

# Microsoft Project Online Case Study



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

## Overview

### Customer

Charter Court Financial Services

### Products and Services

Project Online

### Organisation Size

Large

### Country

United Kingdom

### Industry

Financial Services

### Results

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

**Wellingtone**  
PPM Intelligence

### Contact

Web | [wellingtone.co.uk](http://wellingtone.co.uk)

Email | [info@wellingtone.co.uk](mailto:info@wellingtone.co.uk)

Phone | +44 (0) 1753 621200

Gold  
**Microsoft Partner**  
Project and Portfolio Management



## Wellingtone and Charter Court Financial Services: Delivering Change Through state-of-the-art Project Management Transformation

Charter Court’s change department wanted to provide flexible, scalable and timely change to its stakeholders and end customers with first-class service. To support this vision, it needed to modernise its project management function, providing new ways of working, driving productivity enhancements and enabling a transformative change management strategy to support a growing and successful business. 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.

“Wellingtone guided us effectively through each stage of the process, constantly adapting as we evolved our understanding of what we could achieve and delivering ideas to enhance the solution. Not only did they make the process as easy as possible, but they delivered on their promises very quickly. Within three months, we were up and running.”

**Simon Drinkwater, Associate Director of Change Delivery - Charter Court**

## 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 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 improve the ways in which its people work, and how projects are managed through greater visibility, 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 a very capable but reactive 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 - Charter Court**



## 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.

## Enabling Future-proof Working

Charter Court wanted its project managers to have the industry leading toolset - Microsoft PPM (Project Online). To maximise the return on their investment and optimise the solution for its individual needs, Charter Court turned to Wellingtone as its change delivery partner.

Wellingtone delivered a reliable, cost effective and cloud-based PPM platform, based on Project Online. Its insightful and easy-to-use dashboards delivered through PowerBI offer the ability to achieve a 360° view of its portfolios - enhancing the visibility of data, giving an immediate view of risks, empowering strategic decision making, delivering advanced MI for granular and top-level project management planning, and vastly superior reporting functionality for improved governance.

*When it comes to Wellingtone, I would highly praise their approach - they listened, they understood, they advised and they delivered. But they also supported us, not just deploying a shiny new toy, but laying the foundations with training and knowledge to reduce the complexity and improve adoption. Without them we would've struggled."*

**Simon Drinkwater, Associate Director of Change Delivery - Charter Court**

## A Partnership for Future Success

Wellingtone gathered the core business requirements to determine the functionality that would make the biggest difference now and in the future. A strong consultative approach ensured Charter Court would not just receive a standard one-size-fits-all solution, but rather one defined using a collaborative approach, and optimised by cherry-picking the exact functionality for its individual needs.

Working to an aggressive timeline, Wellingtone built an executable roadmap for deployment of the PPM platform and supported rapid user adoption to ensure Charter Court would reap the rewards of their investment immediately. Bespoke training made the adoption process very simple, with the project management team easily adapting to the solution and embracing the opportunities for improvement it delivered from day one.

Improved visibility 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.

Likewise, Charter Court benefits greatly from the advanced dashboard reporting functionality delivered. 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.

*"We recognised very quickly that we had a great partner in Wellingtone. They worked hard to understand our business and every aspect of our requirements. Rather than going all-out with functionality, they ensured the solution deployed would be tailored, fit-for-purpose and simple to implement."*

**Simon Drinkwater, Associate Director of Change Delivery - Charter Court**