

CASE STUDY

CAROLINAS TELCO FEDERAL CREDIT UNION

Leveraging the Microsoft Platform and
Teams4PM for Data Driven Decisions



SUMMARY

Carolinas Telco Federal Credit Union (CTFCU), sought to modernize its project management systems to align with customer and internal services.

To tackle their growing project management headaches, Carolinas Telco explored options and landed on Teams4PM through Teams4PM's Partner, Innovative-e. They wanted more than just another tool; they needed a unified setup that would make collaboration easier and bring all their project info under one roof. No more jumping between scattered apps—just one place to keep projects on track and decisions crystal clear.

By adopting Teams4PM, this shift from legacy systems to AI-powered tools positions Carolina Telco at the forefront of credit union services, allowing them to adapt to evolving challenges and opportunities.



TEAMS4PM CUSTOMER BANKING INDUSTRY



Carolinas Telco Federal Credit Union has been serving members across the Carolinas since 1934. They offer credit union services to various groups including employees and retirees of preferred business partners, members of the NC Consumer Council, and individuals in select underserved areas.



Teams4PM has completely streamlined our communication and collaboration, both inside the project team and with every stakeholder. Plus, syncing with Microsoft Teams and our other tools just works, making project management smoother and more reliable.

CHRIS HARRINGTON

CTO at Carolinas Telco Federal Credit Union

MICROSOFT PARTNER

Innovative-e, a trusted Teams4PM partner, is a leader in modernizing project

management with Microsoft's cutting-edge

technologies. As a long-standing Microsoft partner and multiple-time

Microsoft Partner of the Year awardee, they bring deep expertise in

optimizing project and portfolio management.



In collaboration with Carolinas Telco, Innovative-e leveraged Microsoft Power Platform, and Teams4PM to transform their project management approach—eliminating inefficiencies, improving reporting accuracy, and driving organizational adaptability.



CHALLENGES

Carolinas Telco wanted to put more focus on improving customer experience, which resulted in taking a closer look at internal services, too.

When they first launched their internal project management team, they started with a simple third-party task management tool. It worked well at first, but as the organization grew, so did the demands of their projects.

Carolinas Telco encountered cases where the third-party solution wasn't working, requiring them to create manual workarounds. Their current system faced many other obstacles, such as:

- ▶ Created **data silos**
- ▶ **Lacked integration** with Microsoft tools
- ▶ Required inefficient **manual workarounds**
- ▶ Offered **limited visibility** into project statuses

Getting a full picture of project health started to feel more like an investigation than insight—complete with chasing down updates, decoding spreadsheets, and following the trail of scattered documents.



SOLUTIONS

To tackle their growing project management headaches, Carolinas Telco explored options and landed on Teams4PM.

They wanted more than just another tool; they needed a unified setup that would make collaboration easier and bring all their project info under one roof.

No more jumping between scattered apps —just one place to keep projects on track and decisions crystal clear.

- ▶ Centralize project data in Microsoft's secure cloud
- ▶ Combine tools like Power Platform, Teams, and Microsoft 365 into a cohesive system
- ▶ Reduce duplicative work and manual effort
- ▶ Enable real-time collaboration and transparent reporting
- ▶ Provide a single source of truth for project data



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

GREG YOUNG

VP of Strategic Projects at Carolinas Telco Federal Credit Union

RESULTS

Once Carolinas Telco rolled out Teams4PM alongside the Microsoft Platform, everything came together.

Team is never stuck forcing a one-size-fits-all solution. Whether it's Microsoft Teams, Teams4PM, or another Microsoft 365 tool, everyone gets what works best for their role.

Microsoft Teams was already second nature for the staff, they could lean into the right tools for the job.

- ▶ Projects are easier to see at a glance
- ▶ Data isn't entered six times in six places
- ▶ Decisions happen faster
- ▶ Collaboration actually feels effortless
- ▶ Leaning into already invested Microsoft tools

