

Company | **Washington State Employees Credit Union**

Washington State Employees Credit Union (WSECU) is a nonprofit financial cooperative offering financial products and services to members.

The Business Problem

Using Microsoft Excel, WSECU wasn't able to manage resources or their project portfolio effectively. They were looking for a tool that would provide a centralized location for managing tasks and issues associated with their portfolio of IT projects.

The ability to score and manage projects against performance metrics was a difficult and time-consuming process. WSECU was looking for a solution that allowed them to view project status of individual projects in the portfolio in real time.

They were also looking for a solution to maximize their IT resources that included an easy-to-use interface that could also be used in other departments outside of IT.

The Solution

@task proved to be the best solution for WSECU. @task provided a centralized location and more transparency for managing the credit union's project portfolio right out of the box. "Everyone else 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 quicker than the other solutions we considered."

"Ease of use was a major consideration for us," said Wagner. "@task offered the most intuitive user interface, and is very well accepted by all the members of our team."

The Result

@task's notifications and status indicators provided an easy way to view project status at a glance. The other tools that offered status indicators required the project manager to manually indicate status—@task automatically updated status indicators every time a project team member updated task status.

Currently, project managers, developers, and analysts are using @task with plans to roll out to other departments. Senior Management reports, that previously took a day and a half to compile and prepare, are now available immediately from a dashboard, reviewed in minutes, and prepared for presentation in under an hour.

The bottom-line benefits to WSECU include complete project portfolio transparency, accountability at every level of the project, and real-time access to accurate and up-to-date project information.

How WSECU Achieved the Results

Utilizing @task's coaching and Boot Camp training, WSECU was able to input projects in the system and start successfully using @task within the first month.

"We kind of jumped right in and started inputting project data from day one," says Wagner. "We used the coaching for question and answer sessions and felt like the @task Client Services people were very responsive to our needs."

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—Keenan Wagner
Director of IT
Washington State Credit Union