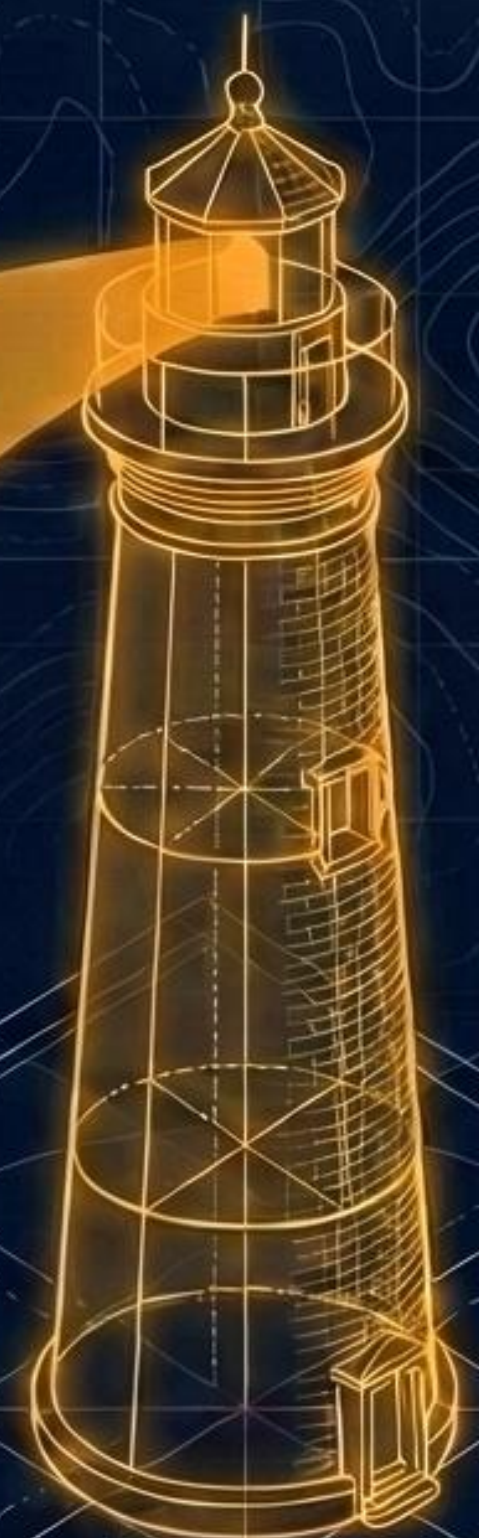


# Transformation DOs & DON'Ts

A Project Manager's Perspective  
on High-Stakes Deployments

Michael Briggs | Owner Partner

42 Years Enterprise Consulting (PBI, EMC, KPMG, North Highland) |  
State of FL Management Consultant | 3x Seminole 100 Honoree



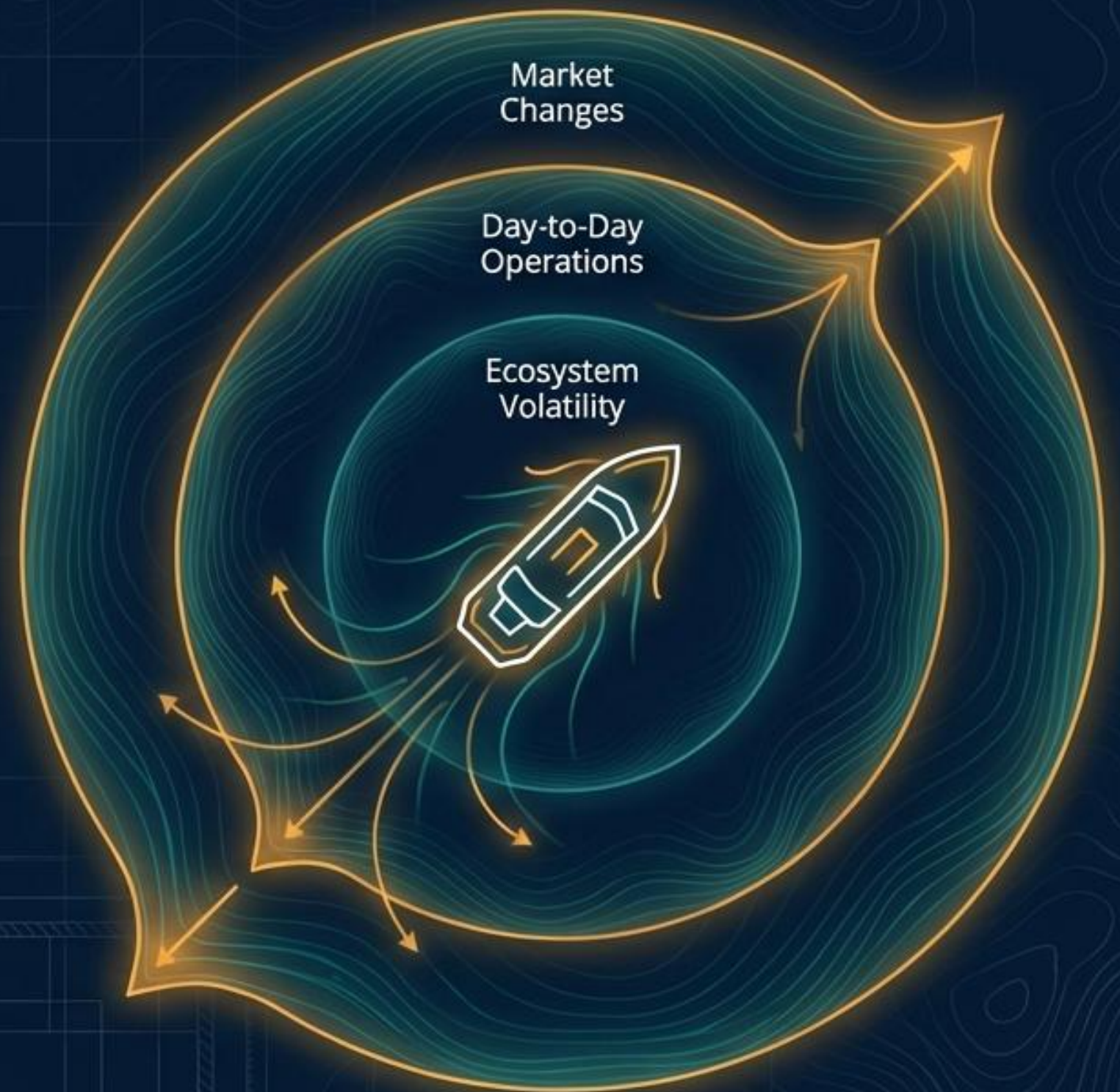
# Bold moves require a battle-tested blueprint.

