

Return on Investment (ROI) Analysis Document

1. Executive Summary

This ROI analysis evaluates the financial return of [Project/Initiative Name]. The purpose is to assist stakeholders in making an informed decision based on projected costs, anticipated benefits, and calculated return on investment.

2. Project Overview

Project Name: [Enter Project Name]

Prepared by: [Preparer Name]

Date: [DD/MM/YYYY]

Description: [Brief project summary]

3. Cost Analysis

| Cost Item | Description | Amount (\$) |
|--------------------|-----------------------------|----------------|
| Initial Investment | Hardware, software, setup | [Enter Amount] |
| Ongoing Costs | Maintenance, support | [Enter Amount] |
| Training | Staff training expenses | [Enter Amount] |
| Other | Miscellaneous project costs | [Enter Amount] |
| Total Costs | | [Total] |

4. Benefit Analysis

| Benefit Item | Description | Estimated Value (\$) |
|--------------------|------------------------------------|----------------------|
| Cost Savings | Reduction in operational expenses | [Enter Value] |
| Revenue Increase | Additional income from project | [Enter Value] |
| Productivity Gains | Labor/time efficiency | [Enter Value] |
| Other Benefits | Intangible or qualitative benefits | [Enter Value] |
| Total Benefits | | [Total] |

5. ROI Calculation

ROI Formula:

ROI = (Total Benefits – Total Costs) / Total Costs × 100%

Total Costs: [Enter Value]

Total Benefits: [Enter Value]

Calculated ROI: [Enter ROI %]

6. Conclusions & Recommendations

[Summarize the findings, provide recommendation, and suggest next steps based on ROI analysis.]

Important Notes

- ROI analysis is based on estimated costs and benefits which may change over time.
- Intangible benefits and risks should be carefully considered alongside quantitative results.
- Review and update ROI calculations periodically as project progresses.
- Use realistic and justified assumptions for all financial projections.