



CASE STUDY:

STRUCTURE BEHIND THE STRATEGY: PROJECT MANAGING A CROSS- FUNCTIONAL SYSTEMS & HR MODERNIZATION INITIATIVE

How we built the scope, coordination, and structure that kept a multi-consultant systems and HR modernization project on track — and delivered it ahead of schedule.

TABLE OF CONTENTS

TABLE OF CONTENTS

OVERVIEW	2
CHALLENGES	3
OUR APPROACH	5
SOLUTIONS	6
RESULTS	8
SIGNIFICANCE	10
CLIENT EXPERIENCE	11

OVERVIEW

A mission-driven health and community organization engaged a specialist consulting team to modernize its internal HR systems and technology infrastructure — migrating from a fragmented, historical document environment to a structured, active system, alongside a full HR operations and onboarding overhaul. HITM was engaged as the project management partner, building the proposal and scope, shaping the systems architecture alongside the specialist team, and adaptively coordinating the cross-functional consultant team from kickoff through delivery.



BACKGROUND

Organization Type: Health & community-focused nonprofit

Role: Project Manager & Adaptive Systems Strategist

Scope: Proposal development, project scope and timeline design, systems architecture strategy, cross-functional coordination, adaptive risk response, and archiving structure

Team Coordinated: Lead HR Consultant plus HR consulting team

Timeline: 5-month, two-phase engagement

Delivered: 2 weeks ahead of schedule

CHALLENGES

When this organization brought in a specialist consultant team to modernize its HR systems and technology infrastructure, the engagement had energy and expertise — but no scope, no shared tracking system, and no one holding the various workstreams together. The gap wasn't specialist knowledge; it was the project management structure needed to turn expert recommendations into a coordinated, on-time delivery.

CHALLENGE #1:

No Defined Scope or Proposal

The engagement began with strong specialist expertise but no proposal, defined phases, or timeline — work couldn't responsibly begin without structure first.

CHALLENGE #2:

Underused, Costly Systems

Existing HR and technology systems were only partially adopted across the organization, driving added cost and leaving fully operational resources underused.

CHALLENGE #3:

Workstreams at Risk of Falling Out of Sync

Multiple specialist-led workstreams — HR audit, systems recommendations, and staff rollout — ran in parallel with no shared tracking system, and no one catching stalls (missed deliverables, access breakdowns) before they became delays.

CHALLENGES

CHALLENGE #4:

No Clear Archiving Structure

Years of historical files lived across a legacy platform with no naming conventions or clear distinction between historical records and active, ongoing use.

CHALLENGE #5:

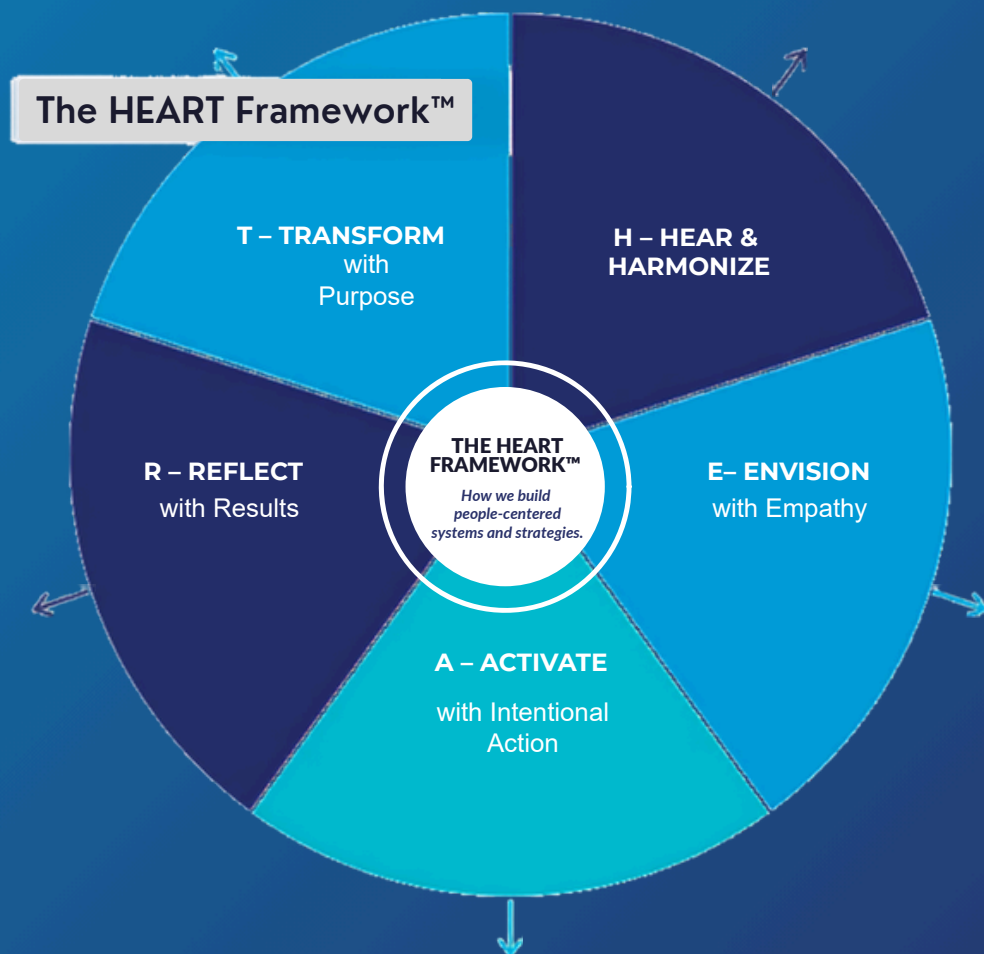
Risk Points Needing a Proactive Plan

Specialist findings surfaced real risk points along the way — without a plan to get ahead of them, any one could have derailed the project's timeline.

