BrightWork365

Standardized Project Management Templates for Microsoft 365

Presented By

Jonathan Weisglass

Customer Education Manager

Session Overview

1. Overview of BrightWork 365 for Microsoft 365
2. Project Management Starter Templates
3. Give Your Projects a Head Start with Content Templates
4. Configure and Customize Templates for Your Needs
5. Q&A

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The BrightWork 365 Solution

Everything you need to Manage Requests, Projects, and Portfolios with **Microsoft 365, Power Platform,** and **Teams.**

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BrightWork Project Management Success Approach: Start-Evolve

It is a core element in our:

- Software - with Configurable Templates
- Deployment Process
- Personalized Services

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Quick Poll

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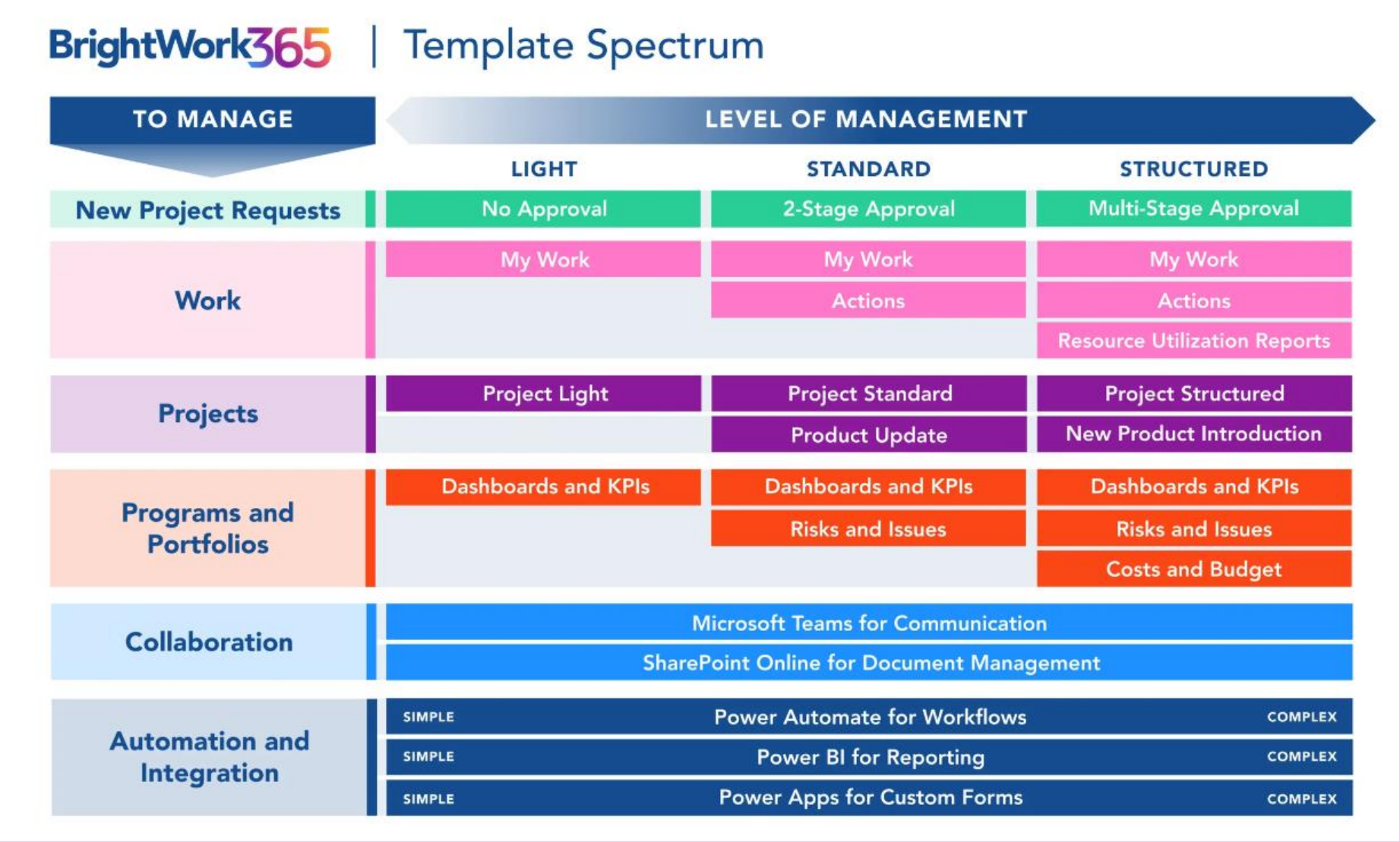
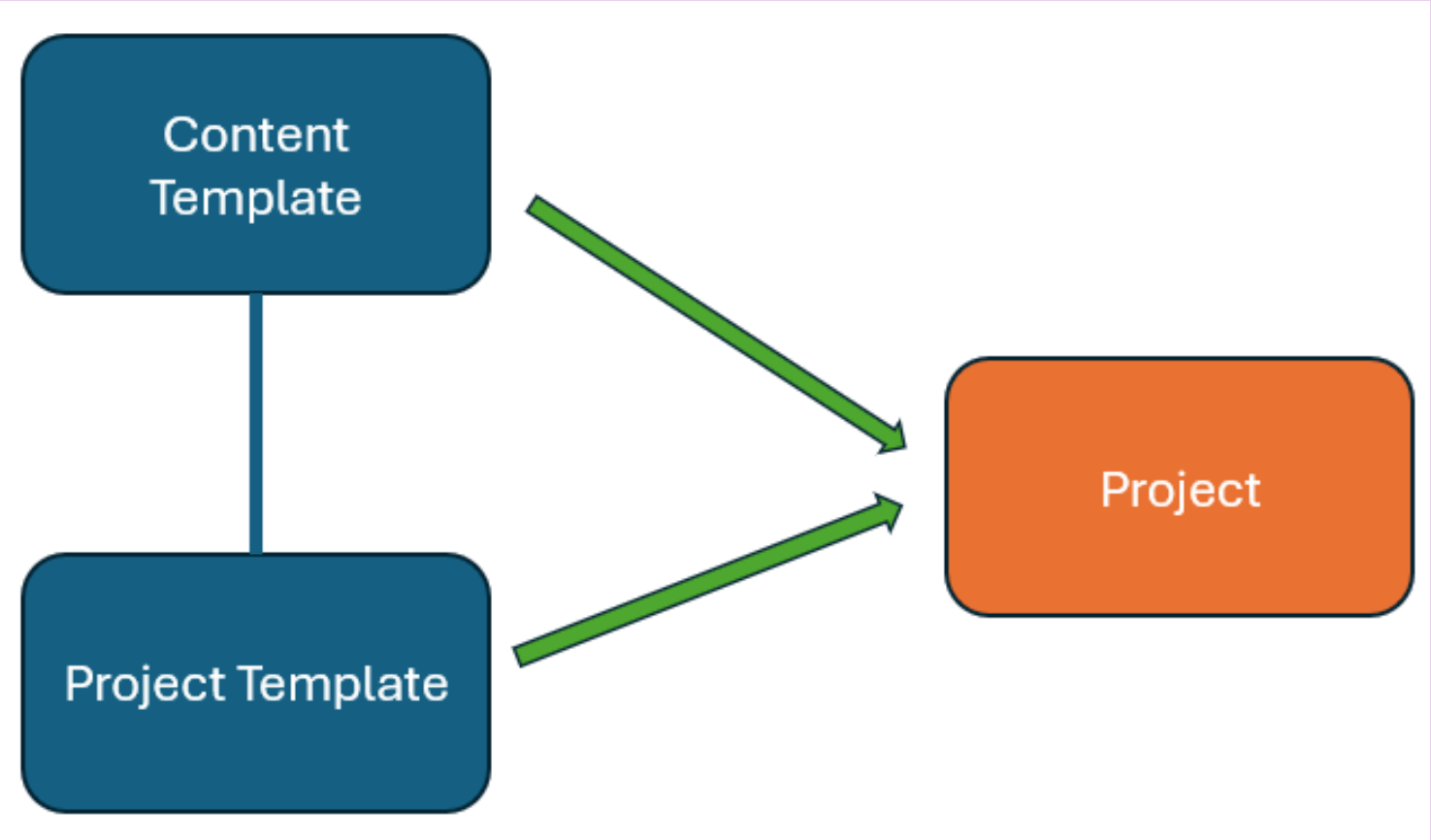
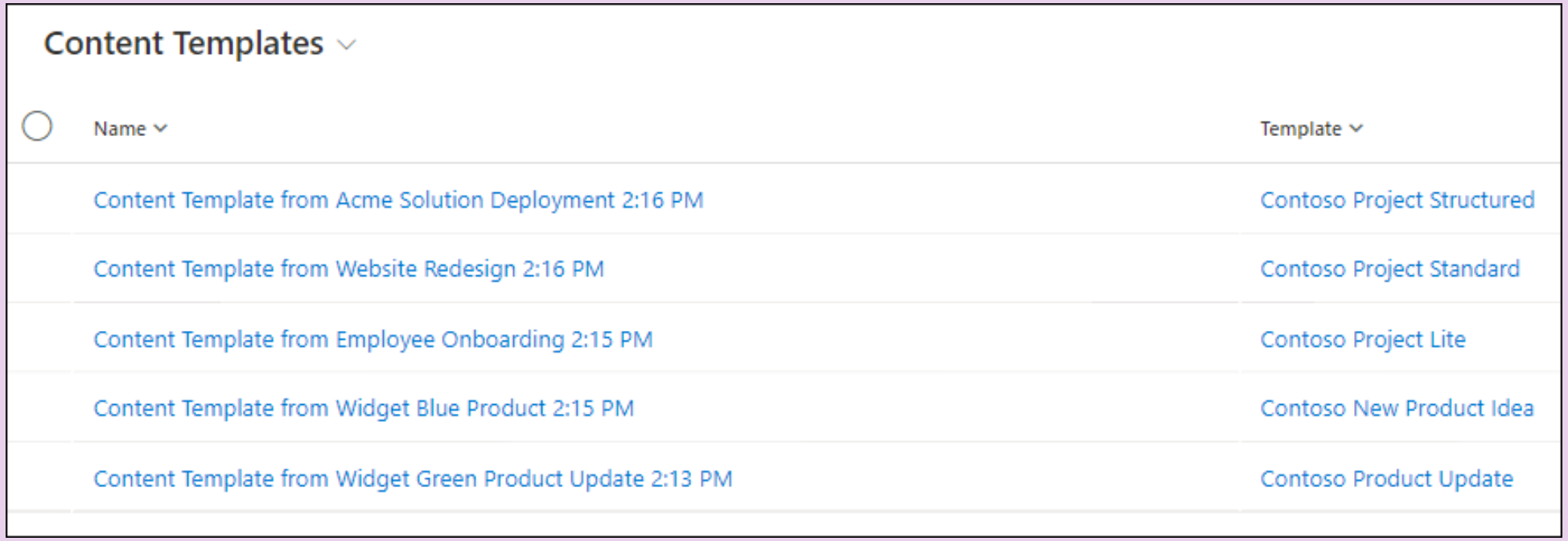
Project Management Starter Templates



