HELM360™

CASE STUDY

ELITE 3E TRANSFORMATION TURNAROUND AND FULL IMPLEMENTATION

Client: Harneys **Industry/Sector:** Law Firm

Client Profile

Harneys is a leading international offshore law firm with a multi-jurisdictional footprint across key global financial centres. The firm supports complex cross-border legal and financial operations and has undertaken a major finance transformation, replacing its legacy Elite Enterprise platform with an on-premises Elite 3E solution.

Challenge

Harneys initiated its Elite 3E transformation using a multi-supplier delivery model involving, Elite, multiple 3rd party vendors, independent consultants, and project managers. As the programme progressed, the complexity of coordinating multiple internal and external stakeholders across jurisdictions and time zones began to create delivery pressures. With the impending end of life of Elite Enterprise, there was no further leeway available.

The programme experienced:

- Increased cost exposure relative to progress achieved
- Overlapping responsibilities across delivery partners
- Governance processes that required strengthening to support executive visibility
- Evolving requirements as business needs became clearer
- Customisations and integrations that required further refinement and testing
- Coordination challenges across vendors and third-party stakeholders

As with many large-scale, multi-stream transformation programmes, the firm recognised the need for stronger centralised ownership, clearer accountability, and tighter governance to ensure successful completion.

Harneys engaged Helm360 to consolidate delivery, stabilise the programme, and drive the implementation through to a successful go-live.

Scope of Work

Helm360 assumed end-to-end ownership and managed the implementation and recovery effort.

1) Programme Takeover and Governance Reset

- Established a strong governance model with executive oversight
- Introduced clear ownership and accountability
- Implemented structured steering committees and decision gates
- Took responsibility across all project streams through to go-live

2) Design Close-Out and Salvage

- Performed deep discovery of delivered (to date) vs required scope
- Produced salvage reports to rationalise customisations and ensure minimal previous work was discarded
- Closed requirements gaps and refined solution design
- Finalised requirement traceability matrix (RTM[HP1] [BD2] [BD3] [HP4]), solution design, and go-forward plans

3) Build and QA

- Completed redevelopment of customisations and integrations
- Delivered structured QA and automated testing
- Strengthened issue tracking and resolution processes
- Applied repeatable testing frameworks using the Helm360 automated testing solution.

4) UAT and Acceptance

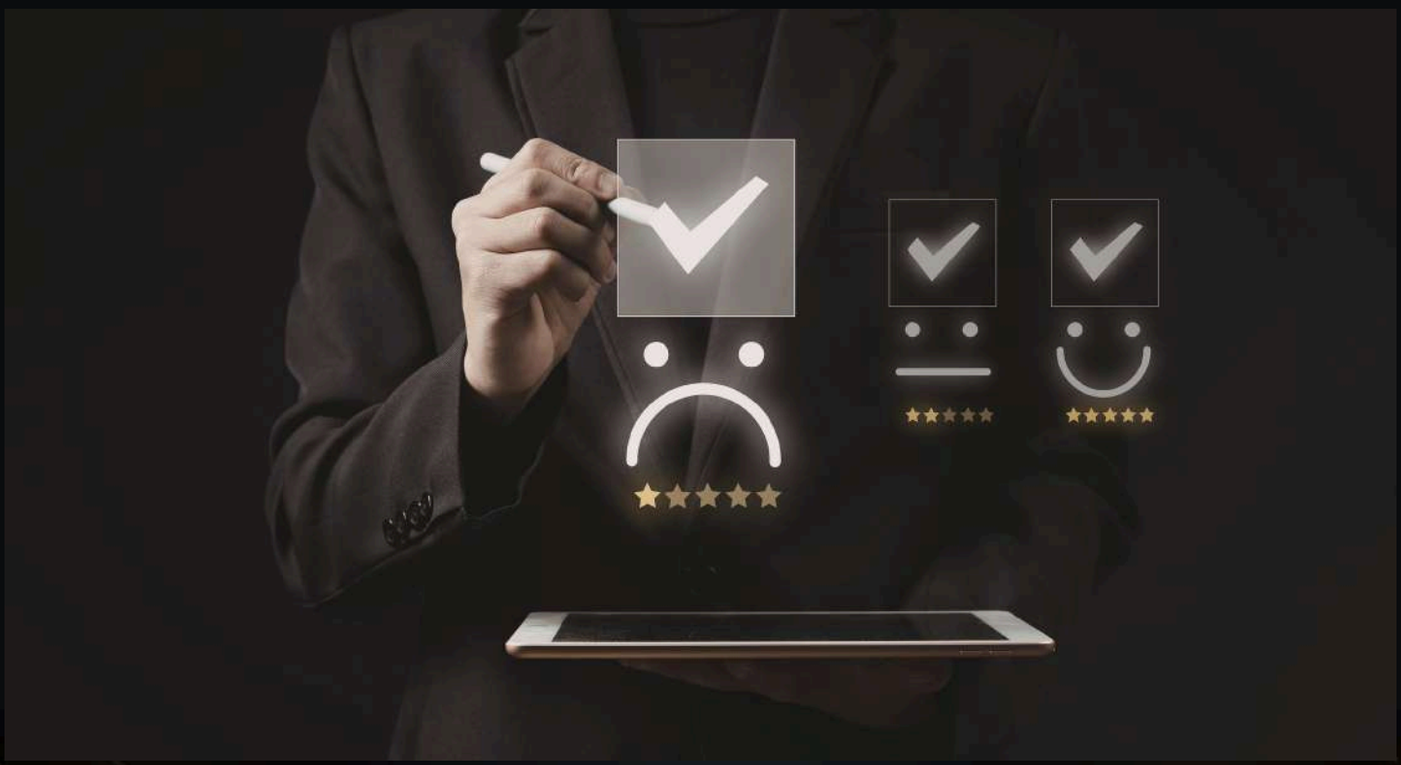
- Supported UAT preparation and execution
- Partnered closely with SMEs for validation and sign-off
- Ensured business readiness

