OPSPLY · TRACKERS & CALCULATORS

ROI & Business Case Calculator

Build a business case that gets budget approved — fast. Turn your assumptions into a clean, defensible model that finance teams take seriously.

7
Tabs

<1hr
To complete

Board-ready
Output tab

WHAT'S INSIDE

7 tabs that take you from gut feel to a number finance believes.

1. **Universal ROI Calculator**
   Time savings, cost reduction, and revenue impact — all in one model. Handles any type of investment.
   Start here

2. **Software/Vendor ROI Model with TCO**
   Total cost of ownership analysis including implementation, training, ongoing support, and sunset costs.

3. **Payback Period & NPV Calculator**
   When does the investment pay for itself? NPV at your discount rate. The two numbers CFOs always ask for.

4. **Headcount vs. Tooling Comparison**
   The classic build-vs-buy or hire-vs-automate comparison — shows the cost of the alternative decision.

5. **Executive Summary Output Tab**
   Auto-populated from your inputs. Copy-paste directly into a budget deck or email to the CFO.
   Board-ready

6. **Sensitivity Analysis**
   Best / base / worst case modeling — shows how the ROI holds up even when things go wrong. Skeptic-proof.

7. **Assumption Documentation & Audit Trail**
   Log every assumption with its source and confidence level. Turns your model from an opinion into an audit-ready document.

HOW TO PRESENT IT

The business case structure that gets budget approved.

1. Lead with the problem cost

Quantify what inaction costs — in dollars, hours, or risk. Finance is more motivated by a $500K problem than a $200K solution.

2. Show the investment, not just the cost

Use the TCO tab to show total 3-year cost — implementation, training, ongoing. Never present just year-1 license cost or you'll be corrected in the meeting.

3. Payback period beats ROI percentage

"Pays for itself in 8 months" lands better than "340% ROI." CFOs are skeptical of large ROI percentages. Payback period feels concrete and conservative.

4. Lead the sensitivity analysis

Bring up the downside scenario before they do. "Even if we only capture 50% of the projected efficiency gains, we still pay back in 14 months." Pre-empts the skeptic's best attack.

5. Document your assumptions visibly

Use the audit trail tab. Every assumption with a source makes you look rigorous. Vague assumptions — "we assume 20% productivity gains" — get picked apart. "Based on vendor case study + our Q2 time tracking data" doesn't.

✅

Getting budget approved is half the battle. Win it.

Open the Google Sheet, input your assumptions, and have a board-ready business case in under an hour.

More trackers & calculators

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