

## Case 1: Stabilizing a Stalled Enterprise Cloud Transformation

### Client

CSAA Insurance Group

### Environment

Large insurance organization pursuing enterprise AWS cloud migration.

### Situation

The organization had committed to a major cloud transformation initiative but lacked a unified governance structure. DevOps, SecOps, and Infrastructure teams were operating independently with no integrated program oversight. Leadership lacked visibility into execution progress, risks, and cross-team dependencies.

### Intervention

Established executive program governance across engineering and infrastructure teams and designed a structured transformation roadmap. Implemented portfolio-level reporting including scorecards, SOPs, and program tracking mechanisms to align workstreams and restore visibility for executive leadership.

### Outcome

Reestablished execution discipline across previously siloed teams and created a sustainable operating structure enabling coordinated cloud migration and enterprise adoption of AWS.

## Case 2: Coordinating Launch Readiness for National Payments Infrastructure

### Client

Federal Reserve System

### Environment

Launch of the FedNow real-time payments service.

### Situation

The organization was preparing the FedNow Operations Center to support national real-time payments infrastructure. Multiple readiness initiatives were underway across operations, product management, and technology teams. Portfolio visibility and coordination across readiness activities were limited.

### Intervention

Directed portfolio oversight and readiness coordination across operational initiatives supporting the FedNow launch. Implemented structured program review routines, coordinated resource allocation across teams, and aligned readiness activities with launch milestones.

### Outcome

Improved coordination across operations and product teams while establishing portfolio reporting that provided leadership with clear visibility into readiness progress supporting the national rollout of FedNow.

## Case 3: Restoring Governance During Healthcare Merger Integration

### Client

CVS Health

### Environment

Integration of CVS Health and Aetna healthcare organizations.

### Situation

Multiple integration workstreams supporting Medicare and Medicaid operations had fallen behind schedule due to fragmented reporting and unclear deliverable ownership. Leadership lacked a structured mechanism for coordinating cross-company execution.

### Intervention

Introduced deliverable-focused governance across three integration workstreams. Established weekly cross-company executive reviews and created reporting structures that replaced task-level updates with outcome-focused program communication.

### Outcome

Restored execution discipline and improved leadership visibility into integration progress while strengthening accountability across cross-company teams during a critical healthcare merger.