

RESEARCH **Advanced** 45 MIN · UPDATED 2026-09-30

Build a data-backed business case for an investment decision.

Pull the supporting data together and draft the case for a faster, better-informed go/no-go decision.

MICROSOFT 365

Excel

Word

WORKS WITH

ChatGPT

Claude

Copilot

Business Outcome

A faster go/no-go decision because the supporting case is assembled and checkable, not scattered across five people's inboxes.

Workflow Steps

Step 1: Gather the underlying numbers

Excel

Pull cost estimates, expected returns, and any comparable past investments into one Excel workbook, organized as a Table per data set (costs, returns, comparables) rather than loose cells scattered across a sheet.

Named, structured data is what lets Copilot (and you, later) reference specific figures reliably when the narrative gets drafted in the next step.

Step 2: Ask Copilot to build the case from the numbers

Copilot

ChatGPT

Claude

Have it work from the Excel data outward into the Word document, so every number in the narrative traces back to the workbook.

PROMPT

Using the cost and return estimates in this workbook, draft a business case for the investment: executive summary, cost breakdown, expected ROI with assumptions stated, key risks, and a clear recommendation.

Step 3: Stress-test the recommendation against a downside case

Copilot

ChatGPT

Claude

Ask what the case looks like if the return estimate is 20% lower than projected – a business case that only survives the optimistic scenario isn't a complete one.

Step 4: Route to whoever actually approves the investment

Word

Know the approval threshold and audience before finalizing – a case pitched at the wrong level of detail slows the decision down.

✓ Check the work

- Trace every number in the narrative back to the source workbook.
- Confirm the downside scenario was actually run, not just mentioned as a caveat.
- Check the recommendation follows logically from the data presented, not from an assumed conclusion.

Expected Outcome

A structured business case document with costs, expected returns, risks, and a clear recommendation, backed by the underlying data.



Want help rolling this out across your team? **Go to Liminals.Tech** ■