CASE STUDY 01

How a Top-15 Philippine Bank Got Its Mondays Back

300+ projects. 8,000+ people. Zero single source of truth — until ClickUp.

ABOUT THE CLIENT (ANONYMIZED — STRICT NDA)

INDUSTRY	Universal Banking — retail, commercial, corporate
COUNTRY	Philippines
SIZE	Top-15 by total assets in the Philippine market
FOOTPRINT	500+ branches nationwide — a top-5 retail network
EMPLOYEES	8,000+ across the country
ACTIVE PROJECTS	300+ enterprise initiatives every year
REGULATOR	Bangko Sentral ng Pilipinas (BSP)
USE CASE	Enterprise PMO consolidation on ClickUp + BEACON

8,000+	500+	300+	6+
EMPLOYEES NATIONWIDE	BRANCHES	INITIATIVES PER YEAR	DISCONNECTED TOOLS PER PROJECT

THE STORY

It's 7pm on a Sunday. Three senior PMPs at one of the Philippines' top-15 universal banks are still in the office, rebuilding the same Monday-morning portfolio deck they rebuild every week. They have the credentials. They have the talent. What they don't have is a system. The bank runs 300+ enterprise projects at any given moment — core banking upgrades, BSP compliance programs, branch transformation, customer experience launches — and every one of them lives in a different mix of spreadsheets, MS Project files, SharePoint folders, RAID logs, and email threads. Six tools per project. Zero source of truth. Digibeacon consolidated everything into one ClickUp Workspace and used the BEACON methodology to make the change permanent. Today the deck builds itself.

BEFORE CLICKUP

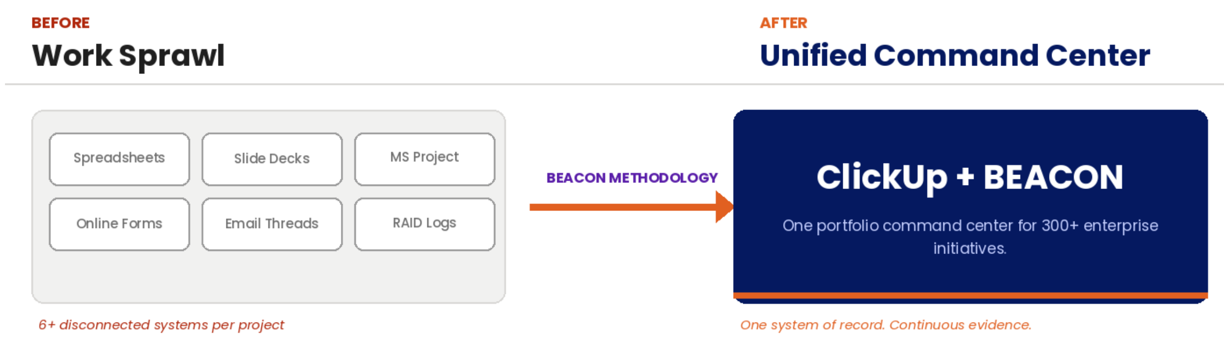
Top-15 universal banks in the Philippines don't get to coast. Digital-only challengers ship features in weeks. Regional peers scale across markets. Standing still loses ground. Which is why this bank runs a portfolio of 300+ enterprise projects at any given moment — core banking modernization, regulatory compliance programs mandated by Bangko Sentral ng Pilipinas (BSP), retail product launches, branch transformation, technology platform upgrades, customer experience initiatives. The pace is the pace.

The constraint wasn't the people. The bank's PMO was certified, experienced, and capable. The constraint was that 300+ projects were being run on tooling designed for 30. Charters in Word. Schedules in MS Project or Excel. Status reports rebuilt manually in PowerPoint every reporting cycle. Intake requests coming in by online form, by email, by Viber, sometimes by walk-in. RAID logs in detached spreadsheets. Six tools per project, zero of them talking to each other. The PMO's most senior people were spending their best hours formatting slides instead of running the portfolio.

