Project Phoenix – Internal Strategy & Planning Document

This document outlines the proposed strategy, scope, risks, and operational plan for Project Phoenix, a multi-quarter digital transformation initiative aimed at modernizing the company's internal analytics and reporting infrastructure.

The primary objective of Project Phoenix is to replace legacy reporting systems with a unified, cloud-based analytics platform that can support real-time decision-making. The leadership team has emphasized that the new system must integrate with existing ERP and CRM platforms without disrupting current business operations.

During the initial planning meeting held in January, the executive committee approved a preliminary budget of $1.2 million, subject to further review by the finance department. While the budget approval is provisional, procurement activities are expected to begin by mid-March if no major objections are raised.

The engineering team is responsible for evaluating suitable cloud vendors. Although AWS and Azure were mentioned as preferred options, no final decision has been made. The team must also assess data migration risks, especially concerning historical financial records that span more than ten years.

A cross-functional task force involving engineering, finance, legal, and compliance teams will be formed to oversee implementation. However, the document does not clearly specify who will lead this task force or how escalation decisions will be handled.

One of the major concerns raised during discussions was regulatory compliance. Since the analytics platform will process sensitive customer data, the legal team must confirm adherence to data protection laws across multiple regions. At the time of writing, no formal compliance audit has been scheduled.

The tentative timeline proposes completing vendor selection by the end of Q1, system design by mid-Q2, and full deployment by Q4. These milestones assume uninterrupted vendor availability and timely approvals, which may not hold true in practice.

The leadership team expects weekly progress reports once development begins. Responsibility for preparing these reports has not been assigned. Additionally, there is an assumption that existing staff can handle the transition without external consultants, although no capacity analysis has been conducted.

In summary, Project Phoenix presents a significant opportunity to modernize analytics capabilities, but it carries dependencies on vendor decisions, regulatory clearance, and cross-team coordination that remain unresolved.