

The project is green. The business still isn't seeing results.

A closer look at what happens between technology delivery and business results.

3 PRACTICAL EXERCISES · A 9-QUESTION PROJECT CHECK



■ READ

The Project Is Green. The Business Still Isn't Seeing Results.

The team is hitting its dates. The new platform works. Everyone has done their part. Then someone asks, “What got better for the business?” If that answer is hard to pin down, it is worth looking at what happened after delivery.

These pages offer a way to understand that gap, plus three exercises you can try on your own project. Keep one project in mind as you read.

THE PROJECT

Platform ready. Milestones on track.

THE BUSINESS

Still waiting for the change behind the investment.

■ READ

The report says we're making progress. Is the work?

Picture an insurer rolling out a tool to review case files. The team delivers on time, and the tool is available. Yet for some cases, people still copy information into a separate spreadsheet to get the job done. This is an illustrative example, not a client story.

The report tells us what was delivered. The people using the tool can tell us what happens next. If no one has defined how to recognize the benefit, both stories can live side by side for months.

Go back to the original promise. Was it fewer returned files, less time per claim, or better quality? To know whether that happened, we need a baseline and a reasonable date to measure against. If the benefit was not due yet, calling the project a failure would be unfair. But if no one can say when or how we will see it, there is a conversation to have.

Illustrative example. In a real project, review cases and system records, and talk with the people doing the work.

THE STATUS REPORT

The new tool is live.

DAY TO DAY

A side spreadsheet still helps finish cases.

■ READ

Delays have a cost. First, find where it shows up.

CAQH estimates that the United States could still save about \$21 billion by automating medical and dental administrative transactions. Using 2023 data, Premier estimates that handling initially denied claims cost healthcare providers about \$25.7 billion. These figures describe different problems. They should not be added together or presented as losses from a particular project. [1] [2]

In your organization, the cost may start with something tangible: a file returned for correction, two people entering the same information, or a decision that leaves a claim waiting. Ask how often it happens and for how long it has been happening.

When a change gives hours back to the team, that may create capacity to handle more cases. It does not necessarily reduce cash spending. Keeping those two ideas straight makes the value conversation more credible.

\$21 BILLION

Potential remaining U.S. administrative transaction savings. CAQH.

\$25.7 BILLION

Estimated provider cost of handling initially denied claims. Premier.

Different estimates. Different problems. These figures are not a project-loss total.

■ READ

The tool is ready. What stands between that and results?

Delivering a tool makes improvement possible. People then have to use it to complete real cases, daily work has to change, and the business needs to see the benefit. Each step calls for different evidence.

Consider document review for insurance underwriting. The system extracts information, but no one has agreed on what to do with files that contain exceptions. The team goes back to email and Excel to resolve them. The tool does its job; we still do not know whether returned files have decreased.

Following the whole path lets us credit the work already done and see what remains. It also helps locate the cause: perhaps the issue is an undefined rule, a team with no time, or a step nobody owns.

DELIVERY

The system exists.

USE

Cases are completed there.

OPERATIONS

Rework goes down.

VALUE

The benefit becomes visible.

■ EXERCISE 1 OF 3

Where do the results get lost?

Think of a specific project. Walk through the four stages and mark the first one you cannot support today with a number, a case, or a recent observation. You do not need to solve it here. Just find the gap.

For example: “We delivered the platform, but we do not know how many files are completed there without returning to the old process.” That missing fact tells you more than an overall project rating.

The first step I cannot verify:

The case or record that could help:

DELIVERY
What is ready?

USE
Do cases finish there?

OPERATIONS
What changed in daily work?

VALUE
What benefit can we see?

A real case gives this exercise its value.

■ READ

Sometimes the missing piece is a decision.

A team can stay busy all day while a case goes nowhere. Think of an exception that passes through business, technology, and operations with no agreed rule for resolving it. Each group finishes its part; the full case still waits.

RAND interviewed specialists about AI projects and found recurring problems, including misunderstanding the business need and working with inadequate data or infrastructure. This qualitative study suggests causes to investigate; it does not establish an overall failure rate. [3]

To understand a delay, trace one recent decision. When was it requested? What information was missing? Who had the authority to decide? What work stopped in the meantime? The answers can tell you whether the team needs a rule, a decision owner, or help gathering the facts.

EXCEPTION

A case falls outside the rule.

DECISION

No agreed criterion or owner.

WAIT

The case returns to the queue.

■ READ

Going live does not mean the work gets done there.

The tool may be available, and people may have completed training. That still does not tell us whether they can finish their work with it. If the new path takes longer, leaves exceptions unresolved, or requires everything to be entered twice, going back to the old way makes sense. Implementation research distinguishes adoption, how a tool is used, cost, and whether use continues over time. [4]

The useful question depends on the process. For healthcare claims, we might ask how many eligible cases are completed in the new system at the expected quality. For insurance underwriting, we might track whether fewer files are returned for missing information.

Watching someone work through a real case often teaches us more than a training attendance count. If a side spreadsheet still exists, start by asking what problem it solves.

AVAILABLE

The tool is live and training happened.

USED

Can people finish the work there, with quality?

