



PRODUCTS

How an Out-of-the-Box Solution Enhances Data and Drives Better Decision Making

INTRODUCTION

Sharonview Federal Credit Union is a highly ranked credit union known for its outstanding personal service, competitive pricing, and dedication to being the premier financial service provider across 18 branch locations in North and South Carolina.

CUSTOMER CHALLENGE

Like many organizations experiencing growth, Sharonview suffered from departmental silos, which created challenges with communication and standardization. To remedy these problems, Sharonview formed an Operational Excellence team to create a project management process. The initial focus was on the process itself, not the technology or toolset. As a result, the team used whatever existing toolsets were already available. Over time, the homegrown technology approach grew inefficient and caused process bottlenecks.

Additionally, the project and approval process focused mostly on execution with limited focus on planning. Business cases were developed only for major organization-wide projects resulting in limited visibility, reduced collaboration, and less accountability for smaller projects. Department leaders were asked to evaluate the ability to provide resources for a project without an understanding of what would be required. Limited visibility into a project's resource needs and goals led to longer, less efficient project execution. It was clear that better technology toolsets designed for project management were going to be needed.

In early, 2021, Sharonview's PMO evaluated the current project management process and discussed end-state goals with leaders. "We knew we needed more focus on developing a complete business case and creating a proper plan prior to execution," said Rosalyn Hudson, Director of Lending

SOLUTION

Sharonview had a vision for what they wanted from a modern project management toolset. The Project management and Integration teams turned to Sharonview Information Technology leadership, who recommended working with CDW, a trusted technology partner. CDW leveraged its strategic partner network and brought in Innovative-e, a Microsoft Gold Partner whose proven approach to solving work management challenges made it a 2021 finalist for Microsoft Project & Portfolio Management Partner of the Year. Because the CDW relationship was already in place, the contracting process was streamlined and Innovative-e quickly began an assessment. Advanced Technology Account Executive at CDW, Greg Mitchell said, "We were thrilled Sharonview came to us on this key initiative. After hearing what outcomes Sharonview was looking for, we knew Innovative-e was the partner to turn to and provide Sharonview with expertise required for a successful engagement."

EDISON365

edison365 is an end-to-end project management platform that collects innovative ideas from employees within an organization, assesses their value, then turns those ideas into reality. Built to extend the capabilities of Microsoft 365, the edison365 suite includes three products: edison365ideas, edison365businesscase, and edison365projects. “For edison365 it is a real pleasure to support knowledgeable partners like Innovative-e. Bringing combined software service and deployment value as a team has helped Sharonview accelerate time to value,” said Tad Haas, Executive Vice President of edison365.

After viewing an in-depth demo, Sharonview contracted Innovative-e to implement the full edison365 product suite and roll it out in phases, ensuring maximum positive business impact in the short term and a high adoption rate in the long term. Sharonview began design, roll out and training in phases by module, beginning with edison365ideas in June 2021, edison365businesscase in July 2021 and

CONCLUSION

Today, the new project management processes brought to life by edison365 and Innovative-e have become standard within Sharonview. The toolset has helped business case owners choose the most strategic projects, execute them efficiently, and produce the intended results. edison365 encourages and facilitates active collaboration, keeping everyone accountable and providing the most up-to-date information. The new processes enabled in edison365 have resulted in more timely project deliveries, a better grip on resource management and more accurate project budgeting.

KEY STATS

Ideation

58 ideas Submitted
8 became a business case

Business Case

65 business cases created
40 approved

RESULTS

What Sharonview loves the most about edison365 is the out-of-the-box user interface (UI). For high-usage teams, the simplicity and usability of the UI enabled even non-professional project managers the opportunity to manage a project successfully. Moreover, the ability to easily configure the software and customize reporting meant Sharonview could continue to maximize organizational adoption and adjust based on feedback. This higher level of adoption allowed and continues to allow Sharonview to collect data collaboratively throughout the organization.

Better data drives better decision making. edison365’s reporting capabilities leverage Microsoft PowerBI, providing details on resource usage, costs, and benefits. This facilitates the robust conversations needed to generate well-informed decisions. The ability to capture a detailed business case through workflow allows the Sharonview executive team to efficiently and effectively determine which projects to prioritize based on strategic alignment to goals, as well as

CUSTOMER QUOTE

“We are now in a really good place where our executives...have the ability to make decisions on accurate data collaborated on by the whole organization.”

- Rosalyn Hudson, Director of Lending Partnerships at Sharonview

Project

28 projects completed

- **3** Major
- **3** Minor
- **2** Branch Builds
- **20** Teams Projects