Public and private sector transformations hold great promise, designed to adapt to a shifting marketplace. But these bold moves are executed in the middle of regular day-to-day operations.

## The Stake

Organizations aim for uninterrupted high performance. However, without extreme discipline, navigating these transformations is fraught with danger.

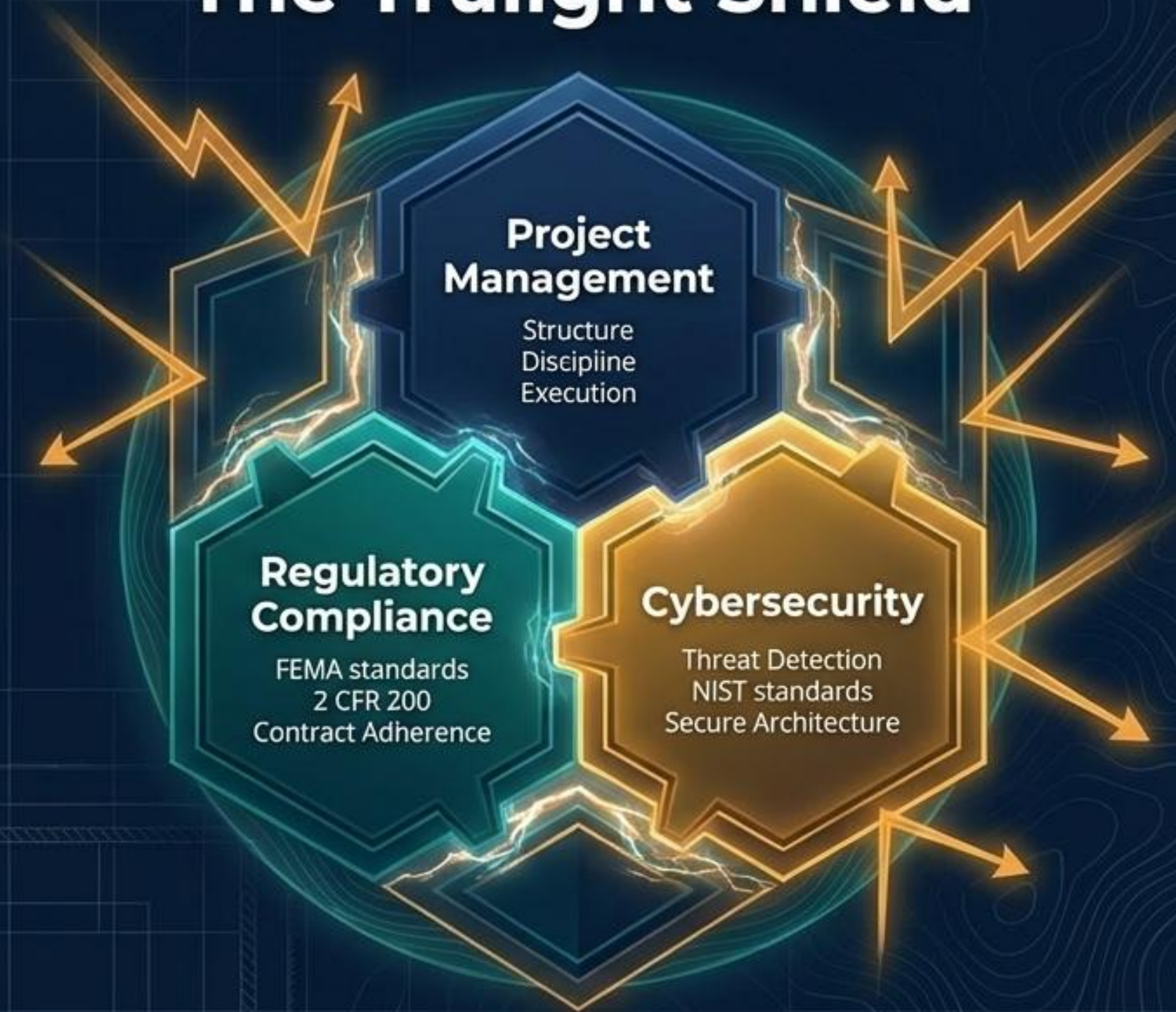
We must identify the practices to emulate—and the traps to avoid.



