

CASE STUDY



PROJECT HEALTH CHECK

Uncovering the true state of play and what's needed for success



BACKGROUND

A social services organisation was partway through a major transformation programme implementing Microsoft Dynamics involving multiple suppliers and internal teams, working towards a committed go-live date.

The programme underpinned key business functions across finance, operations, marketing, and customer engagement, making it central to how teams would operate day to day.

Alongside delivery, there was a growing need to understand whether the solution would fully support these areas in practice. Not just in principle, but in a way that could be adopted consistently across teams, deliver the expected value, and replace existing legacy platforms without introducing additional complexity.

As the programme progressed, key dates for user acceptance testing and data migration had been established and committed.

As those dates approached, successive demonstrations, rather than increasing confidence in the solution, were beginning to raise questions around what would be delivered and whether it would meet expectations.

KEY CONSIDERATIONS

- Inconsistent View of Delivery
- Mismatched Expectations
- Documentation and Scope Ambiguity
- Uncertainty on Capability Requirements
- Inconsistent Governance

OUR VISION

- Establish a Reliable Baseline
- Achieve Alignment
- Provide a Practical Mechanism for Progress
- Determine Readiness

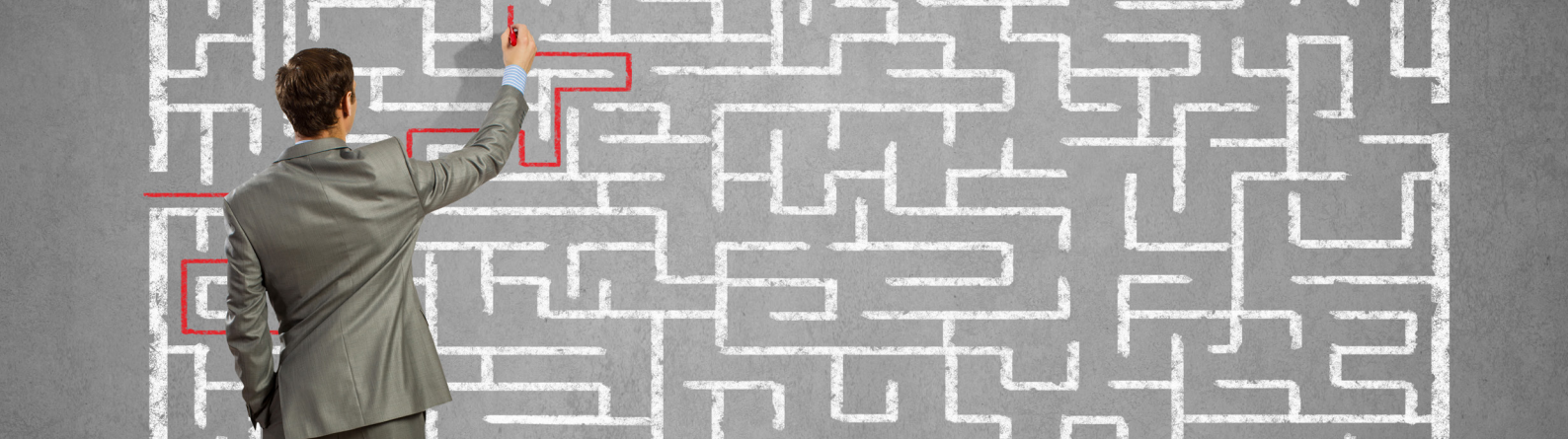
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Arqvera was engaged to provide an independent assessment of current delivery status and readiness to enter the critical testing phases and preparations for go-live.

At this stage:

- ◇ Testing and demonstrations were highlighting differences between expected and delivered behavior.
- ◇ Some capabilities required additional configuration or licensing that had not been fully understood earlier in the programme.
- ◇ Documentation included areas that remained open or subject to interpretation.
- ◇ Earlier analysis existed, but its relationship to the current design baseline was not always clear.
- ◇ Scope discussions and change requests continued alongside delivery.
- ◇ Changes in resourcing over time meant that some decisions and assumptions were not consistently captured.

