

Coming to the Rescue

A leading UK charity initiated a project to deliver a replacement Case Management System (CMS). The new system would be delivered using a configuration of Microsoft Dynamics CRM 2011, with extensions to manage data integration with referring partners. A traditional consulting firm was selected as the preferred supplier who would be responsible for the success of the overall programme design, configuration and implementation, supported by a specialist sub-contractor.

Challenges

The client faced a number of challenges in managing the deployment of the CMS and transitioning to its new operating model:

- The implementation process was taking far longer than originally envisaged
- Deployment of the new CMS solution in the first two pilot regions caused severe business disruption
- A number of significant errors and issues associated with the solution were identified
- Continued delays to the resolution of these issues had impacted the confidence of senior executives and key stakeholders

pmX Proposition and Solution

pmX professionals conducted an independent review to assist the senior executives with the identification of remediation plans. These plans were based on:

- Reviewing the project status using the pmX Diagnostic to understand areas of concern, gain a broader appreciation of the project's current strengths, weaknesses and approach
- Providing practical recommendations for the next steps and developing a clear roadmap for implementing the recommendations

Impact

The benefits to the client from working with pmX included:

- The key project issues that were causing the delays and difficulties were clearly identified
- Practical recommendations were provided to help the client meet the next key milestone
- A much stronger and more robust project management structure was adopted to ensure that any future difficulties could be identified and addressed in a timely manner
- The original implementation team were able to complete their assignment without further disruption to the business

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