# Protecting the transformation lifecycle.

Successful state-level delivery requires more than just scheduling. It demands an integrated defense where rigorous Project Management is structurally reinforced by Regulatory Compliance and Cybersecurity.

## The Trulight Shield



# The 12-Step Transformation Blueprint.



This is not theoretical. Every phase is backed by a real-world project that succeeded or failed based on strict adherence to these principles.

# Phase 1: Foundation & Alignment

Before code is written or processes are changed, the structural integrity of the project must be forged. Misalignment here compounds exponentially down the line.

## Transformation Lifecycle Dial



**Phase 1:**  
Foundation &  
Alignment  
(Steps 1-4)

**Phase 3:**  
Delivery &  
Assurance

# Step 1: Project Charter



Define clear, ironclad scope and outcomes.



Leave ambiguity or assume implicit understanding.

**FIELD NOTES**

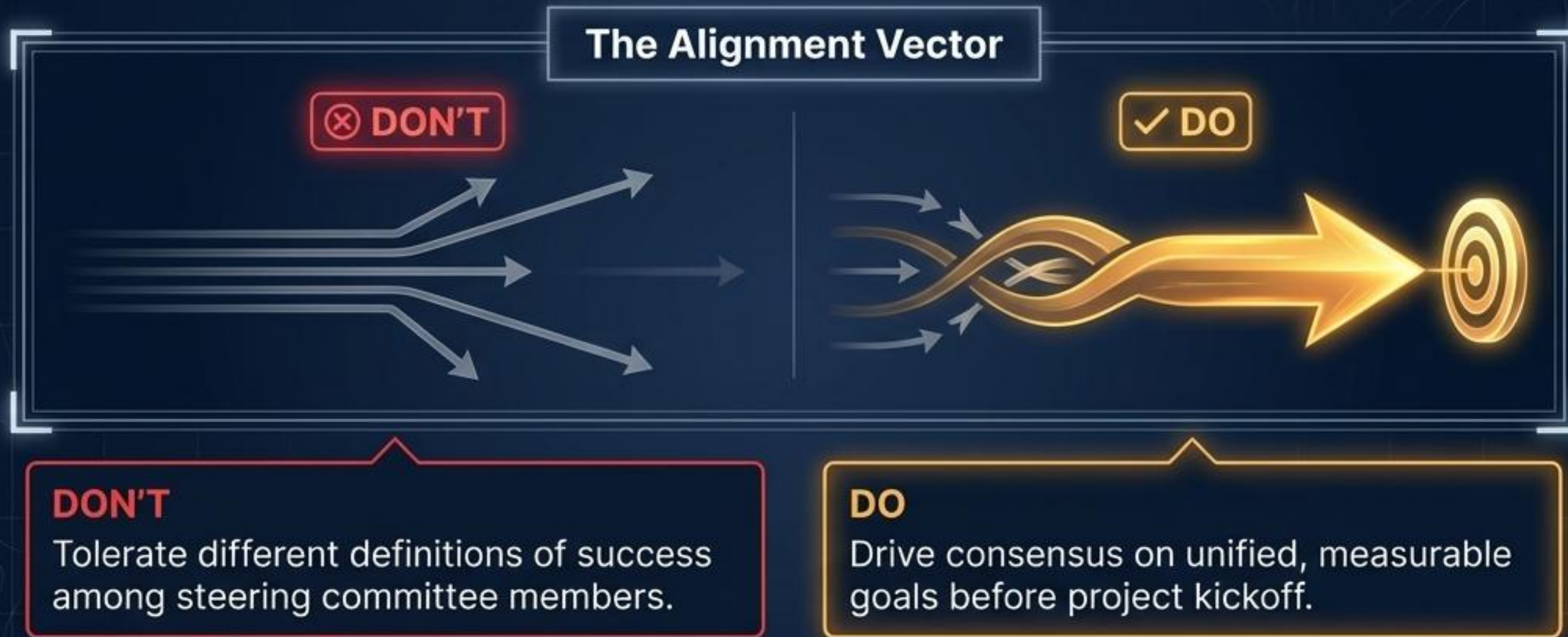
**The Arena:** State Healthcare Transformation