As a result, confidence in what had been delivered, and what was required to proceed, was not consistent across stakeholders.

THE CHALLENGE

The challenge was not a single issue, but the absence of a consistent and trusted view of delivery across the programme.

Over time, documentation had grown across contracts, specifications, and working artefacts, each carrying part of the picture but not always aligning. It was not always clear which documents were authoritative, whether newer ones replaced earlier versions, or how requirements translated into what was actually being built.

How functionality was described added to the difficulty. Descriptions did not consistently distinguish between what would be available as standard, what required configuration, and what depended on further development. As a result, expectations were often based on interpretation and assumption, rather than confirmation.

Testing and demonstrations, intended to validate delivery, frequently surfaced new questions instead. In some cases, clarifying expected behavior led to formal change discussions, even where functionality had been assumed to be included. Planning for testing was therefore challenging without a stable design baseline.

At the same time, delivery continued to evolve. Some functionality arrived



WHY IS THIS NEEDED?

Status reports are a lagging indicator of past activity. Arqvera's project health check is a leading indicator of future success.



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late in the cycle, making it harder to assess suitability and increasing risk to delivery timelines. Changes in delivery teams over time meant that decisions and assumptions were not always consistently captured or carried forward.

Taken together, this created a situation where progress had been made, but it was increasingly difficult for any party to confidently describe what had been delivered, what remained in scope, and what would be ready in time for go-live.

“Are we ready to proceed?”

This made it difficult to answer a simple question with confidence; “Are we ready to proceed?”

Approach

Arqvera, was engaged to provide a focused project health check and readiness review, not to take over delivery.

The approach was structured and deliberately neutral, designed to support alignment across all parties and progress delivery without reinterpreting prior decisions or introducing new scope.

Given the volume of documentation, combined with time pressure and information spread across multiple sources, establishing a consistent view manually would have required significant time and repeated review cycles.

Using an AI-powered, 15-domain diagnostic tool with over 400 data points, analysis supported our review, reducing the time required to examine and reconcile multiple sources, while ensuring that interpretation and judgment remained human-led. This enabled a clear, evidence-based position to be established without pausing or resetting the programme, allowing facts to be surfaced and understood before more disruptive decisions may be required.

The work centred on five areas:

1. Document and scope alignment: Reviewed contractual and delivery artefacts to establish what was defined, how scope was represented across documents, and where alignment or interpretation was required.

2. Delivery and responsibility mapping: Clarified what had been delivered, what remained, and how responsibilities were understood across suppliers and internal teams, including ownership of key activities and dependencies.

WHAT IS THE VALUE?

- Moves to outcomes not technical detail
- Build confidence and commitment
- Eliminates optimism bias and ‘super status green’ reporting
- Checks whether the project is solving the right problem.
- Validates scope, governance, sponsorship, and dependencies.
- Highlights weak decision-making and unclear ownership.
- Checks whether suppliers and partners are fit for purpose.
- Tests whether benefits are still realistic.
- Surfaces issues seeded upstream before build begins.
- Early intervention is far cheaper than late recovery.
- Mitigating the “Death by \$1M” Factor (failure rate for projects with budgets over \$1M is 50% higher than smaller projects.)
- Gives leaders an independent view of delivery health.
- Creates permission to raise uncomfortable truths.
- Helps sponsors decide whether to continue, intervene, or stop.
- Protects value, trust, and execution confidence.
- Moves from retrospective to prospective positions.

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3. Commercial position and risk awareness: Provided a clear view of where costs, change requests, and additional licensing or platform extensions could arise, and how these related to expectations of what was considered in scope.

4. Readiness across testing, data, and rollout: Brought together planning and assumptions across testing, user readiness, data migration, and rollout activities to show how they connected, and where further clarity was needed.

