Project Case Study

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Strategic Procurement Transformation Initiative

WHAT

Strategic Objective: Digitize and automate end-to-end procurement workflows

Client Profile: Enterprise segment with multi-layered approval processes

Scope: 8–10 high-volume manual forms with iterative internal reviews

HOW

Technology Stack: Microsoft Power Platform (Power Apps, Automate, Dataverse)

Delivery Team: Globally distributed, remote execution model

Timeline: 16 weeks delivery + 2 weeks hypercare

Commercials:

- **Revenue**: $150K
- **Cost**: $75K
- **Project Margin**: 50%

VALUE

Client Benefits - Increased operational efficiency, Reduced turnaround time, Enhanced transparency for senior leadership

Consulting Value - High-impact delivery = opportunity for future up-sell and cross-sell

Client Kickoff Meeting Strategy

Purpose of the Meeting

- Align vision, scope, and delivery model
- Establish trust and rapport
- Set expectations for communication, governance, and success

Pre-Meeting Preparation

- Review contract, scope, and stakeholders
- Understand client org chart and decision-makers
- Prepare: draft charter, RACI, delivery roadmap, and SharePoint/Teams

Kickoff Agenda Highlights

- Introductions & roles
- Project overview & strategic importance
- Delivery plan & methodology
- Roles, responsibilities & escalation
- Communication & cadence
- Key milestones & invoicing
- Open discussion

Post-Meeting Actions

- Distribute Minutes of Meeting (MOM)
- Confirm decisions and next steps
- Launch collaboration workspace
- Send invites for regular status reviews
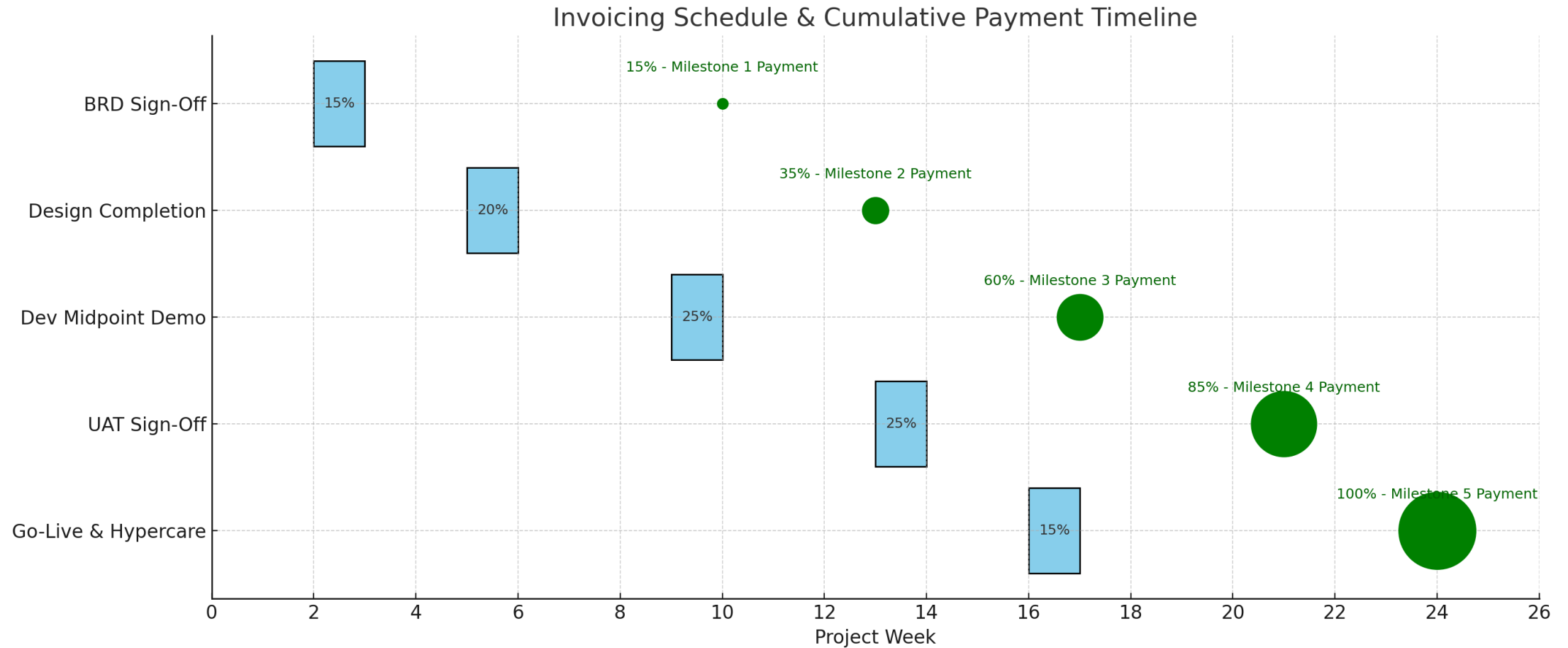
Strategy to Win Customer Confidence Early

