

Project Overview

Plan Name: _____

Project Title: _____

Business Case Owner: _____

Key Contributors (PI, IT, Finance): _____

Date: _____

Version: _____

Approval Routing / Governance Path: _____

One-line Project Goal Statement: _____

Executive Summary

Distill the case into two or three paragraphs using a simple Situation-Complication-Solution format. This should be the last item completed.

Project-at-a-Glance

Fill out the table to show the current state vs. the expected state for the top metrics to be assessed, the recommended action, requested approval, and the ROI. This provides stakeholders with a high-level snapshot to entice them to keep reading.

KPIs [insert top metrics]	Current State	Expected State	Recommended Action	Requested Approval	ROI
Recoveries					
Administrative costs					
Auditor productivity					
Vendor fees					

Pareo® Platform Business Case Template

Use this workbook to build an internal business case for a Pareo investment.



ROI Headline: _____

Recommended Action

Insert short statement about why decision-makers should approve Pareo.

Background and Current State

Establish why the status quo is no longer acceptable. Cite current systems, FTE counts, workarounds, and any compliance risks.

How PI Operations Are Structured Today

(e.g. vendors, internal teams, systems in use)

Age and Limitations of Existing Technology or Manual Processes

Current Staffing and Known Capacity Constraints

Key Pain Points

Include all that apply and add additional points and details as needed. Add supporting data if available. Examples follow.

Fragmented vendor management		
Manual reporting		
Cannot track audit lifecycle		
SLA misses		
Duplicate audits		
Difficult vendor performance measurement		
Barriers to insourcing		
Barriers to prepay expansion		

Problem Quantification

Pull from internal data wherever possible; otherwise, use Pareo benchmarks.

Operational Waste

(e.g., hours spent on manual report compilation, vendor coordination, invoice reconciliation)

Financial Exposure

(e.g., write-offs, duplicate audits, unrecovered overpayments)

Strategic Cost

(e.g., inability to insource, expand prepay, or demonstrate ROI)

Risks of Inaction

(e.g., compliance exposure, vendor leverage, AI readiness gap, employee retention issues)

Solution Overview

Describe Pareo and why it is being recommended for your organization.

Core Capabilities

Map these to the key pain points listed earlier.

Pareo Capabilities	Pain Points
Audit Inventory Management	
Opportunity Identification & Tracking	
Vendor Management	
Evidence Management	
Insights & Reporting	
Connectivity & Integrations	

Implementation Approach

(e.g., phased capability rollouts, non-invasive file-based integrations)

Ecosystem Context

Describe how Pareo will work alongside existing vendors and internal teams.

Options Analysis

Cost	Timeline	Risk	Capability	Scalability
Option A: Status quo Quantify the ongoing cost of doing nothing (FTE time, write-off exposure, vendor fees paid without visibility).				
Option B: Build internally Estimate the timeline (typically three to four years or more based on comparable plans), resource requirements, ongoing maintenance burden, and capability gaps vs. commercial solution.				
Option C: Pareo Include the implementation timeline, go-live capabilities, total cost of ownership.				
Option D: Other Other solution(s) under consideration.				

Recommended Solution and ROI

Every financial assumption included in the business case for Pareo should have a documented source, either internal data when available or Pareo benchmarks. [Use our interactive ROI calculator](#) to complete this section.

Benefits (Quantified)

Quantifiable Benefit	Current State	Pareo Benchmark	Projected Improvement	Estimated Annual Financial Impact
Inventory management time		55% reduction		
Duplicate vendor audits		90% reduction		
Claims write-offs		75% reduction		
Vendor coordination time		55% reduction		
Report compilation time		80% reduction		
Estimated annual reporting time		\$115K annual savings (mid-size plan)		
Vendor data feed costs		\$100K+ per feed eliminated		
IT costs		\$150K+ annual savings		
Clinical review/auditor staffing		FTE productivity gains		

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Operational Benefits

Quantifiable Benefit	Current State	Pareo Benchmark	Projected Improvement	Estimated Annual Financial Impact
Reporting frequency		Real-time reporting vs. quarterly manual reporting		
Auditor throughput		30% increase		
Clinical review throughput		30% increase		
Medical record procurement		85%+ response rate within 30 days		
Compliance audit trail		100% immutable audit trail		

Cost Analysis

Cost Category	Estimated Cost	Internal Budget / Current Spend
Pareo license fee		
Implementation and onboarding		
Ongoing support and maintenance		
Internal IT resources (data feeds, integrations, testing)		
Internal project management and implementation resources		
Other implementation costs		
Total 3-Year Cost of Ownership (TCO)		

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Three-Year ROI Summary

ROI Metric	Year 1	Year 2	Year 3	Notes / Assumptions
Projected Benefits				
Projected Costs				
Payback Period				
Net Present Value (NPV) or Internal Rate of Return (IRR)				Use the metric preferred by your finance team.

Strategic Alignment

Show how the proposed investment aligns with organizational plans. This helps position the platform as enterprise infrastructure that enables long-term operational improvement, not just another software purchase.

Cost Category	Estimated Cost	Internal Budget / Current Spend
PI vendor spend		
AI readiness		
Insourcing strategy		
Prepay expansion		
Member growth		
Provider relations		
Operational efficiency		
Workforce capacity		

PI Program Annual Targets	Current Target / KPI	How Pareo Supports These Targets
Admin cost savings		
Recovery savings		
Prepay savings		

Risks and Mitigations

Outline the risks during implementation and tactics for addressing them.

Risk	Likelihood	Impact	Mitigation
Implementation timeline disrupts active audit production			
IT resource availability for data feed setup			
Vendor relationship changes during transition			
Staff change management and adoption			
Budget cycle timing			
Risk of not proceeding (compliance exposure, aging systems, AI readiness gap, competitive positioning)			

Implementation Plan

Estimate the timeline for each phase, define key milestones and decision gates, name internal resource requirements, and outline where Pareo can provide support. Finally, anticipate potential components that may be out of scope or need to be pushed into a second implementation stage.

Implementation Phase / Activity	Estimated Timeline	Key Milestones / Decision Gates	Internal Resources by Function	Pareo Support
Discovery and scoping				
Data integration				
Configuration				
User acceptance testing (UAT)				
Go-live				
Expansion				

Potential Phase Two/Out-of-Scope Components

Governance and Monitoring

Outline who will be responsible for overseeing implementation.

Executive Sponsor: _____

Steering Committee Members: _____

Project Manager: _____

ClarisHealth Implementation Lead: _____

Suggested Reporting Cadence During Implementation

Post Go-Live KPI Tracking Plan

KPI	Owner	Metric	Frequency

Approvals and Next Steps

Stakeholders should sign off with approval for the project. Include descriptions of their areas of accountability.

PI

Area(s) of accountability

Signature _____ Date _____

IT

Area(s) of accountability:

Signature _____ Date _____

Finance

Area(s) of accountability

Signature _____ Date _____

Executive Sponsor

Area(s) of accountability

Signature _____ Date _____

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Immediate Next Steps

(e.g., kick off technical scoping, engage IT on data feed requirements)

Contracting Timeline Considerations

(e.g., budget cycle alignment)

Appendix

Attach or link to supporting documents as applicable.

Examples:

Detailed ROI model

Vendor evaluation scorecard(s)

Security and compliance documentation (HITRUST, SOC II Type 2, HIPAA)

Client references

Social proof