5. Structured clarification, action planning, and governance support: Produced a non-judgmental, structured set of questions and actions designed to:

- ◇ confirm what had been delivered
- ◇ clarify what remained
- ◇ align expectations across all parties before progressing

Each item was supported by:

- ◇ defined ownership
- ◇ required evidence
- ◇ a suggested timeline aligned to the delivery plan
- ◇ an explanation of why the item mattered
- ◇ the potential risk or impact if not addressed

This created a clear, prioritised plan for progressing outstanding areas, providing a practical mechanism for decision-making, escalation, and maintaining momentum towards UAT, data migration and go-live.

Deliverables

The project health check produced a structured set of outcomes designed to establish a reliable baseline for the board and provide a practical mechanism for progressing delivery:

Programme status and readiness assessment: A consolidated view of delivered capability, outstanding work, and dependencies required for UAT and go-live, grounded in available artefacts and evidence.

Clarification and evidence framework: A structured set of questions, aligned to specific programme areas, enabling suppliers and stakeholders to respond clearly and consistently without rework or ambiguity.

Prioritised action and response plan: A sequenced set of actions with defined ownership, timelines, and expected outcomes, aligned to the existing delivery plan and highlighting where delays would introduce risk.

Risk and dependency mapping: Identification of key delivery, commercial,

WHO IS THIS FOR?

The Project Health check is designed for organizations navigating high-stakes change where the cost of failure is significant, but the path forward is currently obscured by complexity or poor reporting. It is specifically built for:

- Organisations executing a transformation roadmap
- Businesses implementing new software, operating model, or service change
- Leadership teams who need an independent pragmatic view on whether their project will deliver and if not what to do about it.
- Programmes with high ambiguity, stakeholder tension, or delivery risk
- Sponsors who want decision-ready recommendations grounded in stakeholder evidence

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and operational risks, including where assumptions, licensing, or scope interpretation could impact timelines or cost.

Go-live readiness view: A practical assessment of readiness across testing, data migration, user support, and rollout, bringing together previously disconnected activities into a single view.

Governance and decision support guidance: Recommendations to support clearer escalation, decision-making, and communication, enabling the programme to move forward with defined ownership and accountability.

Outcome

The engagement established a clear, evidence-based view backed by quantified data of where the programme stood, at a point where time, capacity, and delivery pressure were increasing.

It also surfaced areas that had not yet been fully understood, bringing previously unseen dependencies, assumptions, and risks into view before they could impact delivery.

This enabled the team to move from reacting to individual issues towards managing the programme in a more structured and deliberate way, helping them:

- ◇ approach emerging gaps, particularly around data and testing, with greater structure and confidence
- ◇ establish a clearer commercial position, including what could reasonably be expected within scope and where additional cost or change might arise
- ◇ engage suppliers with clearer, evidence-based discussions grounded in what could be demonstrated rather than assumed
- ◇ prioritise actions and decisions within the constraints of limited time and internal capacity, aligned to the existing delivery plan

The outcome also supported ongoing risk management by making dependencies, assumptions, and potential impacts explicit, allowing risks to be actively managed rather than emerging late in delivery.

In parallel, the work helped both internal teams and suppliers better understand where gaps remained, not only in delivery, but in expectations, providing a more stable basis for progressing into testing and go-live.

The review and follow-on discussions provided a consistent reference point for decision-making, supporting the development of a revised approach and next steps as the programme evolved.



Most major projects don't fail during delivery; they fail because of the things we're pretending to know during planning. Arqvera's Project health-check is an AI-enhanced, evidence-led diagnostic supported by 100 years of collective experience designed for sponsors who suspect their 'Green' status reports are hiding 'Red' reality. By combining a 15 domain, 400-point comprehensive health check with rapid stakeholder synthesis, we cut through internal bias to answer three uncomfortable questions:

- what do we actually know,
- what are we pretending to know, and,
- what must we do next to avoid a costly surprise?

We don't just provide a list of risks; we provide a quantified remediation plan that protects your ROI, restores stakeholder confidence, and turns delivery uncertainty into structured decision-making.



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