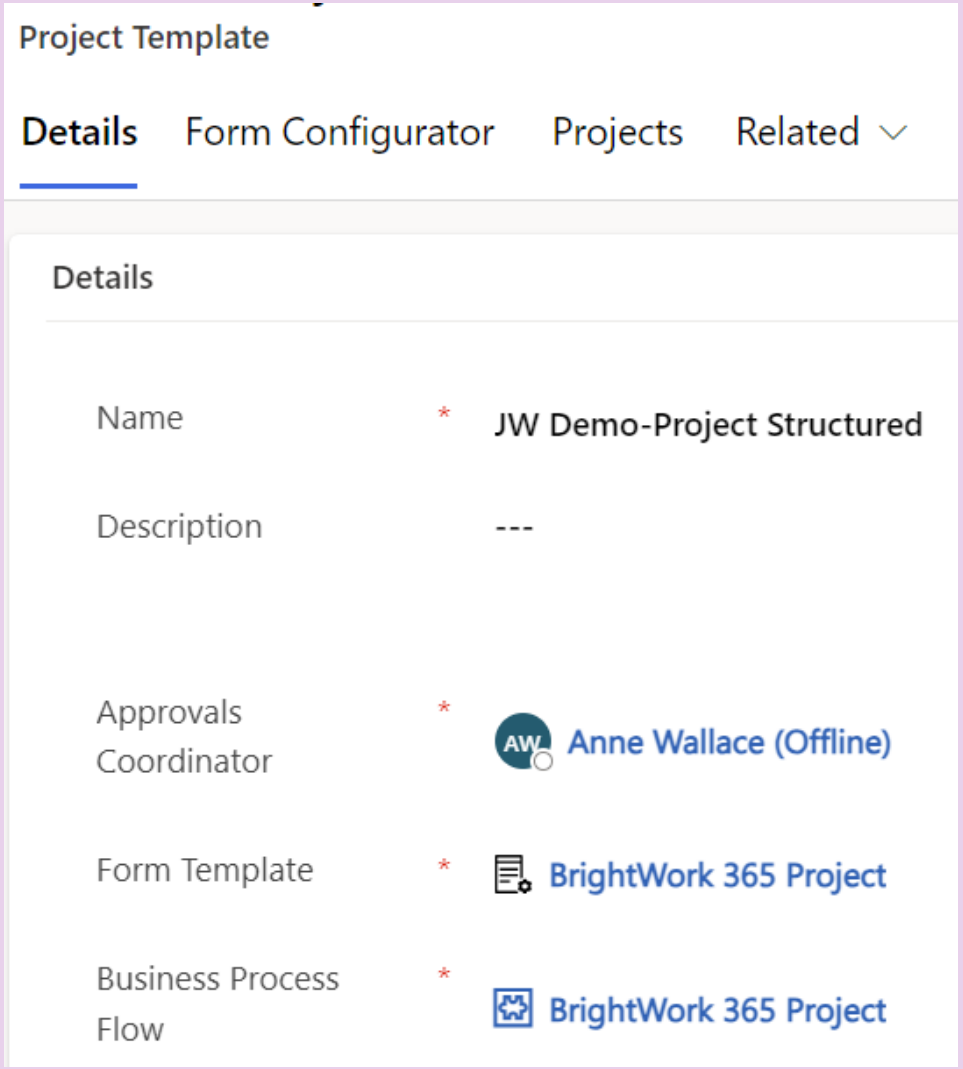
Give Your Projects a Head Start with Content Templates



