

Washington State Employees Credit Union Relies on @task for Project Portfolio Transparency, Accuracy, and Accountability



WSECU

WASHINGTON STATE EMPLOYEES
CREDIT UNION

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— Keenan Wagner
Director of IT, WSECU

Solution Snapshot

- Washington State Employees Credit Union (WSECU), a nonprofit financial cooperative, needed a solution that would provide a centralized location for managing projects in a growing portfolio
- WSECU wanted real-time visibility into project status, a way to maximize IT resources, and the ability to manage projects against a set of metrics
- @task provided WSECU with the means to manage their portfolio, provide management with accurate status updates, and an intuitive user interface that lead to acceptance by all team members
- WSECU is seeing positive results from @task use, and plans to roll the solution out to additional departments

Background

Established in 1957 by 40 founding Washington State employees committed to the simple concept of people helping people, the Washington State Employees Credit Union (WSECU) is a nonprofit financial cooperative that offers financial products and services to members. One of WSECU's primary goals is providing greater access to traditional financial services for more people; to that end they have linked with the shared branching network to give members account access at 2,500+ branches in 45 states, Puerto Rico, Japan, South Korea, Germany, Guam, and Italy.

WSECU is a nonprofit financial cooperative that offers financial products and services to its members.

The Challenge

WSECU had been using Microsoft® Excel® to manage projects, but was not able to manage resources or their project portfolio efficiently. They needed a tool that would provide them with a centralized location for managing tasks and issues associated with their growing portfolio of IT projects. Specific requirements included:

1. Real-time visibility into the status of individual projects in the WSECU portfolio
2. The means to maximize IT resources, including an easy-to-use interface that could be used in departments other than IT
3. The ability to score and manage projects against performance metrics, a difficult and time-consuming process using existing tools

The Solution

The @task solution provided WSECU with the tools they needed to succeed. @task notifications and status indicators provide an easy way to view project status at a glance, as well as:

Manage the Project Portfolio—@task provides a centralized location and added transparency for managing the credit union's project portfolio. "Everyone else [other PPM solutions reviewed in WSECU's selection process] needed six weeks to configure the reports we wanted," said Keenan Wagner, Director of IT for WSECU. "Right out of the box, @task provided reporting that allowed us to get to market six weeks sooner than the other solutions we considered."

Easy to Use—@task offered WSECU the most intuitive user interface, leading to the level of easy-to-use they were searching for and insuring the solution would be (and is) "...very well accepted by all the members of our team." (Keenan Wagner)

Status Updates—@task's notification and status indicators provided the WSECU team

Company Snapshot



- WSECU was established in 1957 by 40 founding Washington State employees committed to the simple concept of people helping people
- One of WSECU's primary goals is providing greater access to traditional financial services for more people
- The credit union is linked with the shared branching network to give members account access at 2,500+ branches in 45 states, Puerto Rico, Japan, South Korea, Germany, Guam, and Italy
- WSECU relies on @task for complete project portfolio transparency, accountability, and updated project information

members with an easy way to view project status at a glance. Other solutions required manual updates to indicate status - @task automatically updates status indicators every time a project team member updates task status.

Results

Project managers, developers, and analysts at WSECU are currently using @task, with plans to roll the solution out to other departments over time. Senior management reports, which previously required a day and a half to prepare, can now be accessed immediately from a dashboard, reviewed in minutes, and prepared for general presentation in less than an hour.

Reports can be accessed immediately, reviewed in minutes, and prepared for presentation in less than an hour.

WSECU relies on @task for complete project portfolio transparency, accountability at every level of the project, and real-time access to accurate and up-to-date project information.