**The Action:** Writing a robust project charter for handling a 5,000-line Master Project Schedule

**The Result:** Ambiguity was engineered out early, preventing scope creep across multiple module vendors.

## Step 2: Success Factors

# Force alignment on measurable success factors.

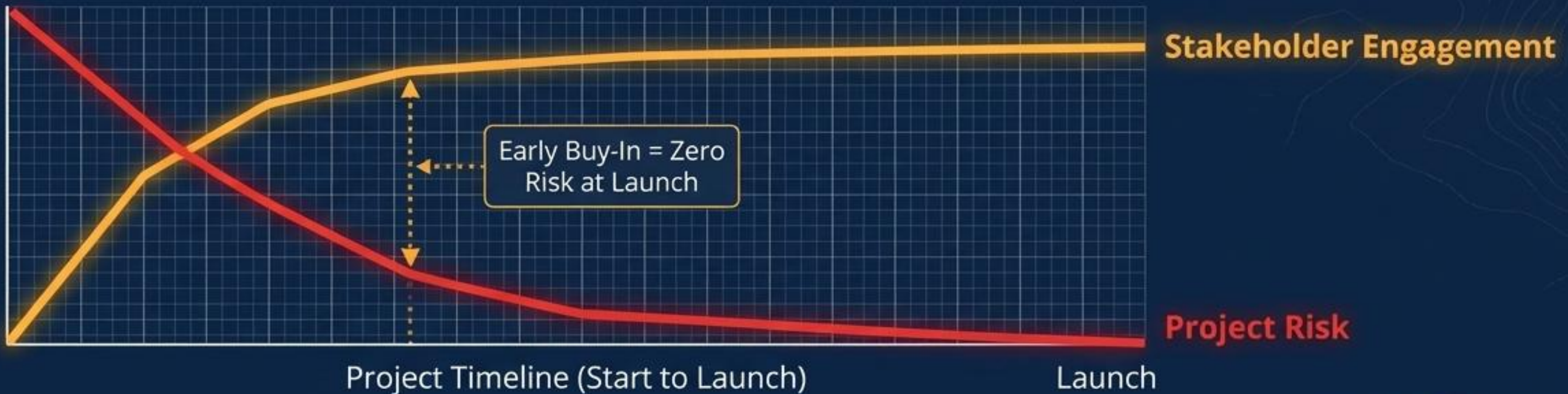


### FIELD NOTES

Field Notes: Citizens Property Insurance Corp.  
Forcing cross-departmental leadership to agree on single-source success metrics.

### Step 3: Stakeholders

# Engage stakeholders continuously, not conveniently.

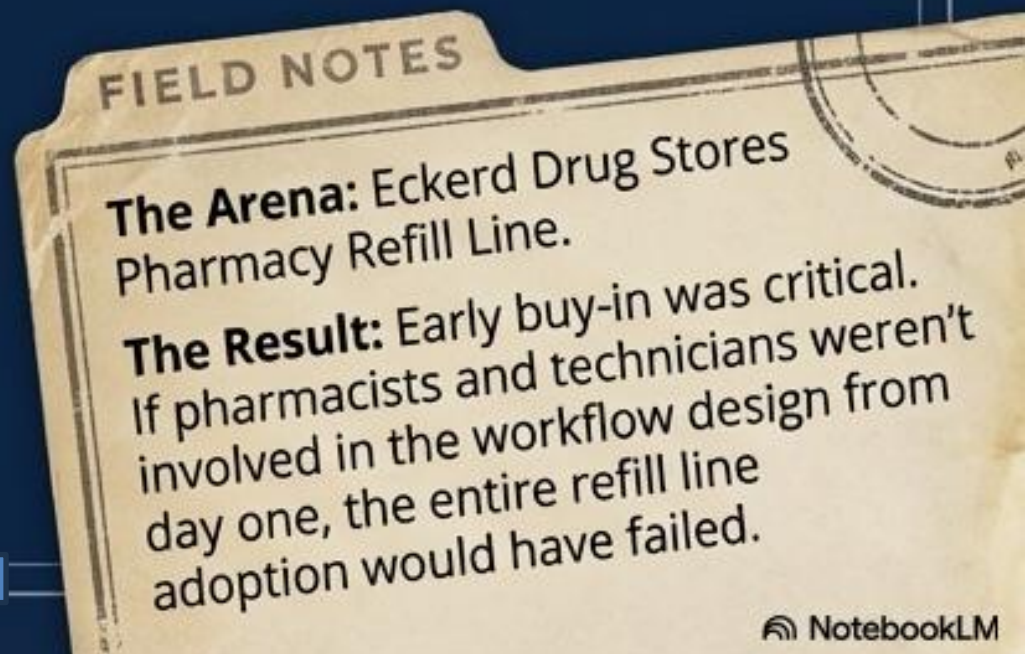


## DON'T

Engage stakeholders late in the process as a mere formality.

## DO

Embed them continuously in the business requirements, gap analysis, and product selection.