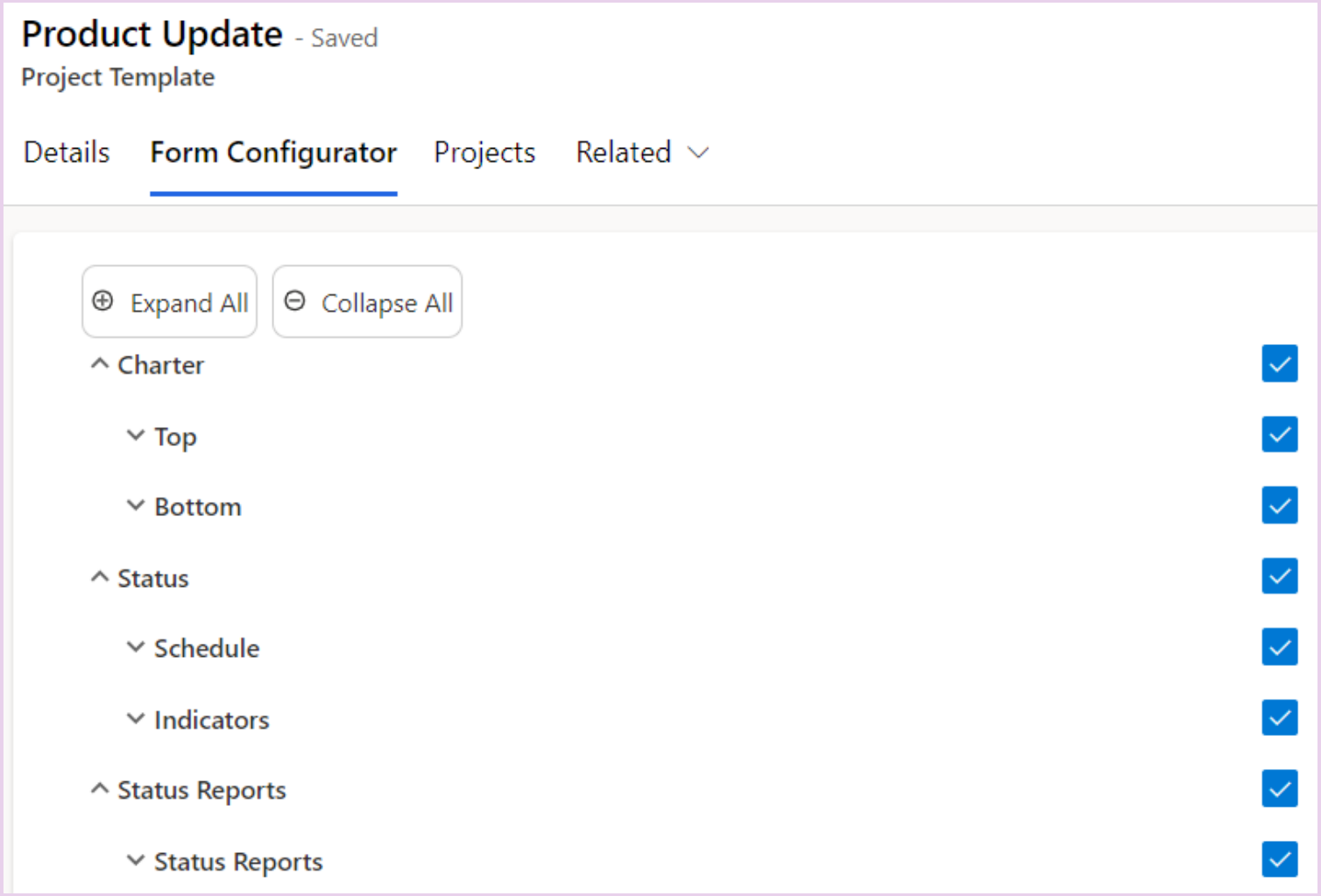
Give Your Projects a Head Start with Content Templates



