Planisware   WSECU

Turning Strategy into Action:
WSECU's Journey to Project Discipline and Growth

At the Washington State Employee Credit Union (WSECU), every employee is also a member. That connection runs deep because every decision, every project, and every investment affects their future, their coworkers, and their community.

For 65 years, that mindset has driven growth. WSECU started as a small credit union for state employees. Today, it manages $5.4 billion in assets and helps thousands of members reach their financial goals. But growth creates challenges. How do you scale smartly, invest wisely, and keep every initiative aligned with long-term success?

The Challenge:
A Culture of Yes—But at a Cost

WSECU is a place where collaboration runs deep. Employees help each other, leaders listen, and teams work toward a common goal. But that same spirit of teamwork had an unintended side effect: They said yes to every idea.

"We had 150 things people wanted to do, and we struggled to say no," recalls Lori Kaid, VP of Enterprise Agile Project Services. "Everyone has great ideas, but we cannot (and should not) do them all. "

That worked when WSECU was smaller. But as they grew, projects piled up, resources stretched thin, and strategic priorities became harder to manage.

"What is important is to be focused on what you want to accomplish to ensure you can adjust when the market shifts and adjustments need to be made", she noted.

When the pandemic hit, suddenly, WSECU had to pivot fast, rolling out new services while adapting to rapid regulatory changes. That's when it became clear that they needed a better way to prioritize, allocate resources, and align their work with long-term goals.

## Bringing Focus to a Mission-Driven Organization

At WSECU, every project needs to serve a purpose—help members reach financial goals, strengthen communities, and drive long-term growth. But good intentions weren't enough. To deliver results, WSECU needed focus.

"We had to bring people along," says Lori Kaid, VP of Enterprise Agile Project Services. "That meant creating clarity and discipline—so teams could see what mattered and prioritize work that moved us forward."

The first step? Making priorities visible. Spreadsheets and SharePoint weren't enough. WSECU introduced a Quarterly Business Review (QBR) process, where leaders could ask:

- Are we focused on the right work?

- Do we have the resources to execute?

- Will this initiative make a real impact?

The results were immediate. In one review, 35% of projects were removed, freeing up resources for higher-priority work. Teams broke down silos and started collaborating across departments, improving alignment. With real-time insight into project status, leaders made faster, more informed decisions.
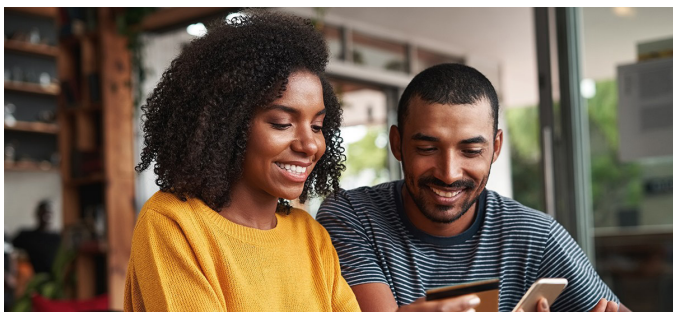
> **"** *Before, leaders had to dig through reports to understand what was happening,"* **Kaid explains.** *"Now, we have a clear view of everything. We can act fast and make informed decisions."*

But visibility only solved part of the challenge. WSECU needed a system to centralize project data, track progress, and keep teams aligned.

Enabling Agility with Planisware Orchestra

WSECU also needed a better way to track projects, shift resources, and speed up decision-making. Spreadsheets and scattered reports weren't enough. Planisware Orchestra gave them one place to manage work, align priorities, and support their shift to an organizational portfolio mindset.

With Orchestra, WSECU has:

- **Streamlined idea submission,** ensuring projects align with strategic and financial goals

- **Improved visibility,** so teams can track progress and adjust when priorities shift.

- **Created a structured review process,** helping leaders focus on the most important work.

"Before Planisware, project updates were scattered, and teams worked in silos," says Kaid. "Now, we can see everything in one place, make quick adjustments, and stay focused on our strategic priorities."

Looking Ahead:
Scaling for Their Future

WSECU is building for the future. We realize to execute on our vision will need improved rigor around our processes to continue delivering on our vision. "With growth comes required discipline to support industry expectations and organizational efficiencies", Kaid says.

To get there, they are moving to monthly reviews so teams can adjust priorities faster. They are working toward having the data needed to plan capacity, ensuring resources go where they are needed most. Every initiative must create lasting value by improving operations, enhancing member services, or strengthening financial growth.

Orchestra now plays a central role in that journey. "It's part of how we run the business—from confirming what we're working on to deciding what comes next," Kaid adds. "It's helping us as we grow towards a $10B organization."

> *We're growing with purpose,"* *Kaid says. "We're making smarter decisions, staying focused, and ensuring WSECU is ready for what's next."*

Lessons for Financial Leaders

WSECU's journey offers a vision for stronger, more strategic execution in financial institutions.

- **Focus drives results.** Saying "yes" to everything spreads resources thin. The strongest organizations focus on work that moves them forward.

- **Visibility improves decisions.** Real-time insights help leaders adjust faster and act with confidence.

- **Agility sets leaders apart.** Markets shift. Regulations change. Institutions that pivot quickly stay ahead.

For WSECU, this transformation is just the beginning. With the right structure and discipline, they are building a future-ready credit union—one built to grow, adapt, and lead.