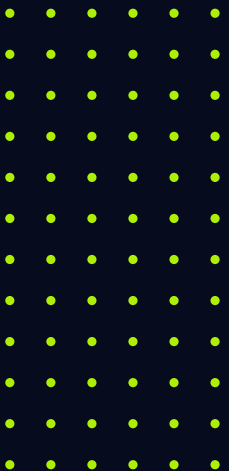


Ephrata National Bank

Revolutionized Their PMO
With ProjectManager





Ephrata National Bank

Company name: Ephrata National Bank (ENB)

Location: Pennsylvania, USA

Website: epnb.com

Industry: Banking

Size: 300 employees

Why ProjectManager?

Ephrata National Bank (ENB) needed a platform to collaboratively manage projects in order to enhance communication and efficiency. There are many platforms available in the industry, some that are standalone and others that require dedicated administrators to build and maintain. ProjectManager appeals to all business units and centralizes collaboration. Now, the team can build project plans on the Gantt chart, track resources in real time and collaborate without the need to email back and forth on lengthy, complicated projects.

Before ProjectManager

- ✗ No project tracking software in place
- ✗ Business Units driving their own initiatives without a systematic process for review, approval and implementation

After ProjectManager

- ✓ Enhanced ability of ENB Project Management Office to plan and coordinate numerous projects simultaneously
- ✓ Improved intradepartmental connection and collaboration resulting in increased efficiency

Introduction to Ephrata National Bank

Michael J. Sosnowski is a project manager at Ephrata National Bank (ENB) located in Ephrata, PA - approximately 65 miles west of Philadelphia. ENB is a community bank with 13 full-service branch offices, 2 drive-thru offices and a loan production/deposit production office serving communities in Lancaster, Berks and Lebanon counties.

Sosnowski started at ENB in March 2020, right at the cusp of the COVID-19 shutdown. He began as a business analyst and within a year, the bank was looking to replace a lot of its platform software. "That was going to require a project management office (PMO)," he said. "That was Richard Brenner, who came in as the project manager and portfolio manager, and myself as project manager."

The need for a modern, plug-and-play solution to stay competitive

As ENB was evolving its approach to project management, it recognized the need to form a Project Management Office (PMO) to bring enhanced structure to project management while bringing like-minded resources and contributors together. As projects managed by the PMO grew in number and complexity, the bank recognized centralized project management software was necessary for effective project management.

"Historically, individual business units operated in a disparate manner," according to Sosnowski. "This created challenges with implementation as ancillary needs such as hardware, server space, etc. weren't given necessary consideration."

In response, the ENB Project Management Office began to standardize expectations and requirements for evaluating 3rd party vendors and their solutions to better align with organizational business needs, budget requirements, vendor management protocols, and Sarbanes-Oxley Act (SOX) controls.

As these requirements took hold, the next logical step was to bring more structure to the project management surrounding the implementation of these third-party solutions. This process drove the Bank to consider a solution that would allow them to do that.

Microsoft Project was limited and not collaborative

ENB first explored Microsoft Project, a major player in the industry, but it wasn't a good fit. "Microsoft Project was something we dabbled in to take our first steps in putting a model structure together," Sosnowski said, "but the limitations with that particular product, the licensing and the ability for multiple people to work in it at the same time didn't align with our particular needs."

There are about 300 employees at ENB, which means there's a lot of expertise coming from different areas. Instead of funneling it all through someone like Sosnowski, who admittedly isn't an expert in all those areas, they need collaborative software.

ProjectManager was the ideal solution

"Microsoft Project was not collaborative enough," states Sosnowski. "ProjectManager felt like the sweet spot in ENB's evolution. Rather than a low-end, single workstation licensed software or SharePoint site that would be very expensive to implement and administer, ProjectManager's cloud-based solution was right for us."

He adds, "We needed to have a more coordinated effort, while respecting that these business units were going to be the users of the software, and they have a certain need in their space too."

"Microsoft Project was not collaborative enough."