## Step 4: Contracts

# Translate contractual requirements into operational reality.

### DON'T

Ignore contract nuance and rely purely on standard PM methodologies.

### DO

Align every project phase directly to strict compliance and contractual deliverables.



### FIELD NOTES

**The Arena:** State Healthcare Transformation

**The Action:** Managing interconnections with external systems where strict Medicaid and CMS compliance dictated technical architecture.

## Phase 2: Execution & Governance

With the foundation set, the project engine turns over. This phase is defined by controlling moving parts, mitigating active risks, and empowering the right personnel.



# Step 5: Business Analysts & SMEs

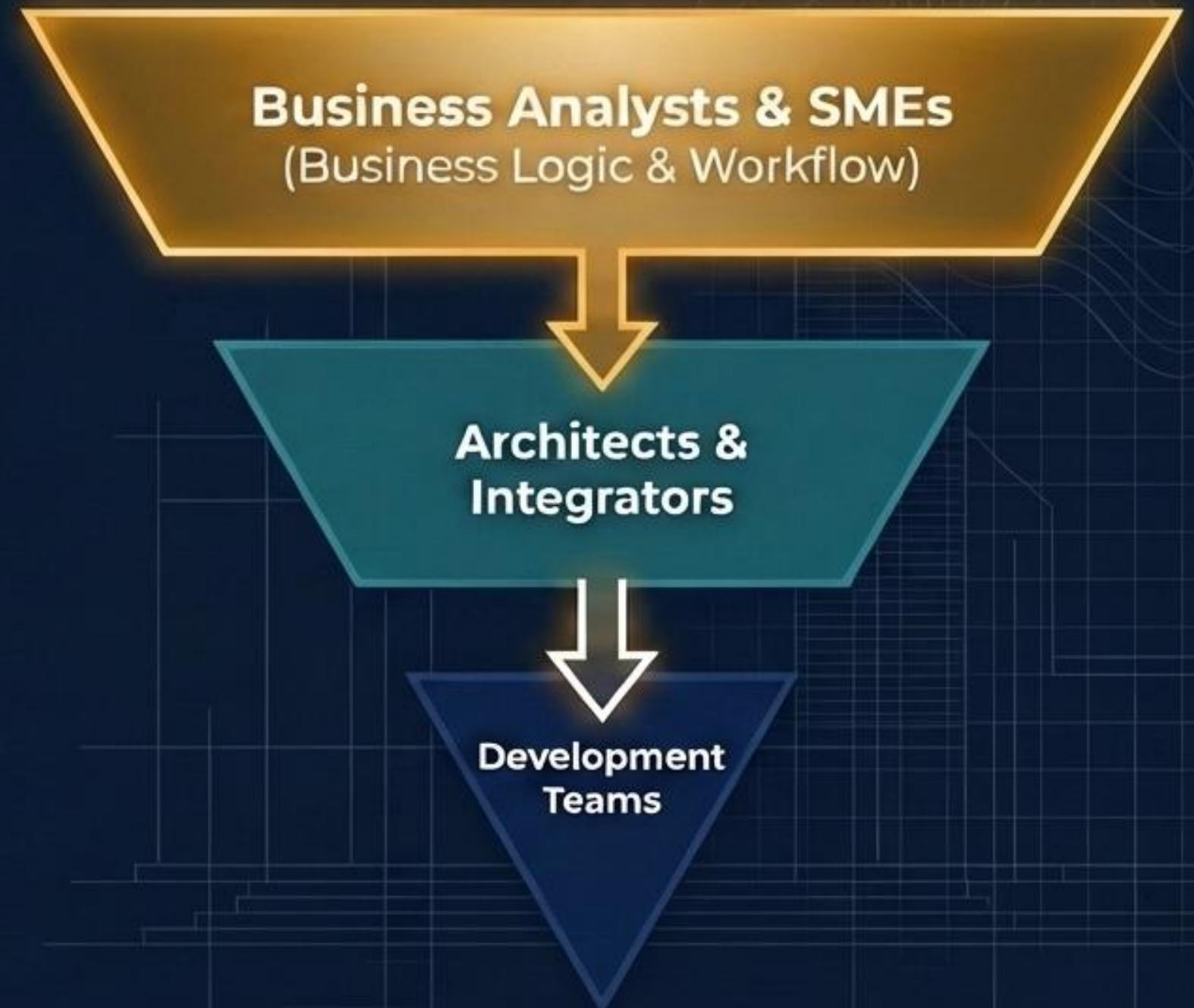
## Empower Business Analysts and SMEs as primary drivers.

### ⊗ DON'T

Treat BAs and SMEs as secondary support or afterthoughts.

### ✓ DO

Empower them to define the actual business logic that the technology must serve.



### FIELD NOTES

**THE ARENA:** Alamo Car Rental & State Healthcare Transformation.

**THE ACTION:** Redesigning the rental car application and document imaging workflow.

**THE RESULT:** The technology only succeeded because SMEs were empowered to dictate the exact flow of the rental transaction.

# Step 6: Offshoring

Implement strict governance protocols for offshore development.

