

CASE STUDY



Towpath Credit Union



PROJECT

M365 and CSP – Cloud Solution Provider

OVERVIEW

Improving collaborated with Towpath Credit Union to assist in their digital transformation journey. Initially, we introduced them to the capabilities of Microsoft 365 (M365) through our Enablement Workshop. This laid the foundation for transitioning their operations from on-premises to cloud-based solutions. The project has since evolved, incorporating Cloud Solution Provider (CSP) services, leading to a long-term relationship centered around continuous modernization and supporting their IT infrastructure needs.

BUSINESS PROBLEM

Towpath Credit Union was operating on traditional on-premises infrastructure, which limited their ability to leverage modern cloud technologies. They recognized the need to transition to a more scalable and flexible environment but lacked the expertise to identify the right tools and strategies. The organization wanted to explore the Microsoft ecosystem but needed guidance on implementation and pathway to cloud adoption, especially considering the need for a seamless transition without disrupting their ongoing operations.

OUR APPROACH

We initiated the engagement with Towpath Credit Union through a personalized Enablement Workshop to introduce them to the M365 platform. This workshop included in-depth sessions with both technical staff and business leaders to identify their needs and clarify their goals. The outcome was a detailed roadmap outlining immediate, mid-term, and long-term milestones for transitioning to a cloud-based environment. Our approach focused on modernizing their infrastructure, including relocating on-premises resources to Azure, enhancing productivity with tools like Power BI, and eliminating dependencies on physical hardware.

CASE STUDY



BUSINESS BENEFITS

- **Enhanced Scalability:** By transitioning to Azure, Towpath Credit Union significantly increased its ability to scale resources as needed.
- **Improved Productivity:** Utilization of M365 tools such as Teams and Power BI enhanced collaboration and decision-making capabilities.
- **Cost Efficiency:** Eliminating on-premises hardware reduced maintenance costs and redirected resources towards innovation.
- **Strategic Roadmap:** A clear, actionable strategy enabled phased implementation, minimizing disruption and ensuring continuous improvement.
- **Client Retention:** A strong relationship fostered ongoing CSP services and opened up additional project opportunities.
- **Market Competitiveness:** Modern infrastructure positioned Towpath Credit Union ahead of many peers in the credit union industry.

TECHNOLOGIES AND METHODOLOGIES USED

- **Microsoft 365:** Provided a comprehensive suite of productivity and collaboration tools.
- **Azure:** Enabled cloud migration and infrastructure modernization.
- **Power BI:** Facilitated data-driven decision-making through advanced analytics.
- **Skype/Teams:** Streamlined communication and collaboration.
- **Enablement Workshop:** Customized workshops to align business objectives with technology solutions.
- **CSP Services:** Ongoing cloud management and support services to ensure smooth operation.

PARTNERSHIPS

Our partnership with Towpath Credit Union began through personal relationships, which evolved into a strategic collaboration. The Enablement Workshop showcased our expertise and built trust, leading to their commitment to our CSP services. This partnership has enabled continuous dialogue, allowing us to support their evolving needs and propose additional services. The strong relationship has established Towpath as a "friendly client," receptive to testing new offerings and providing valuable feedback.

CASE STUDY



LESSONS LEARNED

1. **Client Workshops:** Tailored workshops are instrumental in aligning client objectives with technological capabilities.
2. **Phased Implementation:** A strategic roadmap with phased milestones ensures smooth transitions and minimizes disruptions.
3. **Building Trust:** Establishing personal relationships can lead to long-term partnerships and recurring business.
4. **Flexibility and Scalability:** Cloud solutions provide significant advantages in terms of scalability and flexibility.
5. **Ongoing Support:** Continuous CSP services ensure sustained client satisfaction and operational efficiency.
6. **Innovation Opportunities:** Successful engagements can open doors for additional projects and innovations.

CONCLUSION

This case study highlights our successful collaboration with Towpath Credit Union, where we demonstrated our expertise in guiding clients through digital transformation using M365 and CSP services. Our distinct approach, which includes strategic workshops and personalized roadmaps, sets us apart by ensuring clear objectives and seamless implementation. The long-term partnership with Towpath Credit Union illustrates our commitment to client success and positions us as a trusted advisor for future technological advancements.

GET STARTED

Learn more about how Improving can help you get started by contacting us today at sales@improving.com