

Case Study 2: Digital Transformation

1. Executive Summary

This technical report analyzes the digital transformation of a professional services firm, moving from manual, siloed systems to a centralized, cloud-based CRM. Adhering to ISO 21502 standards, the project focused on institutional scalability and data transparency (ISO, 2020).

2. Governance Architecture

The governance model utilized the 'Integration' performance domain. The core strategy involved linking technical milestones with user adoption KPIs. This ensured the transformation was governed by tangible utility, rather than a purely technical deployment. The governance structure aimed to foster organizational data health through clear accountability protocols.

3. Constraint & Risk Analysis

The project was governed under: *Data Security/GDPR*, *System Migration Windows*, and *Change Management requirements*. The most significant risk was 'System Rejection.' Risk assessment models indicated that if the CRM interface complexity exceeded user capability, the staff would revert to manual silos, rendering the technical investment useless (Kotter, 2012).

4. Methodological Application

Governance was operationalized through a multi-tiered *Communication Plan*. By differentiating technical and non-technical stakeholders, we reduced resistance. Change management milestones—specifically user-training certifications—were governed with the same severity as technical deployment milestones, ensuring a balanced transformation approach.

5. Performance Metrics

Metric	Baseline	Post-Project	Variance	Strategic Impact
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System Uptime	92%	99.9%	+7.9%	Significant
User Adoption	40%	85%	+45%	Critical
Data Latency	24h	<1h	-95%	Significant

6. Critical Reflection & References

The technical deployment was efficient, but the project highlighted the lag between 'Technical Readiness' and 'Cultural Readiness.' Future projects must integrate change management as a critical path dependency. **References:** ISO. (2020). *ISO 21502:2020 Project Management*. Kotter, J. P. (2012). *Leading Change*.