## ✗ DON'T

Assume offshoring automatically equals cost savings without friction.

## ✓ DO

Use offshoring strictly under robust U.S.-based governance, quality assurance, and security oversight.



### FIELD NOTES

**THE ARENA:** State of Florida IT Deployments.

**THE RESULT:** Trulight ensures all development by IT staff is U.S.-based or governed strictly in accordance with State/Federal laws to prevent security vulnerabilities and massive rework.

# Step 7: IV&V

Leverage IV&V as a checkpoint, not a roadblock.

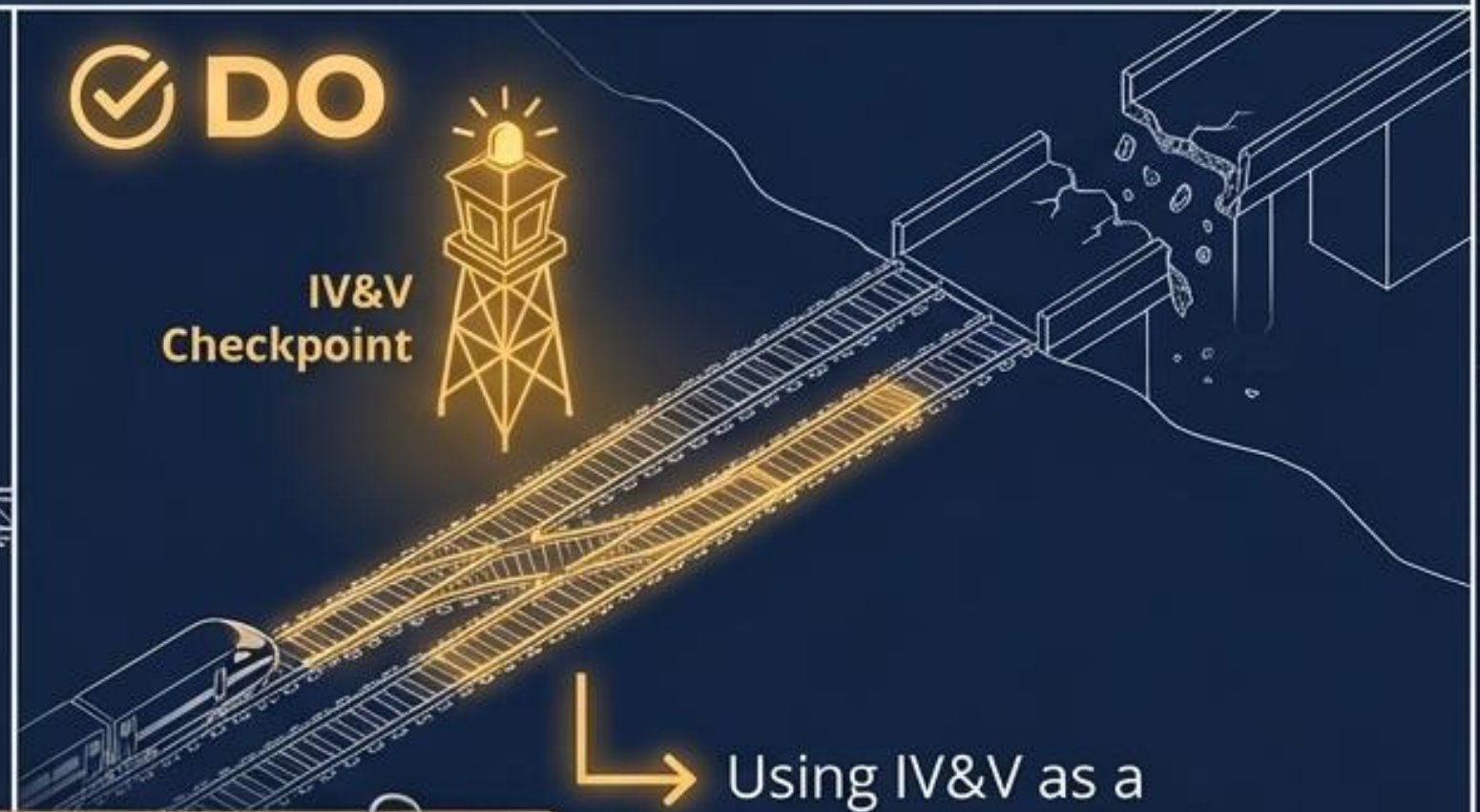
## The IV&V Gate vs. Wall

⊗ DON'T



→ Treating IV&V as an obstacle.

✓ DO



→ Using IV&V as a navigational checkpoint.

### FIELD NOTES

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**THE ARENA:** State of Florida.

**THE ACTION:** Using independent validation to identify structural flaws early, saving millions in late-stage remediation.

● **Step 8: Corrective Action Plans (CAP)**

# Deploy Corrective Action Plans (CAP) immediately.

## ✗ DON'T

Delay problems, hide technical debt, or hope issues resolve themselves.

## ✓ DO

Address issues early and aggressively through formal CAPs to prevent systemic failure.

