



## PRODUCTS

# Leveraging the Microsoft Platform and Teams4PM for Data Driven Decisions

## INTRODUCTION

Carolinas Telco Federal Credit Union (CTFCU) has been serving members across the Carolinas since 1934. They offer credit union services to the following groups: Those employed with or retired from one of our current preferred business partners, Members of the NC Consumer Council (NCC) or other approved associations, Individuals who live, work, worship, or attend school in select areas of Mecklenburg County or Wake County, deemed underserved for financial services by the National Credit Union Administration (NCUA).

## CUSTOMER CHALLENGE

Carolinas Telco wanted to increase its focus on their customer-facing solutions, and in doing so, identified that they also needed to include internal services. When Carolinas Telco first started their own internal project management department about six years ago, they began using a third-party web-based solution that essentially functioned as a task manager.

As their organization has grown, their projects have become more complex. Carolinas Telco encountered cases where the third-party solution wasn't working, requiring them to create manual workarounds. They also faced challenges with the solution being a disassociated third-party system, where their data was stored elsewhere, so it was difficult for them to get critical visibility into project status.

## SOLUTION

There was a need to put something more cohesive into place than the third-party application they had used previously. Carolinas Telco engaged Innovative-e and discovered the Teams4PM solution, recognizing that they could leverage the collaboration that comes inherently with Microsoft Teams, with Teams serving and being integrated directly within Teams4PM.

**“ Teams4PM ... does a great job of bundling different Microsoft applications into one cohesive package and allows us to collaborate using the native tools of Microsoft Teams for creating more efficient projects. ”**

## TEAMS4PM

Innovative-e takes your most important and complex projects and makes sense of them through consistent and predictable access to information, real-time reporting, and data-drive insights. Enabling collaboration and encouraging knowledge-sharing promotes an inclusive and unified environment that accomplishes more.

Whether it's your most strategic and complex projects or smaller, less formal work, Teams4PM helps make sense of all with consistent experiences, unified data, and derivative insights. You can more accurately and intelligently allocate your people and resources to efficiently maximize your return on effort. Access the information your organization needs to move your most crucial projects to the center. where they can carve a path to a better future.

Teams4PM helps organizations take their uncategorized work and project management data and centralize it on a secure and reliable cloud platform. Functions such as tagging and reporting for project management roles help structure data across the organization. The outcome is a reduction in inefficiencies and time wasted searching for business-critical information

## RESULTS

Teams4PM streamlined Carolinas Telco's communication and collaboration within their project team, as well as for their stakeholders for projects.

Carolinas Telco finds it useful that data now is within Microsoft's Secure Cloud, so not only can they see more information related to their projects than they could before, they're also able to leverage that data in other ways and connect to it from different systems. This means they now have more transparency, enabling them to identify issues and risks more effectively.

Another key benefit is that Carolinas Telco are able now to create a better single source of truth with their project data, whereas before their data came from multiple disparate sources, often without context. Carolina's Telco often spent time "reinventing the wheel" and duplicating efforts in their projects. Now they have implemented "a great solution that enables us to have consistent data that can be referenced by leveraging Microsoft 365 and the Power Platform, in many different ways."

## CONCLUSION

The Teams4PM solution bundles Microsoft applications into one cohesive package and is enabling Carolinas Telco to take advantage of Microsoft 365 to leverage the customization that is available within the platform. Because of this, collaboration using the native tools of Microsoft Teams for creating more efficient projects.

One of the main benefits from the Teams4PM solution is the data available, now from a single source of truth, which is enabling Carolinas Telco's stakeholders to have a better understanding and context and empowers them to make the best decisions.

### CUSTOMER QUOTE

"By leveraging Teams4PM, we're not chasing data, which is critically important. That enables better business agility and it enables the business to make quicker decisions, leveraging data, facts, and figures.

**-Greg Young**  
**VP of Strategic Projects**  
**at Carolinas Telco Federal Credit Union**