

CASE STUDY 03

When 2.76M Filipinos Are Counting on You, the System Has to Work

How a Philippine government social security institution built audit-ready project governance their members can trust.

ABOUT THE CLIENT (ANONYMIZED — STRICT NDA)

INDUSTRY	National social security and retirement benefits
TYPE	Government-Owned and Controlled Corporation (GOCC)
MEMBERS SERVED	1.7M+ active members; 2.76M+ total members and pensioners
EMPLOYEES	4,000+ across the country
FOOTPRINT	42 branches nationwide
ACTIVE PROJECTS	300+ enterprise initiatives every year
OVERSIGHT	Commission on Audit (COA), oversight commissions, Senate or Congressional inquiry, Philippine FOI (E.O. 2 s. 2016)
USE CASE	Enterprise PMO consolidation on ClickUp + BEACON

2.76M+ACTIVE MEMBERS &
PENSIONERS**4,000+**

EMPLOYEES NATIONWIDE

42

BRANCHES

300+

INITIATIVES PER YEAR

THE STORY

2.76 million Filipinos count on this Philippine GOCC for retirement, life insurance, and member loans. Across 42 branches and 4,000+ employees, the institution runs 300+ enterprise projects every year — every one of them potentially subject to a Commission on Audit (COA) examination, a Senate inquiry, or a Freedom of Information (FOI) request under Executive Order No. 2 s. 2016. In the private sector, missing a project document is inconvenient. In a GOCC holding the financial future of millions in trust, it's a governance failure that lands in the news. Project records were spread across spreadsheets, online forms, and decks. Audit evidence was reactive. Digibeacon brought the entire portfolio into one ClickUp

Workspace under BEACON. Today, the institution's project documentation is no longer a liability waiting for the next examination. It's infrastructure that outlives administrations.

BEFORE CLICKUP

When a pensioner walks into a branch in Davao, the experience they have was decided eighteen months earlier in a portfolio meeting in Pasay. That's the reality of running a GOCC at this scale: 300+ enterprise projects every year — technology modernization, member service enhancements, branch operations, compliance with new laws, digital transformation programs — each one eventually shaping a citizen interaction. The mandate is heavy. The execution standard has to match.

The PMO had the credentials. What it didn't have was the institutional infrastructure that would let those credentials matter at scale. Project files were scattered across disconnected systems. Status reports were reconstructed every reporting cycle. When COA called for an examination, evidence had to be assembled from spreadsheets and email archives, often weeks after the audit had begun. In a private company, that workflow is inefficient. In a GOCC where every project record is potentially Senate testimony or an FOI response, that workflow is exposure.

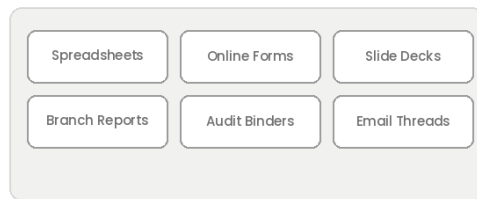
PUBLIC TRUST DEMANDS PUBLIC INFRASTRUCTURE.

GOCCs operate under accountability standards that private enterprises don't face: COA examination, oversight commissions, legislative inquiry, and Philippine FOI obligations. Here's where the legacy environment was failing each one:

Where	What It Looked Like	What Was Missing
Project Tools	Different stack per project — spreadsheets, forms, decks	No single source of truth
Status Reports	Decks built by hand for every oversight cycle	No live exec Dashboard
Project Intake	New requests scattered across departments	No standard intake
Audit Readiness	Evidence assembled when examiners came calling	No always-on documentation
Branch Reporting	42 branches each reporting their own way	No unified field reporting
Stakeholder View	Each oversight body got a custom-built artifact	No role-based portfolio view
Inter-Agency	Coordination by email and meetings	No traceable inter-agency records

BEFORE

Work Sprawl



6+ disconnected systems per project

AFTER

Unified Command Center



One system of record. Continuous evidence.