### FIELD NOTES

**THE ARENA:** State Healthcare Transformation.

**THE ACTION:** Utilizing proactive risk registers and immediate CAP deployment to keep multiple module vendors aligned when integrations stalled.



CAP implemented early.



Problems delayed.

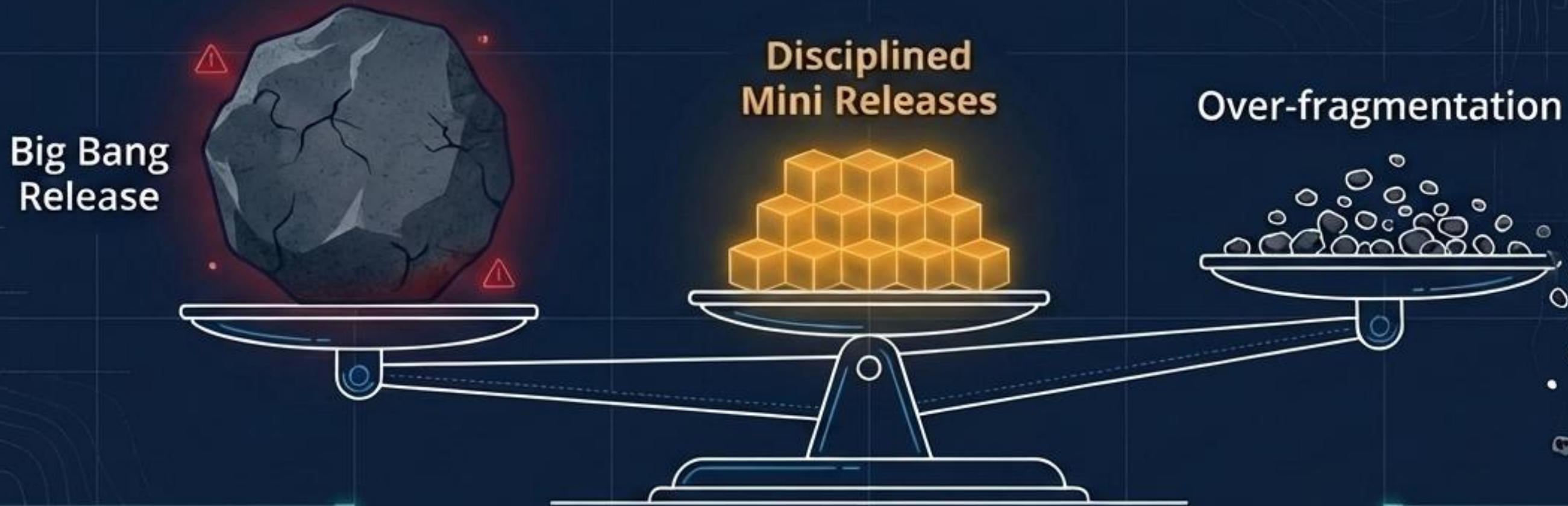
## Phase 3: Delivery & Assurance

The final mile is where projects face reality. This phase requires uncompromising discipline in testing, product delivery, and the psychological transition of the Go-Live event.



● Step 9: Mini Releases

# Control project scope through disciplined mini releases.



**✗ DON'T**

Over-fragment the product or rely on massive, high-risk monolithic launches.

**FIELD NOTES**

**THE ARENA:** State Healthcare Transformation.

**THE ACTION:** Managing module deployment to adapt to the changing CMS MITA landscape without breaking existing legacy systems.

**✓ DO**

Utilize structured mini-releases to deliver continuous value and isolate bugs.

## ● Step 10: Process over Product

### The Deliverables-Based Process vs. Demo-Driven Product

#### Deliverables-Based Approach (Process-Focused) (DON'T)

- ✗ Focuses on elaborate process and documentation over working software.
- ✗ Delays product building and testing until process requirements are met.
- ✗ High risk of project failure due to late product feedback.
- ✗ Creates a "big bang" release mentality by emphasizing process deliverables.

#### Demo-Driven Approach (Product-Focused) (DO)

- ✓ Focuses on frequent, working demos of the product.
- ✓ Enables early and continuous product feedback.
- ✓ Iteratively builds robust, scalable architecture through product focus.
- ✓ Ensures true stakeholder alignment and acceptance via product demos.

#### FIELD NOTES.

**State Healthcare Transformation** - Avoiding Process over Product, demanding frequent working demos to ensure alignment with evolving requirements and mitigate risk.

Step 11: Testing Phases

# Execute rigorous, uncompromised testing phases.

## ✗ DON'T

Rush testing to meet an arbitrary management deadline.

