



# Introduction & Instructions

## Purpose of this Template

This template is designed to help you make a compelling business case for investing in well-being initiatives. By clearly outlining the current state, financial implications, and expected impact, this template allows you to communicate the value and necessity of your initiative to key stakeholders.

## How to Use This Template

- **Fill in Each Section:** Provide relevant information in each section, using the brief prompts to guide your input.
- **Be Concise and Clear:** Use clear and concise language to communicate key points effectively.
- **Support with Data:** Wherever possible, include data or statistics to strengthen your case.
- **Visualize Key Metrics:** Use the graphs and charts provided to visually represent important data.
- **Tailor to Your Audience:** Adjust the language and focus areas to align with your audience's priorities and concerns.

## Included in This Document

- **Business Case Template:** A structured outline to help you present your case clearly and persuasively.
- **Example:** A completed version to serve as a reference and inspiration.

## Tips for Success

- **Be Strategic:** Link your initiative to organizational goals or challenges.
- **Be Realistic:** Provide achievable projections and outcomes.
- **Be Persuasive:** Emphasize the ethical and financial benefits of your initiative.

This template and example are designed to **save you time** and **increase the impact** of your business case. Fill out each section thoughtfully, and adapt the content to best resonate with your audience.

Good luck with your initiative!



Logo  
Here

## Title of Initiative Here

**Business Name:** (Name of your organization or department.

**Location:** Main location or area impacted.

**Other Info:** Relevant background (e.g., industry, audience).



### Current State

- Describe the main problem or challenge.
- Include key statistics to show impact.
- Briefly mention how it affects the organization.



### Turnover & Burnout Data

- Provide turnover and burnout rates.
- Include key statistics or benchmarks.

*\*Feel free to utilize our curated articles to find helpful data.*



### Financial Implications

- Estimate financial impact (e.g., turnover costs, lost productivity).
- Include potential revenue losses.



### Mission & Purpose

- State the initiative's main goal.
- Connect to organizational priorities.



### Investment

- Describe expected outcomes (e.g., cost savings, productivity gains).
- Include any projected ROI.

- *Use this space for any visuals or graphics to show key metrics or impacts.*
- *Include brief captions for context.*

# Cultivating Happiness in Medicine & Wellness in Nursing

## Going All-In to Improve the Clinician Experience



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### Current State

#### Health care is hard.

At a time when the country is still reeling from the effect of the pandemic. Clinicians are tired, tired of working long hours with staffing shortages, tired of patients belittling or even attacking them over government mandates they can't control, and tired of missing their children's t-ball games and dance recitals.



### Financial Implications

Revenue generation is **almost non-existent**. Cuts are being made in every possible area. The idea of building and supporting innovative programs to support the health and well-being of our care givers is a distant mirage in most health care organizations. At Banner we are so lucky for all the people who have gotten us to where we are. Without your support in the past, we wouldn't even be here today.



### Turnover & Burnout Data

**75-80%** of clinicians feel burned out

**20%** of physicians are planning to leave in 2 years

**40%** of nurses plan to leave by 2023



### Mission & Purpose

To tackle this challenge at Banner, we have implemented CHIM & WIN, and thus far, over **20,000** clinicians have been impacted by activities like leadership development, social community, peer coaches, local champions, and respite rooms.



### Impact

Our work has captured national attention:

- **other orgs** have met with us to learn from us
- we've been **featured** on the national stage
- we have **innovative partnerships** with companies like *Johnson & Johnson*, *Studio Elsewhere*, and *JP Morgan Chase*

#### Our work is not done yet!

- Burnout costs the United States \$15 Billion annually
- 80% of physicians and 75% of nurses say they feel burned out
- the predicted shortage of 1.1 million nurses by 2023 and 139,000 physicians in the next 10 yrs



### Investment

Your funding has directly supported the actions that led to these phenomenal results

- ➔ **>10,000** providers are impacted by CHIM
- ➔ **>10,500** bedside RNs are impacted by WIN
- ➔ **50%-100%** participation in social community
- ➔ **639** leaders in leadership development

**\$8.8M** saved in potential revenue generation

**IT ISN'T ENOUGH FOR OUR CLINICIANS TO JUST SURVIVE, THEY MUST THRIVE.**