WHAT WAS AT STAKE

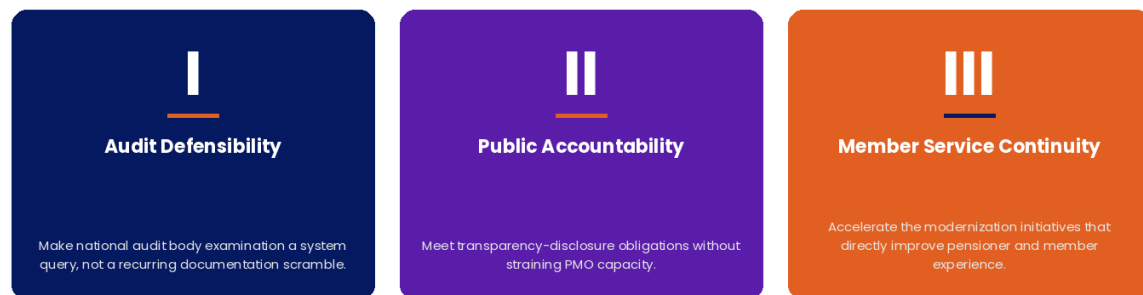
- 1. COA findings travel further than they used to.** An adverse Commission on Audit finding doesn't stay private. It surfaces in news coverage, in legislative debate, in social media discourse — and stays attached to leadership for years. Reactive evidence assembly produces findings nobody can defend in a Senate hearing.
- 2. A subpoena arrives with 48 hours' notice.** When a House or Senate committee schedules a hearing, the institution has days, sometimes hours, to produce structured project documentation. Manual artifact assembly cannot meet that timeline at the scale of 300+ active projects — and unpreparedness becomes its own political event.
- 3. Pensioners feel the operational delays first.** When a modernization project slips, the pensioner waiting in line at a branch in Cebu feels it first — in slower benefit processing, in older systems failing at the counter. A humanitarian risk wearing an operational disguise.
- 4. Public trust erodes in headline cycles.** A visible execution failure becomes a news story. The story spreads on social media. The sentiment becomes a reputational problem. The compounding is faster than any administration's term in office.
- 5. FOI requests arrive without a system to answer.** The Philippine FOI Order requires structured records produced within statutory timelines. The legacy environment couldn't meet those timelines. Each missed deadline is a separate governance event.
- 6. Each new administration starts from zero.** Without infrastructure that outlasts leadership transitions, every incoming GOCC president loses three years of operational context the morning after their oath-taking. Vendor relationships and project decisions get re-litigated from scratch.

HOW WE GOT THEM THERE — BEACON IN SIX PHASES

BEACON is our six-phase methodology for ClickUp implementations. It's the framework that makes the change stick after the platform is live.

BLUEPRINT	ENGINEER	ACTIVATE	CALIBRATE	OPTIMIZE	NURTURE
Mapped 10 project archetypes across the institution's mandate — each tagged for COA evidence.	Configured ClickUp Workspace with GOCC-grade governance: role-based access, full audit trail.	Migrated 300+ active projects in 6 branch-coordinated waves — zero member-service disruption.	Stood up four audience-specific Dashboards: executive, branch, internal audit, legislative liaison.	Automated reporting aligned to COA, oversight, and FOI statutory timelines — zero manual aggregation.	Embedded discipline through Digibeacon's Strategic Change Partner — governance locked, CoE staffed.

INVESTMENT RATIONALE — THREE PILLARS



WHAT CHANGED

- 300+ projects now run on one institutional record — with answers consistent across COA, oversight commissions, legislative inquiries, and FOI requests.
- Audit evidence generated continuously as projects run — documentation already in COA's required format when examiners arrive, with timestamps that hold up in a Senate hearing.
- Four audience-specific Dashboards now serve every oversight stakeholder: executive, branch operations, internal audit, and legislative liaison — each scoped to permitted view.
- Standard intake and stage-gate governance now applies to all 300+ projects across all 42 branches — making branch-level work institutionally visible for the first time.
- Governance infrastructure now outlasts any single administration — institutional memory, vendor records, and project decisions persist through transitions.

“When 2.76 million Filipinos are counting on you, the system you run on has to be worth their trust.”

Great platforms don't transform organizations. The work people do with them does.

Digibeacon is the team that does that work alongside you.



Talk to us about your transformation.

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SCAN ME