

Innovative-e and CFCU: Building the Future of Project Management—Natively on Microsoft



Customer Overview

Wright Patman Congressional Federal Credit Union (CFCU) is a mission-driven financial institution serving employees of the U.S. Congress and their families. As a credit union, CFCU operates with a commitment to community, security, and responsible growth—making efficient project execution and strategic alignment vital to delivering on its promises.

In 2025, CFCU launched a strategic initiative to transform how project work is managed, prioritized, and aligned to business goals—moving away from scattered spreadsheets, emails, and informal processes toward a unified, structured, scalable platform built on Microsoft 365.

Our History with CIO Chris Harrington

Innovative-e’s partnership with CFCU began with a familiar handshake. Chief Innovation Officer Chris Harrington had previously brought Innovative-e into two other organizations across his career—and once again, he turned to us to lead the transformation.

From his earliest leadership roles to his current position at CFCU, Chris has consistently sought a partner that understands both the platform and the people—someone who can architect real change, not just implement software.

This enduring relationship reflects the kind of partnership we strive to build: grounded in trust, proven through delivery, and aligned to shared values—performance, clarity, and happier teams.

Customer Challenge

CFCU’s teams were collaborating daily in Microsoft Teams, but project intake, prioritization, and reporting remained fragmented and there was no centralized process for selecting or governing projects. Smartsheet was used externally by vendors, but it wasn’t fully integrated. There was no consistent method for evaluating which initiatives aligned with the organization’s goals—and no visibility into where time, effort, or value were going.

Chris Harrington saw a clear opportunity to unify strategy, execution, and outcomes—all within the Microsoft Cloud.

CFCU Needed:



A structured intake process with transparent prioritization



Better governance and project workspace consistency



Visibility into strategic alignment and portfolio health



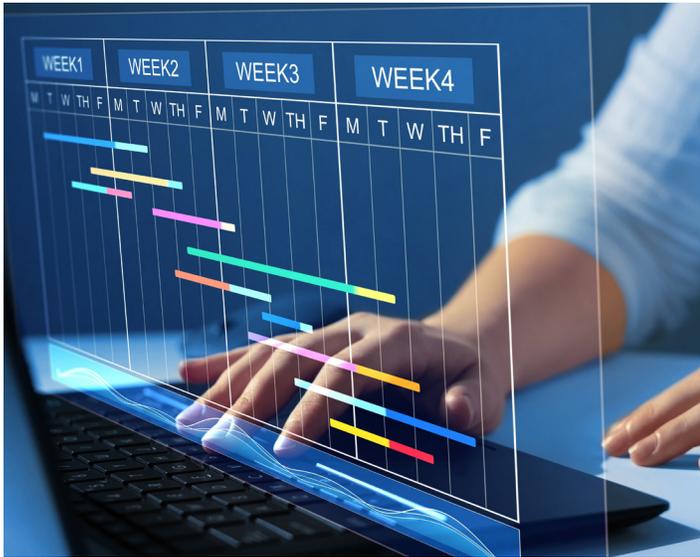
A way to evolve their work management platform over time, not all at once

“They had aspirations of being able to see data on demand and make informed prioritization and selection decisions on project intake.”

— Clint Pittman, Sr. Director, Innovative-e

The Opportunity: Native, Scalable, and Strategic

This was not a migration from legacy tools—it was a native Microsoft build, designed from the ground up. The goal: create a governed, scalable solution that democratizes project visibility while aligning work to strategic goals. With a focus on usability and adoption, the approach prioritized long-term value over short-term workarounds—bringing platform-first strategy to life.



Solution

To address these challenges, CFCU partnered with Innovative-e to implement Teams4PM, a Power Platform-based solution that connects directly to Planner Premium for project scheduling and integrated directly into Microsoft Teams—standardizing how project work is submitted, scored, approved, and delivered.

“We want to get something in quickly, then evolve from there. This gives us the structure to manage enterprise-level initiatives.”

