

Red Health Accounts Turnaround Program

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100+ stalled ERP implementations sat in **red health** across the CSM and Implementation Consultant portfolio, each stuck for a different reason, each handled with the same generic check-in. **This is the framework I built to fix that.**

THE PROBLEM

When an account is flagged "red health," the instinct is to treat it as one problem: the project is behind. In practice, every stalled account was carrying a completely different root cause under that same red flag. Without a way to tell those causes apart, every account got the same response: a status-check call and a hope that the client would move faster. That approach doesn't scale past a handful of accounts, and it did nothing to prevent the same pattern repeating on the next stalled deal.

STEP 1 Diagnose Reviewed every red-health account individually against a fixed set of signals, rather than relying on a generic "behind schedule" label.	STEP 2 Categorize Sorted each account into one of four root-cause buckets based on where the actual blocker sat.	STEP 3 Apply Playbook Ran the specific recovery playbook built for that category instead of a one-size-fits-all response.
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THE FRAMEWORK — 4 ROOT CAUSES

01 READINESS Client wasn't internally set up to move forward.	02 FEATURE GAP Blocked on product capability that didn't exist yet.	03 COMMS Client and consultant drifted out of alignment.	04 RESOURCE Client's own team lacked enough people to execute.
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01

Client Readiness

SIGNALS

Repeated missed deadlines on the client's side, no internal champion driving the project, data not migrated or cleaned, key stakeholders not aligned internally.

PLAYBOOK

Named a single client-side point of contact, broke remaining work into a checklist with owners and dates, and ran short recurring syncs to keep momentum instead of waiting for the client to self-initiate.

02

Feature Requests & Development Gaps

SIGNALS

Client explicitly waiting on functionality that didn't exist, an informal workaround already in use, or a product ticket sitting in the backlog with no clear owner or timeline.

PLAYBOOK

Escalated into the product roadmap conversation with a quantified business case, while designing an interim manual or configuration-based workaround so the implementation could keep moving without waiting on dev timelines.

03

Communication Breakdown

SIGNALS

Client surprised by a status update, conflicting expectations between different client stakeholders, action items with no clear owner, or a meeting cadence that had quietly lapsed.

PLAYBOOK

Ran a reset meeting bringing every stakeholder back to one shared source of truth, assigned a single accountable owner per workstream, and kept a written follow-up trail for every commitment going forward.

04

Resource Constraint

SIGNALS

One client contact handling every task alone, assigned tasks not started, or repeated requests from the client for timeline extensions without a readiness issue behind them.

PLAYBOOK

Flagged directly to client-side management with a specific ask, roles or headcount needed, and a business case for the cost of continued delay, which typically brought in additional client resources to unblock the account.

100+

STALLED DEALS
DIAGNOSED

30%

FEWER STALLED
IMPLEMENTATIONS

40%

FASTER GO-LIVE
RECOVERY

95%

CLIENT
RETENTION

"Most 'stuck' accounts aren't stuck for the same reason. Treating them all the same is why they stay stuck."