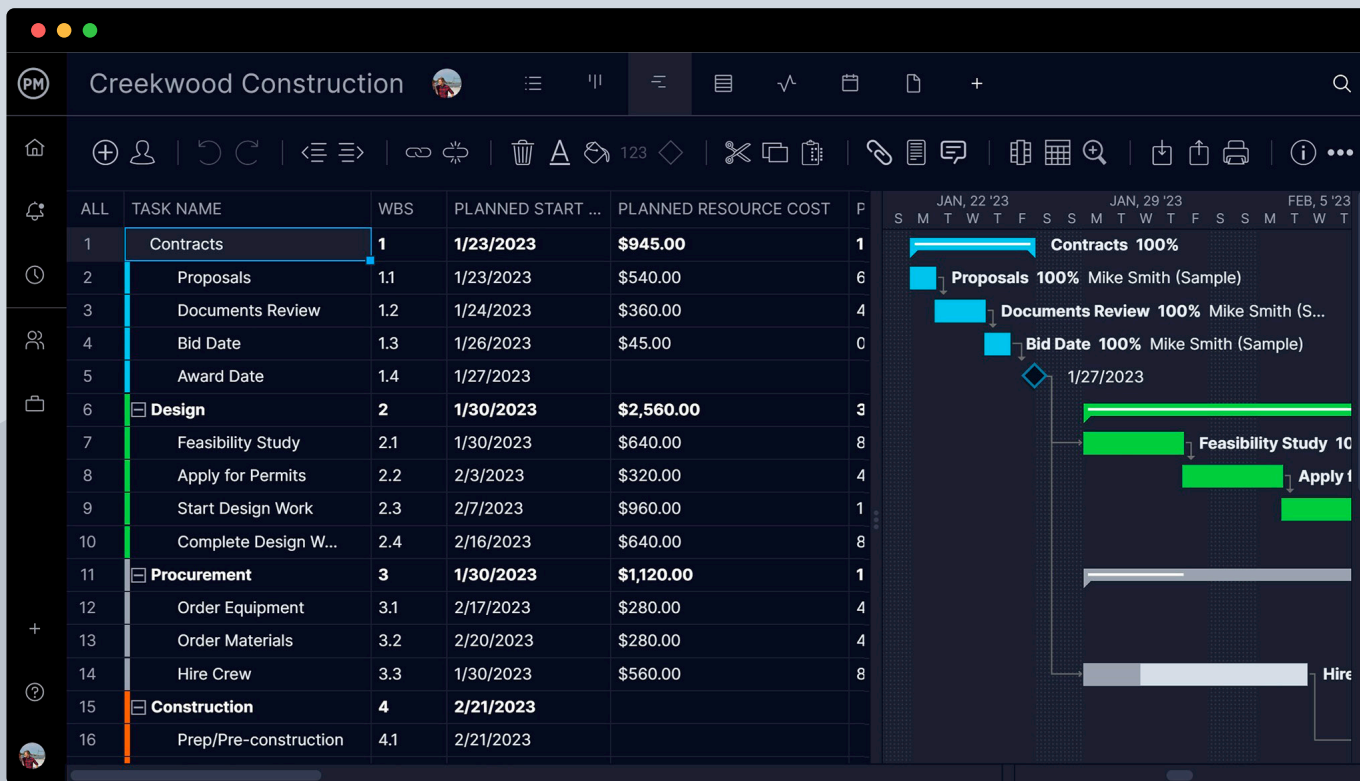


Multiple projects views and support at every phase

ProjectManager serves ENB in all activities that go into building the project including discovery, kickoff meetings, implementation, configuration, go live and post go live. “The connectivity from one thing to the next provided by the system’s linking feature is very nice because it tells you if there's going to be a delay,” Sosnowski added.

One noteworthy feature that ENB uses includes the Gantt chart. “Everything starts, obviously, with the project plan. That's where we do our initial kickoff with our project sponsor and our project resources to help them understand how the plan is put together,” Sosnowski said. “I like the views that ProjectManager offers, such as the sheet view or the list view along with the ability to customize the column configuration and filtering.”

Sosnowski also uses alerts on a regular basis. “Those generated alerts work very well to help people stay on task,” he said.



ProjectManager's dashboards monitor projects

ENB has projects that fall under the categories of strategic, tactical or operational. "Operational is less complex," Sosnowski said, "But ProjectManager is still very effective. Strategic projects are hundreds and hundreds of line items long where there are a lot more requirements on my part to be monitoring what's going on with the plan."

An example of a recent project in which ENB leveraged ProjectManager was an upgrade to their wire transfer system that facilitates domestic and international wire transfers for customers. Other projects involve IT systems as well as construction, mortgage and other departmental projects.

ENB uses dashboards for a high-level overview to help users understand task assignment and progress across multiple projects. "We also use the dashboard per project," Sosnowski said. "I really like that view because I can take a screenshot and put it into my status report".

Live resource tracking helps improve efficiency

"ProjectManager is very intuitive for individuals to go in and apply their own filters to know what they're responsible for and due dates they are supposed to be working towards," Sosnowski said. "And my ability to be able to dynamically communicate with them through the tool, rather than having to email back and forth, makes us work more efficiently."

The use of timesheets has also improved efficiency for ENB. "ProjectManager provides reminders and tools for any individual involved with a project to keep them on task. It enables a discipline of updating the project plan to tell me, as the project manager, where they are in getting this done."

"ProjectManager is very intuitive for individuals to go in and apply their own filters to know what they're responsible for and due dates they are supposed to be working towards."

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