## ✓ DO

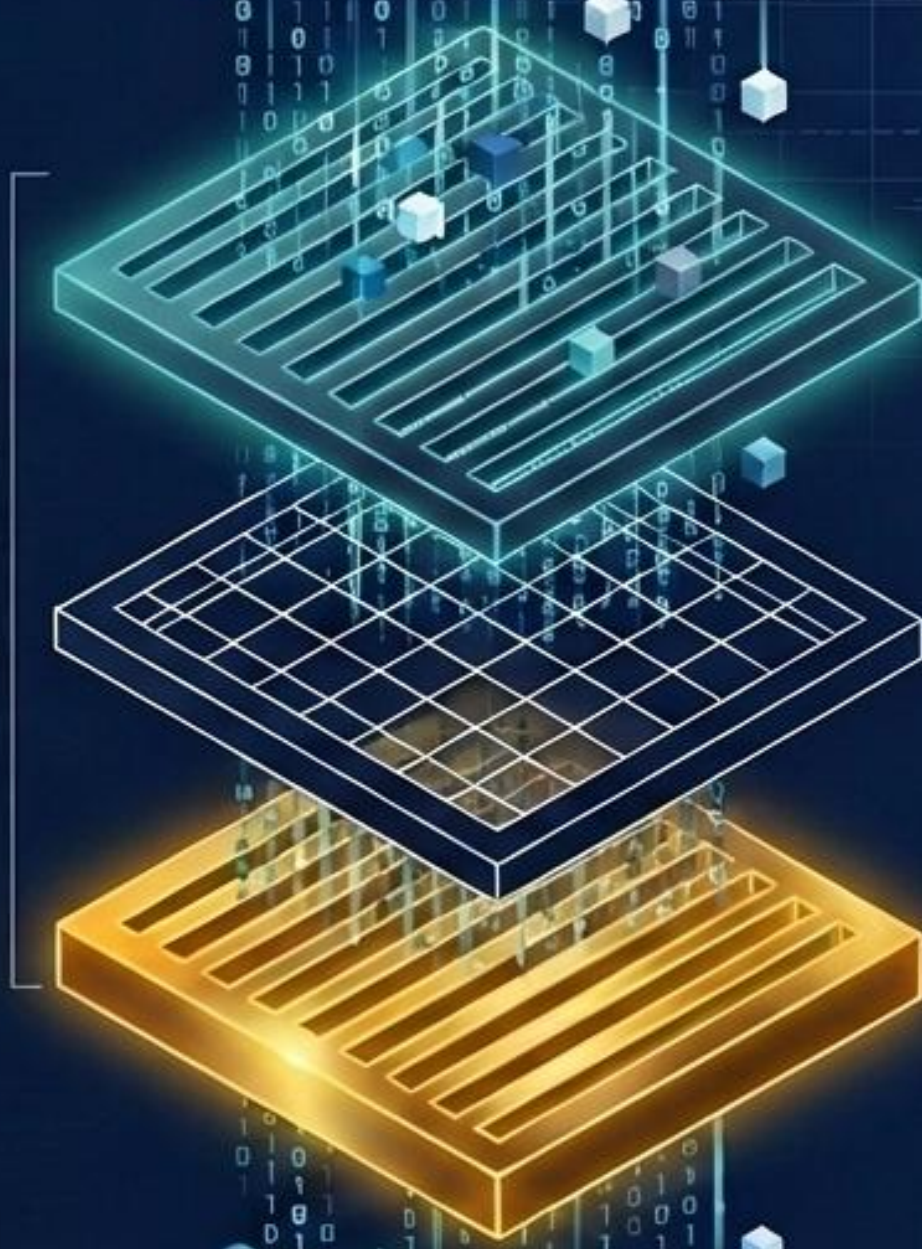
Be relentlessly disciplined. Subject the system to intense QA, intrusion methods, and integration checks.

### FIELD NOTES

**The Arena:** State Healthcare Transformation

**The Action:** Acting as the QA lead, managing business analysis and testing across complex Medicaid Enterprise module teams.

Security & QA Filter



1. Functional Testing

2. Load Testing

3. Cybersecurity Vulnerability Assessment

● Step 12: Go-Live & Lessons Learned

# Treat Go-Live as a transition, not the finish line.



**DON'T**

Treat Go-Live as the ultimate finish line and immediately disband the support structures.

**FIELD NOTES**

**The Arena:** Eckerd Drug Stores Pharmacy Refill Line.

**The Result:** Ensuring 'Just in Time' training so staff was prepared for implementation, taking the system

live with minimal negative impacts and high customer


**DO**

Plan thoroughly for the operational transition, maintaining hyper-care and applying lessons learned.

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# The Three Transformation Axioms

Beneath the charters, the CAPs, and the testing phases, successful transformations are governed by three overarching truths:



**1. Alignment > Strategy:** A mediocre strategy executed with perfect alignment will always beat a brilliant strategy executed by a fractured team.

**2. Communication > Documentation:** A 500-page unread project plan is useless. True connection with stakeholders drives adoption.

**3. Discipline > Speed:** Rushing testing or skipping governance for an optical 'win' guarantees systemic failure. Do the work.

# Questions



**Michael Briggs**

**Email:** [Michael.Briggs@trulightconsulting.com](mailto:Michael.Briggs@trulightconsulting.com)

**LinkedIn:** [linkedin.com/in/michaelbriggsinchrist/](https://www.linkedin.com/in/michaelbriggsinchrist/)

**Phone:** +1 (850) 210-4780