

Charter Court Financial Services achieves state-of-the-art project management transformation with **Microsoft Project Online**



"We work, with greater visibility, advanced management information, and improved reporting ensuring we consistently make the right strategic decisions for the business."

Simon Drinkwater
Associate Director of Change Delivery

Industry
Financial Services

Location
West Midlands

Challenge
To drive innovation by proactively delivery transformative change projects and portfolios.

Solution
A cloud-based project management solution for enhanced visibility, reporting and governance.

Products and Services
Microsoft Project Online
Power BI

Results
Greater visibility over the project portfolio, advanced management information, and improved reporting to fuel strategic decision making.



In order to support terrific business growth, Charter Court needed to enhance and transform its project management function, to not only to give greater capability to its Project Managers and Change Function but to also provide a first class service, delivering an open and transparent change culture expert in managing and delivering projects. Microsoft Project Online offered the next-generation project management capabilities it needed to gain greater visibility over an ever-growing and complex account portfolio, improve information sharing across the business, enhance reporting and empower advanced decision-making.

Charter Court is one of the UK's fastest growing specialist mortgage banks focused on delivering sustainable, profitable growth by helping customers underserved by traditional high street banks. It achieves this by delivering specialist solutions, attractive products and exceptional value and savings. Operating under three specialist brands – Precise Mortgages, Exact Money Experts and Charter Savings Bank - it delivers value with a technology-driven approach focused on efficient processing, strong risk control, timely reporting and responsive product development.

The Catalyst for Change

As a rapidly growing business operating in a fast-moving and heavily regulated market, Charter Court's change department wanted to drive innovation by becoming a dynamic

Key benefit

Charter Court has greater visibility over the project portfolio, advanced management information, and improved reporting, ensuring the right strategic decisions can be made for the business.

"We still have to react to the unforeseeable from time to time, but we now have early warning indicators which enables us to make more informed decisions on the remediation steps we need to take – this is a huge transformative change."

Simon Drinkwater
Associate Director of Change Delivery

"We can now give much greater project visibility to other parts of the business and the management information and reporting we get keep us focused on the critical delivery factors. I can see the growing confidence around the business, and I get much fewer surprises which is incredibly empowering."

Simon Drinkwater
Associate Director of Change Delivery

multi-disciplined change function that anticipates needs and proactively delivers transformative change. To deliver its vision, it needed to modernise elements of the technology stack and harness advanced tools to reshape and optimise its project and portfolio management functions. The end goal was to give its people greater capability and tools to improve the ways in which they could work, and to improve how projects are managed through greater visibility, strong risk control, enhanced reporting and improved collaboration.

With a team of 18 project managers, handling as many as 100 projects at any one time using just SmartSheets, Excel and stand-alone Microsoft Project Plans, the business was struggling achieve the level of visibility needed for advanced, informed, and insight-driven decision making. It wanted to empower its project managers to do what they do best, by providing tools that would advance their core capabilities and areas of expertise - no longer simply reacting to needs but prioritising activities that would improve change outcomes and align with long-term business goals.

"We had reactive but short term project management approach. We were very good at delivering, but were hampered in our ability to predict what was coming next. We needed a more structured, dynamic and proactive project and portfolio management function befitting a FTSE 250 business."

Simon Drinkwater, Associate Director of Change Delivery.

Enabling future-proof working

Charter Court wanted its project managers to have the industry leading toolset. Microsoft PPM (Project Online) provides a reliable and cost-effective PPM platform, with insightful and easy-to-use PowerBI dashboards offering the ability to achieve a 360° view of portfolios – enhancing visibility of data, giving an immediate view of risks, empowering strategic decision making, delivering advanced management information for granular and top-level project management planning, and vastly superior reporting functionality for improved governance. Rather than choosing a 'one-size-fits all solution', Charter Court leveraged the customisation features in Project Online to arrive at a tailored, fit-for-purpose platform suited to a fast-growing organisation with an increasingly complex project and portfolio management requirements.

"Tailoring the solution ensured rapid user adoption, with the team easily adapting and embracing the opportunities for change from day one. The greater visibility and improved control has blown our project managers away. It lets them get back to doing what they do best."

Simon Drinkwater, Associate Director of Change Delivery

Improved visibility delivered by Microsoft Project Online's powerful PowerBI dashboards made an immediate impact on the business. The granular portfolio-level views ensure every member of the team, as well as other parts of the business, know exactly what is happening with every project in the pipeline against reportable milestones. A greater level of transparency has also improved risk management. A live view of declining trends across the portfolio, enables the change leader to spot early warning signs, or identify potential roadblocks to successful delivery and take remedial action.

Everyone in the project management and leadership teams now access consistent information, fundamentally changing how they make decisions and the actions they take

actions both now and in the future. It's also enabling a more proactive and predictive approach; the team can test 'what if' scenarios at the touch of a button, exploring the outcomes of both action and inaction for advanced strategic decision making, financial planning, resourcing, and contingency management.

"With Microsoft Project Online we've gone from firefighting to being a controlled, efficient, planned and highly productive project management function. The culture of our team has changed – performance underpins every aspect of how we work and improved reporting ensures we consistently make the right strategic decisions for the business."

Simon Drinkwater, Associate Director of Change Delivery

"The resourcing functionality makes a big difference to me personally. I can see resourcing allocations at the click of a button and very quickly make changes to avoid individual team members becoming over-burdened and keep projects on track."

Simon Drinkwater
Associate Director of Change Delivery

Looking to the future, Charter Court is already planning the next phase of development, integrating with SharePoint to extend visibility even further across the business, and taking advantage of the wider range of advanced tools available to improve intelligent long-term planning. For example, the new Roadmap feature in Project Online will give the team a single view of all their projects, helping them to share combined project information, highlight the most important work, quickly spot problem areas early and collaborate with others.

As the teams trust in Microsoft Project Online continues to build and the leadership team benefits from the superior level of insight it delivers, Charter Court have complete confidence that they have built a strong platform from which to further accelerate change for the benefit of its people, its stakeholders, and its customers.

Business benefits

Improved visibility

Project managers now have total visibility over their portfolio. Real-time 360° view of portfolio data ensures projects stay on track and that they have an immediate view of risks.

Advanced reporting

Self-serve access to consistent information, represented in a consumable way, delivers both granular and top-level project management views which has enabled a more proactive approach and greater governance.

Improved efficiency and productivity

Projects are now delivered with greater efficiency. Improved portfolio insight has fundamentally changed how the team work, improving productivity and keeping project manager focused on core activities, and generating measurable improvements in resource allocation.

Portfolio optimisation

An improved ability to prioritise actions and align activities to wider change management and strategic business goals enables a more predictive approach to testing 'what if' scenarios for improved outcomes.

Insight-driven decision making

From reactive to proactive. Deeper portfolio insight is driving an ability to not only understand immediate needs but predict future requirements for improved long-term success.

Excellent Risk Management

Risks can be identified early and managed proactively through management information provided, to enable more accurate and effective project delivery