such as how the project will address critical organizational (business) issues and success factors as well as provide a compelling case for action.

Taking all of these into account, a project manager can create the most effective case for action by focusing specifically on how all of this supports the mission of the organization better than any other alternative course of action. Therefore, justification for the claims in a case for action should evolve from the relationships between the critical organizational issues, as defined by the goals and objectives in the organization's strategic plan, and the goals and objectives of the proposed project. Moreover, effective cases for action relate the critical success factors of the proposed project to the organizational strategic plan by explicitly describing the relationship of project outcomes to the outcomes of the organizational strategic plan.

One of the decisive factors when the final decision is made to move forward with a project is whether a project is feasible or not. Ironically, the first step in evaluating the feasibility of a project is to reject any project that does not seem to be feasible. Many managers believe that the most prudent course of action is to do nothing when they cannot decisively determine the feasibility of a project as no one wants to be associated with a project that seems “doomed to fail.”

Therefore establishing feasibility is a critical point that must come through in the case for action. Convincing an evaluator of the feasibility of a project is most effective when the case for action answers the questions that are most often asked related to feasibility. Yet, cases for action oftentimes lack some of the information managers use

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as criteria for determining whether a project is practical. A case for action should address all of the following criteria:

- (1) *Operational* – will the resulting system be used effectively once it has gone into production?
- (2) *Technical* – does the organization have the necessary resources (people, hardware, software, infrastructure) to develop/purchase and operate the system resulting from the proposed project?
- (3) *Economically* – can the organization afford to develop the proposed project and purchase all required resources? Furthermore, do the benefits associated with the proposed project outweigh the costs?
- (4) *Schedule* – can the proposed project be implemented in a reasonable amount of time?
- (5) *Cultural* – is the project a “good fit” based on the culture of the organization?
- (6) *Necessity* – is the proposed project something that is required (nondiscretionary) due to external factors or conditions (such as governmental regulations or collection material decomposition)?

New project requests are typically created for one of three reasons: as a reaction to an opportunity, as a means for resolving a problem, or as a way of responding to a directive. To completely “fill in the blanks” as to how a particular digital library project will address the needs of an organization, the project manager should provide answers for the following questions in the business case to make it clear what the basis of the project request is. An overarching framework, the business case should include details on the following items:

- (1) *Project purpose* – why is the project being requested at this time? In one sentence, what will the organization accomplish by completing this project?
- (2) *Cost* – how much will the project cost, typically broken down by software, hardware, and people expenditures?
- (3) *Duration* – when will the project be completed?
- (4) *Productivity* – what types of productivity losses will occur while the project is being developed? When the project goes into production?
- (5) *Outcomes* – how will the organization benefit? How will the outcomes be measured?
- (6) *Alternatives* – what alternatives are there to the proposed project? Why are they inferior to the proposed project?

In most libraries, the information technology unit receives far more requests than it can handle. This situation is not peculiar to libraries; it is true in just about every industry imaginable. Competition for resources is great and there is little time available to do remediation on bad project proposals. Therefore, it is in the best interest of the digital library project managers to learn from the experiences of information technology professionals in other areas and develop their talents in making the most compelling case possible for their projects as part of the initial project proposal. By doing so,

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project managers will greatly increase the likelihood of their project being selected for development and implementation.

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**This article has been cited by:**

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