Leverage a Variety of Business Process Flows & Forms



Configure and Customize Templates for Your Needs



Questions

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THANK YOU!

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Next Steps

For discussion, more ideas and Q&A, contact us!

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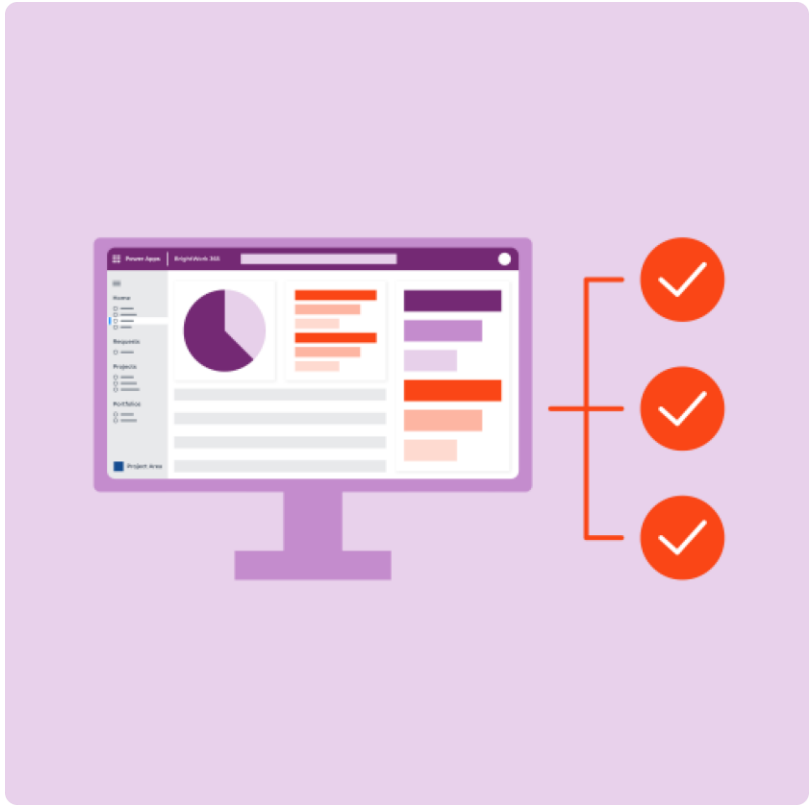

