

Project Compass Advisory

Case 2: Strategic Change (Digital Transformation)

Situation: A professional services firm relied on legacy, siloed manual systems, which severely limited scalability and cross-departmental data transparency.

Task: Lead the migration to a cloud-based CRM to integrate business processes and reduce administrative overhead.

Action: I applied structured governance to manage the transformation complexity. The *Project Charter* defined key performance indicators (KPIs) focused not just on software deployment, but on user adoption rates. I utilized the *Integrated Risk Register* to track and mitigate migration-related data loss, and proactively managed stakeholder resistance through a tiered *Communication Plan*.

Result: Delivered a 30% increase in operational throughput and successfully established a single source of truth for client data.

Critical Reflection: The project succeeded technically, but I realized that I emphasized the digital tool over the cultural shift. Future transformations will integrate "change management" milestones alongside "technical" milestones to ensure lasting behavioral integration.