OUR APPROACH

We approached this work through our HEART Framework™ — hearing where the timelines, tools, and communication needed structure, envisioning a clear cross-functional path from proposal to go-live, activating that vision by building the scope, trackers, and system architecture the team needed, reflecting through ongoing review as friction surfaced, and transforming a multi-consultant effort into a system with lasting clarity.

When workstreams stalled or friction surfaced — a missed deliverable, an access breakdown, an unresolved design question — we adjusted the approach and tried multiple remedies until the project stayed on track, not just tracked the problem.



SOLUTIONS

We built the structure underneath the expertise — and adapted it in real time. That meant writing the proposal and scope, building the tracking systems to manage the work, shaping systems architecture alongside the specialist team, designing a lasting archiving structure, and adjusting course whenever friction threatened to stall the project.

SOLUTION #1:

Proposal & Scope Architecture

Wrote the full project proposal and defined the phases, deliverables, and timeline that gave the engagement its structure from day one.

SOLUTION #2:

PM Infrastructure & Tracking Systems

Built the trackers, templates, and tools used to manage the project — giving the team a shared, reliable way to see progress and stay on schedule.

SOLUTION #3:

Adaptive Strategy & Systems Design

Worked directly with the specialist team through structural planning sessions — shaping the SharePoint architecture and resolving open system-design questions — while adjusting course in real time whenever a deliverable stalled or access broke down, trying multiple remedies until the project stayed on track.

SOLUTION #4:

Archiving & Naming Convention System

Designed a clear structure distinguishing historical records from active, ongoing use, with defined naming conventions so the organization's documents had lasting clarity and purpose.



SOLUTION #5:

Proactive Risk Response & Troubleshooting

Caught friction before it became delay — a missed deliverable, a stalled decision, an access breakdown — and escalated, adjusted tactics, and tried multiple remedies until each issue resolved, keeping quality and direction consistent across the team.



RESULTS

RESULTS



Weeks Ahead of Schedule



Workstreams Synced



Month Engagement



PM-Led

Consultant Team Coordinated

Key Highlights:

2 Weeks Ahead of Schedule — The project was delivered two weeks ahead of the phase deadline, giving organizational leadership confidence in the pace and clarity of the modernization work.

Adaptive Problem-Solving — When a key deliverable stalled past its deadline, flagged it immediately, escalated, and drove a structured recovery plan — the kind of real-time adjustment that kept the two-phase engagement on schedule.

HIGHLIGHTS

Key Highlights:

Cross-Functional Team Alignment — Coordinated HR audit, systems recommendations, and onboarding redesign workstreams under one timeline and communication cadence, with regular check-ins to problem-solve as issues surfaced.

Freed the Lead Consultant for Strategic Work — Handling coordination and troubleshooting allowed the lead HR consultant to focus on high-value strategic rollout conversations with staff, rather than day-to-day project management.

SIGNIFICANCE

This engagement shows what it looks like to build the structure that lets specialist expertise actually land — writing the proposal, designing the scope, shaping systems architecture alongside the specialist team, and staying at the table as thought partner and coordinator through a multi-consultant systems and HR modernization initiative. The work wasn't about the HR recommendations themselves; it was about building the project management infrastructure — and the adaptive judgment — that let those recommendations reach implementation on time and with clarity.

This is a fundamental truth of transformation work: even the best expertise needs structure to land, and structure alone isn't enough without someone adjusting course in real time. When friction surfaced — a missed deadline, an access breakdown, an open design question — the response wasn't just tracking the problem, it was trying multiple remedies until it resolved. Delivered two weeks ahead of schedule, the engagement left the organization with clear systems, an aligned team, and a sustainable path forward.

KEY TAKEAWAYS:

- Great expertise still needs structure to land — proposal, scope, and timeline are what make specialist recommendations deliverable.
- Adaptive strategy beats static tracking — when a deliverable stalled or access broke down, adjusting the approach in real time, not just logging the issue, is what kept momentum.
- Cross-functional coordination is a discipline of its own — keeping multiple workstreams synced requires dedicated project management, not just goodwill.
- Clear systems outlast the engagement — a defined archiving and naming structure gives an organization lasting clarity long after the consultants leave.
- Good PM support creates space for strategic work — when coordination is handled, specialists are freed to focus on the conversations that matter most.

CLIENT EXPERIENCE

This engagement took place over a five-month, two-phase partnership in 2025, spanning proposal development, cross-functional coordination, systems structure, and risk mitigation. All outcomes reflect the direct results of HITM's project management, coordination, and structural design during that period.

TESTIMONIAL

"Christina is a fantastic Coach, Project Manager, Facilitator, and Curriculum Designer. I am amazed at how well she can work with complexities, create structure and timelines, and facilitate conversations that reach desired results."

— Otisa Eads, HR Consultant & Strategist, Otisa Eads Consulting & Strategy, LLC



THANK YOU!

**Inspired by this organization's
success story?**

Get in touch with us to start your
journey toward outstanding results.

*Where strategy meets **heart**—and transformation begins*

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