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Appendix

BrightWork Project Management Success Approach: Start-Evolve

It is a core element in our:

- Software - with Configurable Templates
- Deployment Process
- Personalized Services

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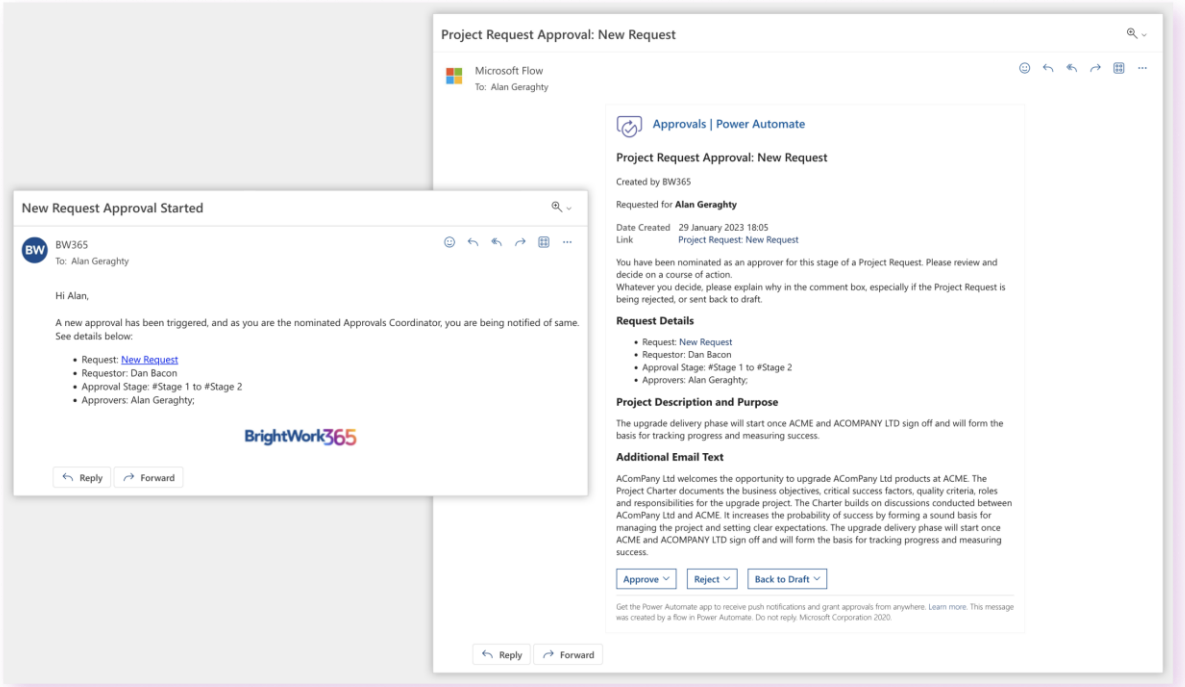
1. Process New Project Requests

Streamline your project selection and approval process.

- Get ample visibility and control with BrightWork 365 Request dashboards
- Set up different stages where you can easily Draft, Accept, Approve Requests, and Create Project.
- Stay updated on actions taken on new project requests with automated notifications.
- Develop a consistent approach with configurable templates driven by Microsoft Power Automate.



