# HEADCOUNT REQUEST

*Build the business case for a role. Use measured (M) or estimated (E) figures, and note assumptions where helpful.*

| | | |
|---|---|---|
| Role title / level: _____ | Department: _____ | Hiring manager: _____ |
| Reports to: _____ | Target start date: _____ | Type: ☐ New ☐ Backfill ☐ Contractor conversion |

**1. THE REQUEST**

Approval requested for one _____ in _____. Target start date: _____.

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**2. THE BUSINESS NEED**

*What is not getting done, taking too long, or not being done well today? Describe the business problem and include 2–3 relevant measures (M/E).*

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**3. EXPECTED BUSINESS IMPACT**

*What should improve when this role is filled and fully ramped? Select the outcomes that matter and add a measure or example.*

| Capacity & workload | Delivery & performance | Customers, revenue & risk |
|---|---|---|
| ☐ Reduce overtime or backlog | ☐ Improve response or cycle time | ☐ Improve customer experience |
| ☐ Rebalance team workload | ☐ Reduce project delays | ☐ Support revenue opportunities |
| ☐ Free time for higher-value work | ☐ Increase output or coverage | ☐ Reduce operational/compliance risk |

Expected improvement / evidence of success: _____

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**4. WHAT FINANCE NEEDS TO SEE**

*Use estimates where exact figures are not available. The goal is a realistic cost and impact picture, not a guaranteed return.*

| | |
|---|---|
| **FULLY LOADED COST** | Salary / incentives: $_____ Benefits & payroll taxes: $_____<br>Equipment, software, workspace: $_____ Recruiting & onboarding: $_____<br>Estimated year-one total: $_____ Ongoing annual cost: $_____ |
| **TIME TO PRODUCTIVITY** | Estimated time to hire: _____ days Training / ramp period: _____ months<br>What support, training, or milestones are needed before the role is fully productive?<br>_____ |
| **BUSINESS IMPACT** | What measurable change do you expect? (e.g., capacity, overtime, backlog, delivery time, customer response, retention, revenue support, or risk exposure)<br>Measure / baseline: _____ Expected change: _____ |

**5. CURRENT WORKLOAD AND VACANCY IMPACT**

*How is the work being handled today, and what is the impact of leaving the role unfilled?*

_____

*Current workload / capacity pressure:*

_____

*Impact of vacancy (e.g., overtime, temporary support, delayed work, missed opportunities, service or risk concerns):*

_____

## 6. ALTERNATIVES CONSIDERED

*Compare realistic options, including the cost, trade-offs, and likely effect on the business.*

| Option | Estimated cost | Potential benefit | Trade-off / limitation |
|---|---|---|---|
| Hire full-time | $_____ | _____ | _____ |
| Contract / temporary support | $_____ | _____ | _____ |

*Other options considered (redistribute work, automate, defer, internal move):* _____

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## 7. RISKS AND REVIEW POINT

*What assumptions or factors could affect the need or expected impact? What should be reviewed, and when?*
*Key risk / assumption:*

_____

*Review date or checkpoint:* _____

*Success measure to review:*

_____

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## 8. RECOMMENDATION

*Why is this the right role and the right approach for the business now?*

_____

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## APPROVALS

Manager: _____ Date: _____

Finance: _____ Date: _____

HR: _____ Date: _____

*Tip: Keep the case specific to the role. Use the measures that best demonstrate the need; not every role will have a direct revenue or dollar-for-dollar return.*