

Executive Insight Brief

Enterprise CRM Migration

Prepared for: Acme Corp

Snapshot #2

20 February 2026

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CONFIDENTIAL



Enterprise CRM Migration

Acme Corp
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ESCALATE

The Enterprise CRM Migration is at material risk of missing its Q2 2026 go-live date due to unresolved data migration dependencies and an under-resourced delivery team. Board-level intervention is required within the next 14 days to prevent a 3-month schedule slip.

SUCCESS PROBABILITY



58%

AMBER

PSP CLASSIFICATION

AMBER

2

CRITICAL/HIGH BLOCKERS

Attention



TREND DIRECTION

DECLINING

30-SECOND EXECUTIVE SUMMARY

SITUATION

A 9-month CRM migration programme is 5 months in and is already running 6 weeks behind plan. The data migration workstream — critical path — has stalled due to poor source data quality and a single-point-of-failure dependency on one contractor.

RISK

Without intervention, the programme will miss its Q2 2026 go-live, triggering a £340k contract penalty clause and leaving the sales team on the legacy platform through peak trading season.

THE ASK

Board approval to engage a specialist data migration firm (estimated £85k) and grant the programme director authority to pause non-critical workstreams and reallocate internal resource.

EXPECTED OUTCOME

With immediate action, go-live remains achievable by 30 June 2026 with confidence rising from 58% to an estimated 79%. Without action, probability of on-time delivery drops to 31% within 30 days.

Critical Blockers (2)

BLOCKER #1

19 DAYS

Data migration stalled — source data quality failure

Owner: Data Workstream Lead

Impact: Critical path delay of 6–10 weeks. Go-live shifts to Q3 2026, triggering penalty clause.

Action: UAT entry gate, parallel run, go-live sign-off

BLOCKER #2

12 DAYS

Single contractor dependency — key person risk

Owner: Programme Director

Impact: Loss of contractor would cause immediate 4-week delay and knowledge gap with no documented handover.

Action: Data migration, integration testing, hypercare planning

Key Findings

#	Finding	Business Impact	Evidence Source
1	Source data quality is significantly worse than baseline assessment indicated — 34% of customer records fail minimum migration validation rules.	Directly blocks UAT entry and threatens go-live. Sales ops cannot be migrated without clean data, leaving 1,200 reps on legacy platform.	Data migration validation run, Sprint 9 — 14 Feb 2026
2	The programme has no formal risk escalation path. Three HIGH risks have sat unescalated to the Steering Committee for over 30 days.	Governance failure means decision-makers lack visibility. Board-level decisions are being delayed at programme level, compounding schedule risk.	Programme risk register review — 18 Feb 2026

KEY DECISION REQUIRED

Approve emergency resourcing: engage specialist data migration contractor or defer go-live to Q3 2026.

Decide by: 6 March 2026

Recommended Executive Actions

ACTION #1

IMMEDIATE

Commission specialist data migration firm to perform source data assessment and remediation plan within 10 business days.

Owner: Programme Director

Impact: Unblocks critical path and recovers 4–6 weeks of schedule slip.

ACTION #2

THIS WEEK

Initiate knowledge transfer and documentation sprint with current contractor before contract end date.

Owner: Technical Lead

Impact: Eliminates key person risk and protects programme continuity regardless of contractor status.

ACTION #3

THIS WEEK

Escalate to Steering Committee: formally request go/no-go decision on Q2 vs Q3 go-live with updated risk register.

Owner: Programme Director

Impact: Provides governance clarity and unlocks budget authority for emergency resourcing.

Path to Success

Immediate engagement of data migration specialists recovers the critical path. Parallel knowledge transfer eliminates contractor dependency. Steering Committee provides go-live authority and budget flexibility. Programme enters UAT on revised schedule by 15 April 2026.

PROBABILITY SHIFT

WITHOUT ACTION

31% by 30 Mar 2026

WITH ACTION

79% by 30 Jun 2026

Trend Analysis



DECLINING

MODERATE

Confidence Statement

Data Sources	AI-analysed questionnaire responses and documentation
Methodology	6 specialist AI agents evaluating business outcomes, blockers, and stakeholder impact
Limitations	Analysis based on point-in-time snapshot; may not reflect real-time changes
Confidence Level	MEDIUM Based on 2 blockers, 3 actions, 0 outcomes analysed

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SAMPLE REPORT

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- ✓ Real-time project health tracking across snapshots
- ✓ Business outcomes at risk with threat analysis
- ✓ Full blocker analysis with cascade impact
- ✓ Success path with milestone tracking
- ✓ Trend analysis with velocity indicators
- ✓ Confidence assessment with data quality metrics
- ✓ Board-ready executive briefing format

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