■ READ

A complete team changes what the project can deliver.

Adding more people will not always clear a delay. The team needs time to do the work, knowledge of the process, authority to make decisions, and someone who connects the departments and vendors. When one piece is missing, others fill the gap with emails, manual checks, and temporary workarounds.

In a global PMI survey published in 2025, respondents with stronger business acumen reported that 83% of their projects met business goals. The figure was 78% for the comparison group. This is an association, not a promise that hiring one person will produce a five point gain. [5]

When you assess a team, look at the decisions it can move forward, the handoffs it can connect, and the quality it can sustain under pressure. An open role, a leader with no time, or a budget that only covers installing the tool can push the expected benefit further out.



AI-generated image. Fictional professionals, not an actual AgilePM team.

■ EXERCISE 2 OF 3

What is the gap costing?

Choose a bottleneck you know. Is a case waiting, a file returning for correction, or a task being done twice? Write down the fact you need to estimate the time or money involved. You do not have to calculate a saving yet.

For example: “Incomplete claims come back to the team. I need to know how many come back each week and how long each correction takes.”

The bottleneck and its effect:

The missing fact and who could find it:

BOTTLENECK
Where does the case stop?

EFFECT
What waits or gets repeated?

DATA
What would let us measure it?

A real case gives this exercise its value.

■ READ

The price of a team and the value of its work.

A rate or salary tells us what we pay for a person. A sound decision also accounts for onboarding, who supports the person, repeated work, and how long it takes to get results. If nobody can decide what to do with exceptions, adding someone at a lower rate may leave the wait untouched. An experienced specialist still needs access and authority to help.

A Latin American team may bring relevant experience, specialized skills, and overlapping work hours with the United States. You have to assess that in the actual people and project. Salary differences across countries are not, by themselves, a client's savings. Nor do they prove that one nationality is more productive. [6]

The budget needs to cover the team required to do the work, support the change, and measure it. A useful comparison puts two ways of doing the same work side by side, over the same period and to the same quality standard: the full cost of each and the results each can deliver.

VISIBLE PRICE

The rate or salary.

FULL COST

Onboarding, oversight, corrections and time to results.

■ EXERCISE 3 OF 3

The conversation that could move the project.

Think of a real case and choose one question whose answer could change what leadership thinks it knows. For example: “What evidence shows that the new process has reduced claim corrections?”

The question we need to answer:

Who can answer it, and what I would ask to see:

If finding the answer means talking with several teams, you have already learned something. The project may need a shared decision and a team with the time and capacity to put it into practice.

Agustín and Agile PM can help examine that point and coordinate the work when a technology delivery has yet to become a business improvement.

SPONSOR

What benefit did you expect?

OPERATIONS

What work is still stuck?

DELIVERY

Which decision needs an owner?

A real case gives this exercise its value.

■ PROJECT CHECK

A quick check: nine questions worth asking.

Check “Yes” only if you can point to a number, a recent case, or a documented decision. “Not sure” is useful too: it flags a conversation your team may not have had yet.

QUESTION	YES	NO	NOT SURE
RESULTS / Does the business goal have a baseline and a date for measurement?	☐	☐	☐
RESULTS / Does operations see the same progress shown in the status report?	☐	☐	☐
RESULTS / Can a real case finish in the new workflow without a side spreadsheet?	☐	☐	☐
DECISIONS / Do we know how many cases return to the old process?	☐	☐	☐
DECISIONS / Do common exceptions have an agreed rule and an owner?	☐	☐	☐
DECISIONS / Does the decision blocking the next step have an owner and due date?	☐	☐	☐
TEAM AND COST / Does the team have the time, experience, and authority to support the change?	☐	☐	☐
TEAM AND COST / Do we measure wait time, corrections, or duplicate work with our own data?	☐	☐	☐
TEAM AND COST / Can we show a realized benefit as well as completed milestones?	☐	☐	☐

The answer that gives me pause: _____

Who could show me the evidence? _____

Editorial reflection tool. Not a validated scale or performance score.

SOURCES AND SCOPE

Where the numbers come from.

These figures come from studies covering different periods and questions. They help show the scale of certain problems; they do not calculate the loss on your project. The examples in this guide illustrate possible situations.

[1] CAQH 2025 Index

2024 U.S. administrative transaction data

[2] Premier, 2025

Initially denied claims, 2023 data

[3] RAND, 2024

Qualitative interviews on AI project failures

[4] Proctor et al., 2011

Implementation outcomes

[5] PMI, 2025

Pulse of the Profession, global survey

[6] PMI, 2023

Earning Power, historical salary comparison

Further reading: AHRQ workflow evaluation tools; NAIC survey of AI use by health insurers (2025).

To assess a specific initiative, find out how the work ran before, what is happening now, what it costs, and when the benefit was expected.



WHEN THE NEXT PROJECT IS ON THE TABLE

Let's talk it through.

Bring one real project. Agustín can help you look at where work slows down and what it would take to move forward.

[Message Agustín on WhatsApp ↗](#)

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All photographs and on-screen project figures were generated with AI for illustration. The people and metrics are fictional.