— Chris Harrington, CIO, CFCU

Key Solution Components:

Teams4PM Implementation

in both development and production environments, hosted in CFCU’s Microsoft tenant

Planner Premium Integration

for governed execution, schedule consistency, and alignment with Microsoft-native tools

Goal-Based Intake Workflow

that allows requests to be scored, ranked, and approved based on weighted organizational priorities

Smartsheet Integration

for collaboration on key large scale vendor-led initiatives

Dashboards and Reporting

via Power BI and out-of-the-box analytics to drive leadership visibility and real-time decision-making across departments

Training, Hypercare & Roadmap

including structured onboarding, office hours, and development of a strategic roadmap for Value Point Projects and future AI expansion

“They’re using Teams4PM and the platform as a construct to build their PPM—not the other way around. It’s an on-ramp for how they want to work going forward.”

— Mike Taylor, CEO , Innovative-e

Business Impact

Still in early phases, CFCU's Teams4PM implementation is already delivering meaningful gains in structure, transparency, and alignment. The solution has provided a scalable foundation for strategic project intake, stakeholder engagement, and future growth.

Operational Gains

- Centralized intake process with goal-based scoring
- Unified Teams-based workspaces for project execution
- Reduction of redundant tools and improved platform governance
- Strategic alignment baked into every project decision
- Reduced dependency on email, spreadsheets, and Smartsheet
- Out-of-the-box dashboards provide Greater visibility for IT and executive leadership

More importantly, the effort has laid the groundwork for a culture of accountability and alignment—where strategy drives execution, and execution is visible at every level.

This structured foundation enables CFCU to evolve and grow—with built-in flexibility for Value Point Projects and Copilot innovation in the future.

Team Enablement

One of the most meaningful outcomes of the Teams4PM rollout at CFCU has been the enablement of internal teams—from IT administrators to business stakeholders and emerging project managers. By combining structured training, goal-driven intake, and platform governance, the initiative has begun shifting how teams across the organization engage with project work.

Highlights

- **Faster Ramp-Up for PMs and Business Owners**
New and existing team members now have access to structured templates, workflows, and dashboards—eliminating the guesswork and reducing reliance on tribal knowledge or shadow tools.
- **Greater Ownership and Accountability**
With clear intake scoring, project visibility, and consistent reporting, business owners feel more empowered to drive their initiatives while staying aligned with organizational priorities.
- **Core Team Confidence**
CFCU's core team—and supported by analysts and innovation leaders has fully adopted the Teams4PM framework and is actively managing intake, review, and configuration.
- **Training + Hypercare Support**
Focused training sessions for PMs, admins, and project stakeholders. A one-week hypercare period with open office hours ensured adoption stuck beyond go-live.
- **Unified Collaboration in Microsoft Teams**
By centralizing project collaboration in Teams, CFCU has created a familiar, secure space where cross-functional contributors can engage without learning new tools or duplicating communication.

"We're looking forward to getting something in as quick as you can... We want to get our enterprise projects into a standard format."

— Chris Harrington, CIO, CFCU

What's Next?

With Teams4PM now in place, CFCU and Innovative-e are already exploring the next phase of transformation:

Next steps in CFCU's modernization journey include:

- **Copilot Integration** for project summaries, intake form optimization, and leadership briefings
- **AI-Powered Insights** to track portfolio performance and forecast delivery outcomes
- **Broader Governance Models** that scale project execution across departments
- **Additional Value Point Projects (VPPs)** aligned to CFCU's strategic roadmap

CFCU's modernization journey isn't just about a platform rollout—it's a reflection of what's possible when long-term relationships, a Microsoft-first vision, and human-centered design come together. CFCU is building not just better processes, but a better way to work.

"We're creating a new rhythm for how work moves through the organization. The transparency, structure, and support we now have is making everyone more confident."

— Chris Harrington, CIO, CFCU