Deliver Quick Wins	Identify 1–2 high-impact forms or workflows to complete in first 2–3 weeks
	Use working demos to show tangible progress early
	Prioritize areas with visible bottlenecks or user pain
Proactive & Transparent Communication	Set a cadence of weekly status reports and bi-weekly demos
	Share progress dashboards with delivery %, risks, and invoices
	Keep stakeholders looped in, even on delays — show control
Establish a Partnership Mindset	Position the project as "our" success, not just delivery
	Use discovery conversations to understand their "why" — not just "what"
	Anticipate questions, offer solutions proactively
Put the Right Faces Forward	Assign a dedicated SPOC to the client for consistency
	Bring in SMEs for specific sessions (e.g., Power Platform expert)
	Let leadership meet your delivery lead early to show commitment

Project Health & Financial Reporting to Senior Management

Project Health Overview	
	Scope – % completed vs baseline
	Schedule – On time / delayed milestones
	Progress – Sprint/phase completion %, burn-down chart
	Risks & Issues – Open vs resolved, high severity flags

Invoicing Status	
	Milestones Delivered – vs expected
	Invoices Raised – Amount & date
	Payments Received – With expected vs actual delays
	Overdue Invoices – Highlighted (if any)

Profitability Snapshot	
	Revenue Recognized (to date)
	Cost Incurred – Internal burn reports
	Profit Margin – % actual vs planned
	Resource Utilization – Billable vs non-billable hours

Project Audit: Key Challenges Identified

Project Delays

- Client introduced critical new requirements
- Existing BRDs on hold pending updates
- Currently 2 weeks behind schedule due to integration issues

Budget Overruns

- 10% overrun reported in first few weeks
- Main cause: Extended hours for resolving integration complexities

Quality Concerns

- Early testing indicates performance issues
- Risks missing client's high-performance benchmarks

Communication Gaps

- Inconsistent updates between teams
- Resulting in duplicate efforts and unclear ownership

Strategy to address challenges

Bringing the Project Back on Track

- Split BRDs into Phase 1 (signed-off items) and Phase 2 (new requirements)
- Use agile sprints to fast-track critical forms and workflows
- Parallelize development and testing efforts where possible
- Add buffer to the new timeline to manage complexity and uncertainty
- Set up sprint-level tracking with burn-down charts

Budget Realignment Without Scope Compromise

- Raise formal change request for newly introduced requirements
- Reassign tasks to best-fit resources to increase efficiency
- Reduce non-billable overheads: fewer meetings, focused reviews
- Track time and effort using time-sheet tools to control burn
- Work with finance to forecast cash flow and margin realization

Quality Assurance Strategy

- Involve QA from sprint 1 (shift-left approach)
- Set performance benchmarks early, align with client standards
- Conduct peer reviews before code merges
- Implement automated regression testing for repeatable validations
- Include UAT checkpoints and performance testing in each sprint

Communication and Documentation Improvements

- Daily standups to align cross-location teams
- Weekly stakeholder updates and steering committee reviews
- Centralize documentation in SharePoint with version control
- Define and implement a RACI matrix
- Use Teams/Planner for real-time visibility and ownership