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There Is a Hole in Your Plan!

Finding and Filling the Gaps That Derail Projects

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Takeaways

1. Spot where hidden gaps and assumptions most often hide
2. Pressure-test plans and catch early warning signs
3. Respond constructively when reality doesn't match the plan



Every plan has a hole in it

The best project plans aren’t perfect.

They’re prepared.

Most projects don’t struggle because there was no plan.

They struggle because of what the plan **assumed, overlooked, or never revisited.**





Where the holes hide

Four places holes like to hide

1

People

Missing stakeholders, unclear ownership, weak cross-functional communication

2

Process

Undefined approvals, escalation paths, and exceptions

3

Technology and data

Integration assumptions, data quality, security, testing

4

Change and adoption

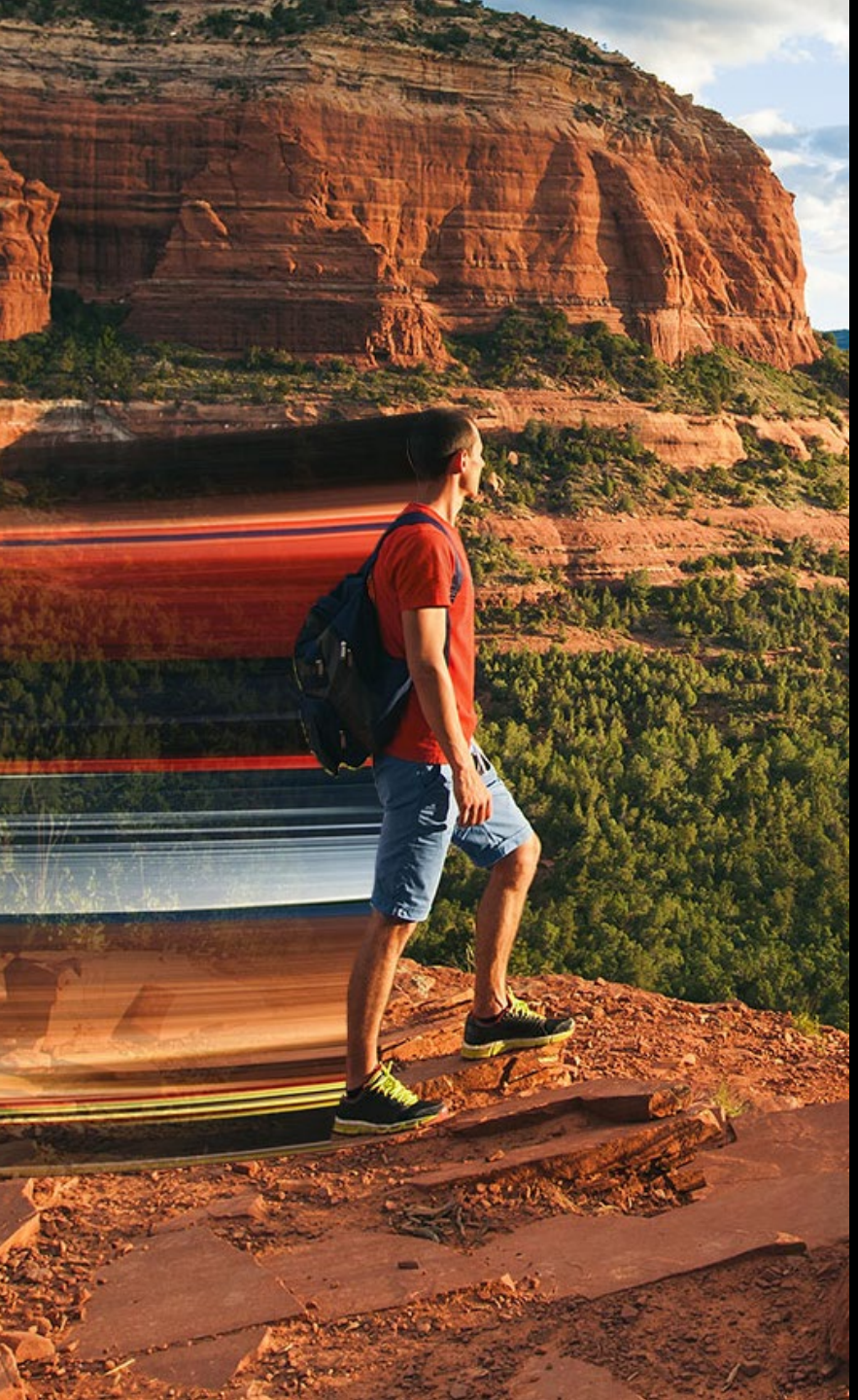
Training, communication, and operational readiness



When the plan meets reality

Anatomy of a project gap

1. What were we trying to accomplish?
2. What did the plan assume?
3. How did the gap show up?
4. Were there warning signs?
5. How did the team respond?
6. What would we do differently?



Case study: Brazil implementation to Passport

Case study: Brazil implementation to Passport

Paloma Villasana, Citi | The one country of ~90 not yet on Passport

THE GOAL

From

A local system for litigation only (mainly employment). Non-litigation work not formally tracked.

To

Full matter management on Passport, aligned with global standards for eBilling, budgets, accruals, and rate management.

WHAT THE PLAN ASSUMED

Tax workstream

Knew early that Brazil tax legislation changes effective January 1, 2027. Built a configuration-driven solution in Passport so tax codes could change.