5) Deployment and Go-Live

- Led cutover planning and dress rehearsals
- Supported final data conversions and validation
- Provided go-live and hypercare support
- Delivered knowledge transfer and handover

Outcomes

- Successful turnaround of a high-risk programme
- Go-live achieved on time and >15% under budget after takeover
- Restored stakeholder confidence
- Improved governance and delivery discipline
- Delivered a stable platform for future optimization
- Transition to Helm360's managed services support model



Leadership Perspectives

"We brought Helm360 in at a critical point when the programme needed clarity, ownership, and decisive leadership. Their structured approach, transparency, and deep 3E expertise quickly stabilised the project. Most importantly, they delivered on their commitments and helped us go live with confidence."

David Kinkead, CIO, Harneys

"Turnaround projects require more than technical skill. They require governance, honesty, and the ability to make tough prioritisation decisions with the client. With Harneys, our focus was on restoring control, simplifying where possible, and driving to a successful outcome. The collaboration and trust between teams made the difference."

Bim Dave, CEO, Helm360

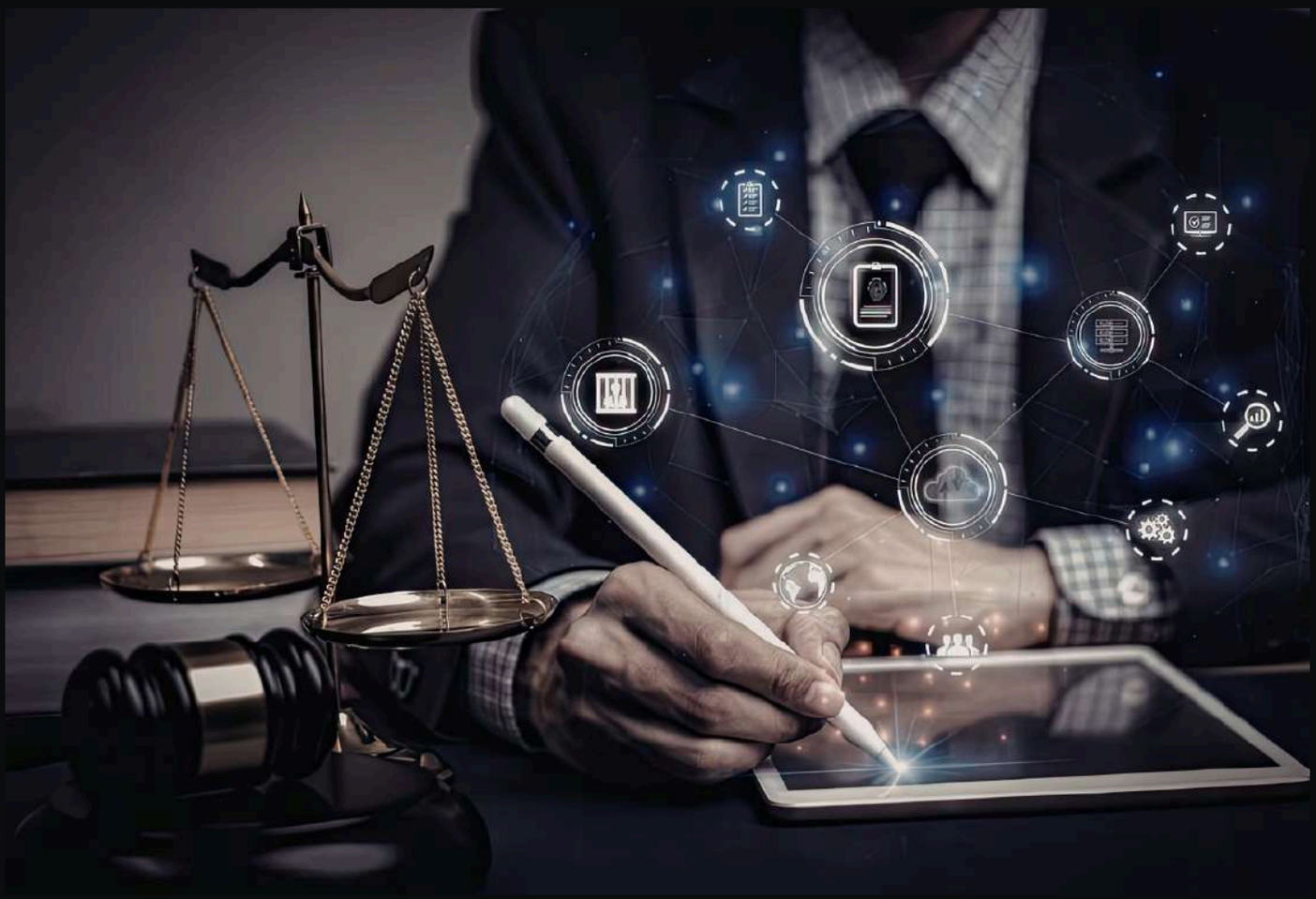
"Regaining stakeholder trust was critical to the success of this project. This was achieved by leveraging a high calibre team, working in true partnership with the client, ensuring every aspect of such a programme delivered exactly what was promised, when promised, whilst holding all parties to account"

Henry Piatek, VP of Professional Services, Helm360

Why This Matters

This engagement demonstrates Helm360's ability to step into challenged programmes, take full ownership, and deliver results.

Firms often encounter risk with multi-supplier models for core system change. Helm360's integrated delivery model, legal-sector expertise, and strong governance enable us to stabilise and recover complex programmes and see them through to success.



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