SIX TOOLS PER PROJECT. NONE OF THEM TALKED TO EACH OTHER.

Every initiative in the bank lived across a different mix of spreadsheets, decks, and disconnected systems. Here's the pattern we found in every project we audited:

Where	What It Looked Like	What Was Missing
Tools	6+ different systems per project	No single source of truth
Status Reporting	Decks rebuilt by hand every Monday morning	No live executive Dashboard
Project Intake	Requests came in by email, by form, by Viber, by walk-in	No standard way to log a new project
Resource View	Nobody knew who was on which project	No portfolio resource model
Stage-Gates	Reviews put together ad hoc, project by project	No consistent governance flow
RAID & Risk	Risks tracked in scattered spreadsheets	No portfolio-level risk view
Audit Evidence	Pulled together in panic when BSP came knocking	No always-on audit trail



WHAT WAS AT STAKE

1. **BSP audits become weekend events.** Tightening BSP supervisory expectations on operational risk and project governance mean evidence has to be ready, not assembled. Pulling proof from six different systems on a Friday afternoon when supervisors arrive Monday morning is brittle, slow, and discoverable.

2. **The challenger banks ship faster.** Digital-only banks compress feature launches to weeks. When the bank's portfolio status is opaque, course-corrections happen one reporting cycle too late — and customers move with them. Speed isn't a luxury anymore; it's table stakes.

3. **The PMP team is one offer away from leaving.** Senior PMP-certified professionals spending 30–40% of their week formatting slides isn't just an economic inefficiency. It's a retention crisis. People with their credentials get recruited weekly. They stay where the work is real.

4. **Capital flows to the wrong projects.** Without a portfolio-level resource view, projects compete for budget and headcount on incomplete information. Approved priorities stall while quieter, lower-impact work eats the team's capacity. Strategy becomes whatever happens to be visible that month.

5. **The wrong version reaches the board.** When project artifacts live across SharePoint, finance spreadsheets, and PMO drives — each with its own permissioning rules — version control fails. The day it fails in front of the board, or worse, in front of an examiner, the cost isn't documentary. It's reputational.

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 12 distinct project archetypes — from BSP regulatory programs to branch transformation — against the existing 6+ tools per project.	Configured a single ClickUp Workspace: standardized intake form, stage-gate Statuses, RAID Custom Fields, capacity model with workload view.	Migrated the 300+ live portfolio in 4 waves over 8 weeks — zero project paused, zero data lost.	Built executive Dashboards pulling live portfolio health, stage-gate progress, and resource utilization — the deck that used to take 4 hours every Sunday.	Automated weekly status pulls, escalation alerts, and stage-gate notifications — cutting manual reporting work by an estimated 25–30 hours per week.	Stood up the bank's internal Center of Excellence — governance cadence, ClickUp expert bench, ongoing optimization rhythm.

INVESTMENT RATIONALE — THREE PILLARS

I
PMO Productivity Recovery
Reclaim 30–40% of senior PMP capacity currently consumed by manual artifact assembly.

II
Decision Velocity
Compress the lag between issue emergence and executive visibility from weeks to hours.

III
Audit-Readiness
Convert project documentation from a recurring scramble into continuous, system-generated evidence.

WHAT CHANGED

- The Sunday-night deck assembly is gone. Leadership opens one ClickUp Dashboard; the portfolio is already current.
- 300+ projects now run on the same stage-gate workflow — from intake through close-out, with no exceptions and no side-door initiatives.
- An estimated 25–30 hours per week of manual reporting work returned to the PMO — redirected to running the portfolio, not formatting slides.
- Standardized intake replaced four parallel channels (email, online form, Viber, walk-in). Every project now enters through one front door.
- Resource utilization is visible across the portfolio for the first time — the PMO can finally answer who is working on what.
- BSP examination evidence is generated continuously, not assembled. When supervisors arrive, the documentation is already in the system.

"ClickUp ended the work sprawl. BEACON made the change permanent."

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

Digibeacon is the team that does that work alongside you.

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Talk to us about your transformation.

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SCAN ME