



CASE STUDY

Financial Services Firm

IT Project and Leadership Issues



CHALLENGE

The company embarked on an initiative to modernize their client-facing app to provide better account management and transaction capabilities. However, the project was suffering from constant scope creep due to unclear project objectives and frequent leadership-driven changes. The IT team was overwhelmed with shifting priorities, and leadership lacked the technical understanding needed to provide strategic direction, leading to delays and friction between departments.

SOLUTION

Immediately worked with leadership to solidify the project's scope and created a clear roadmap with phased deliverables. I instituted a formal change management process to prevent arbitrary changes from derailing progress. To improve leadership's engagement and decision-making, Facilitated educational sessions to help them better understand the technical aspects of the project. Conducted regular check-ins with stakeholders and implemented Agile practices, breaking the project into manageable sprints.

BENEFITS

The clear roadmap and change control process stabilized the project, reducing scope creep by 40%. Leadership became more informed and decisive, allowing the project to progress efficiently. The app was successfully launched within six months, improving client satisfaction by 25% due to enhanced functionality and ease of use. The IT department, relieved from constant rework, reported a 30% improvement in productivity for future projects.

ABOUT CLARITYBOLD

ClarityBold specializes in delivering comprehensive project management assessments and providing fractional project management leadership. We help businesses optimize their project operations and ensure successful outcomes through expert evaluations and strategic support.

AT A GLANCE

CHALLENGES

- Leadership conflicts
- Operational planning
- Unclear project priorities
- Lack of cross team direction

BENEFITS

- Reduce scope creep by 40%
- Improving client satisfaction by 25%
- 30% improvement in productivity for future projects.