This part was done right.

Accounts payable workstream

Spent significant time aligning on Brazil's existing AP flat-file invoice specifications.

Every conversation was framed around 2026 taxes.

THE HOLE

We assumed AP already knew what Tax knew. Only local AP was aware of the 2027 change.

Four holes and how we filled them

WHERE THE HOLES WERE

1 People

Roles weren't clearly defined. Accountability was assumed, not assigned.

2 Process

No checkpoint confirmed that AP leadership knew about the 2027 tax change.

3 Technology and data

Configuration was ready, but you can't configure tax codes AP hasn't defined yet.

4 Change and adoption

The plan has to be a living document. Bring in regression testing and operations early.

HOW WE FILLED THEM

1 Joint planning

Brought AP leadership and Tax into the same room. No more parallel workstreams.

2 Retargeted go-live

Moved to mid-Q1 2027 so AP could build the new tax codes. Credibility over optimism.

3 Named owners

Defined roles across Tax, AP, and the Passport team. Every dependency got an owner.

PALOMA'S PRINCIPLE

Red has to become green again. Never deliver bad news without a recommended path forward.



Case study: Tax code update and new Coupa integration

Case study: When Coupa and/or TyMetrix 360° Changed, Payments Broke

Pamela Ilieva, Marsh | Invoice-to-payment flow across TyMetrix 360°, Coupa, and Oracle

THE GOAL

Goal 1

To enable automatic tax adjustments in TyMetrix 360° which should then flow into Coupa seamlessly.

Goal 2

To begin the process of enabling payments by site-IDs/OUs coming from different jurisdictions per one vendor profile.

WHAT THE PLAN ASSUMED

Project 1: Tax Code Update

Technology and Procurement updated Coupa. The TyMetrix 360° coding was updated to match.

Somewhere along the way, the codes ended up different.

Project 2: New Coupa integration and site ID update

Testing in Staging worked, so the integration moved to Production.

Staging, Coupa, and Oracle weren't updated to match Production.

THE HOLE

The projects were finalized by people who were not initially involved and were not aware of the gaps which took place in the first place.

Four holes and how we filled them

WHERE THE HOLES WERE

1 People

Coupa changes and TyMetrix 360° updates were handled by separate teams. Generally, procurement, finance and legal ops teams were involved.

2 Process

Testing was signed off in a Staging environment that didn't mirror production entirely. This was missed in the early stages by the people initially involved.

3 Technology and data

Tax codes diverged across systems. Invoices failed payment processing en masse.

On the other project, invoices were showing ‘Processed’ but were not actually processed and were stuck in limbo between the systems.

4 Change and adoption

Early gaps weren't caught before full adoption, and the impact hit at fiscal year end.

HOW WE FILLED THEM

1. **Partnered with Wolters Kluwer and involved more stakeholders internally**
   Worked directly with Wolters Kluwer to diagnose and resolve the integration issue.

2. **Reconciled the data manually, one by one**
   Compared TyMetrix 360°and Coupa to confirm which invoices were actually processed.

3. **We worked with procurement team to create an automated error report to show when invoices do not flow into Coupa**
   The assumption for years was that if an invoice fails payment processing, this is the only time it doesn’t flow into Coupa.

PAMELA'S PRINCIPLE: Never assume.

- Never assume that people know what they are doing.
- Never assume the written process is what it actually is.
- Never assume the technology can actually handle change.
- Never assume that you have the perfect plan. There will always be something after adoption.



Filling the holes before they grow

Five practices to close the gaps

1

Look beyond the workplan

Ask who and what isn't on the page

2

Pressure-test assumptions

Invite challenge before work begins

3

Own every dependency

Every dependency needs a named owner

4

Watch for early warnings

Make it safe to raise concerns

5

Revisit when reality changes

Treat the plan as a living document

Three questions to take home

1

What are we assuming?

Write the assumptions down and test the big ones.

2

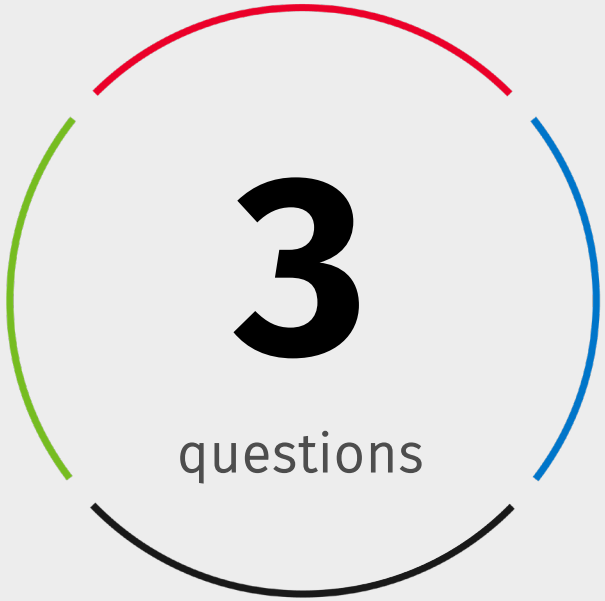
Who isn’t represented?

Find the stakeholder you haven’t heard from yet.

3

How will we know early if something is going wrong?

Agree on the warning signs before you need them.





Thank you!

Questions? Grab another donut hole.

Wolters Kluwer