

CASE STUDY

HRIS transition & multi-stream operational overhaul

Illumyn Impact · Oakland, CA · 2024 – Present

Change Management	HRIS / PEO Migration	CRM Implementation	Nonprofit Operations
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SITUATION

Illumyn Impact, a mission-driven nonprofit, had outgrown its existing HR and payroll infrastructure. The organization’s existing HRIS and payroll system was labor-intensive, poorly suited to the complexity of managing both domestic and international staff, and unable to provide the benefits administration and support the team needed. Leadership identified the transition to a Professional Employer Organization (PEO) as the right path forward — one that would consolidate payroll, medical benefits, and international staffing support into a single, scalable solution.

At the same time, the organization faced a cluster of simultaneous operational needs: a new CRM implementation, procurement administrative support, required nonprofit business insurance renewals, and an overdue staff performance review cycle. The COO needed a trusted operational partner who could manage all of these work streams in parallel without disrupting day-to-day operations.

APPROACH

Jacqueline was engaged directly by the COO to lead the change management cycle and provide hands-on operational support across all active work streams. Working as a two-person team, she focused on ensuring a smooth, low-disruption transition while building the organizational infrastructure the nonprofit needed to operate with greater efficiency and confidence.

HRIS & PEO migration	Led the transition from the legacy HRIS and payroll system to a full-service PEO, covering payroll processing, medical benefits administration, and international staffing protocols. Provided business procedure recommendations for out-of-state and international employees — a scope that required rapid ramp-up on cross-jurisdictional compliance requirements.
CRM implementation	Managed the selection, configuration, and rollout of a new CRM system to support the organization’s stakeholder and donor relationship management. Coordinated staff onboarding to ensure adoption from day one.

Operations & compliance

Provided procurement administrative support, coordinated required nonprofit business insurance renewals, and managed the staff performance review cycle — ensuring that compliance and people operations remained on track throughout the transition period.

“The simultaneous nature of the work streams was the real challenge. A PEO migration alone demands full attention — running it alongside a CRM rollout, insurance renewals, and a performance cycle requires airtight prioritization and a COO who trusts you to manage the sequencing.”

RESULTS

4

simultaneous work streams managed

2

person team: COO + Jacqueline

Live

all systems operational as of today

The PEO transition completed smoothly with no disruption to payroll, benefits, or staffing operations. The new system is fully live and in active use, providing the organization with the scalable HR infrastructure it needs to support both domestic and international staff going forward. All four concurrent work streams — HRIS migration, CRM rollout, insurance compliance, and staff reviews — were delivered without overlap or delay.

The engagement reflects Jacqueline’s core value proposition as a fractional COO and operations consultant: the ability to step into a complex, multi-threaded operational environment, establish trust quickly, and deliver across all streams simultaneously — without requiring a large team to do it.

KEY TAKEAWAYS

- HRIS and PEO migrations carry significant employee trust implications — clear communication and careful sequencing are as important as the technical transition
- Fractional COO support is most valuable when an organization faces multiple simultaneous operational needs that exceed internal bandwidth
- Out-of-state and international staffing adds compliance complexity that requires rapid, research-driven ramp-up — not just process replication
- Running a staff review cycle during a system transition requires deliberate separation of workstreams to protect employee experience

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