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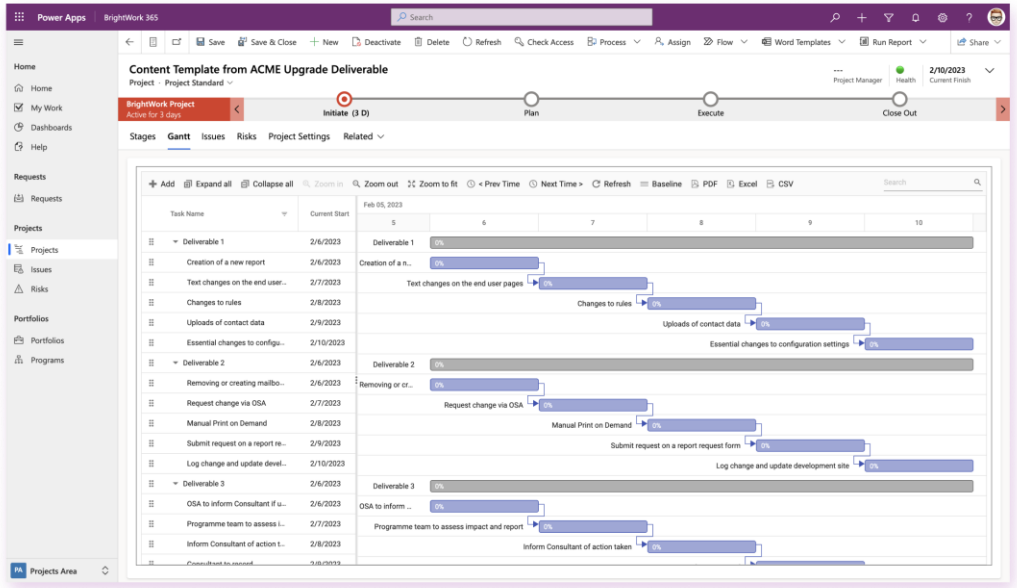
2. Manage Projects

Align your project goals, tasks, and teams with one solution.

- Set up projects with ready-to-use templates and familiar Microsoft 365 apps.
- Automate key tasks with Power Automate-driven built-in workflows.
- Use Power Apps and Power BI dashboards with unique selectors to filter and analyze complex data.
- Collaborate and engage from anywhere using Microsoft Teams.
- Use advanced features: Charter, Team, Stages, Gantt charts, My Work, Status, Documents, Issues, Risks, and Project Settings.



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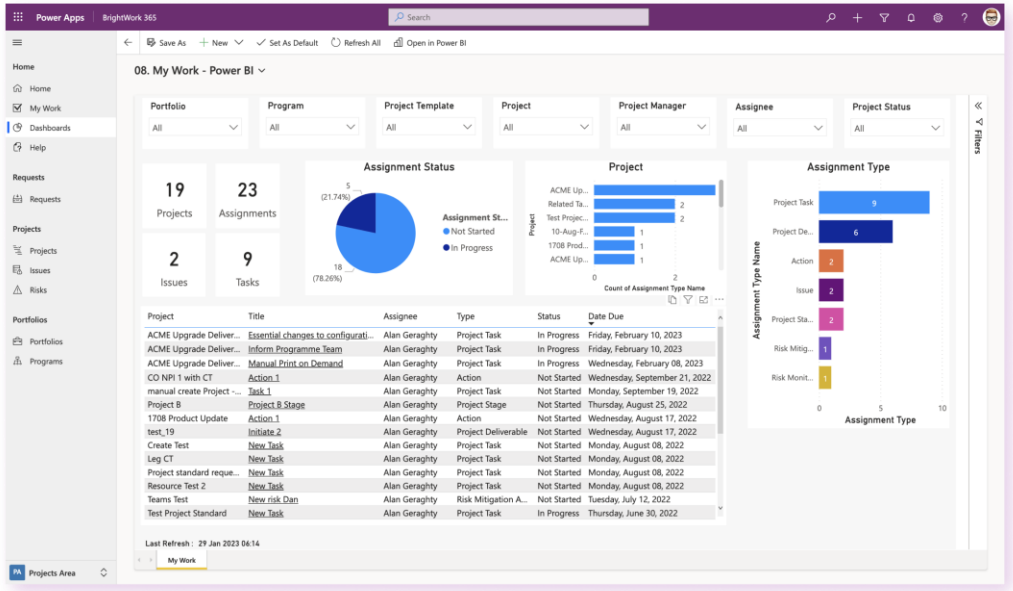
3. Control Portfolios

Get full visibility of your projects and programs across portfolios.

- Track the performance of your project portfolios with indicators for status, health, issues, and risks.
- Capture real-time data and customize it to create and share project performance reports in a few steps.
- Make data-backed business decisions with easy access to stats and performance.
- Create Microsoft Teams channels to collaborate on multiple projects withing programs.



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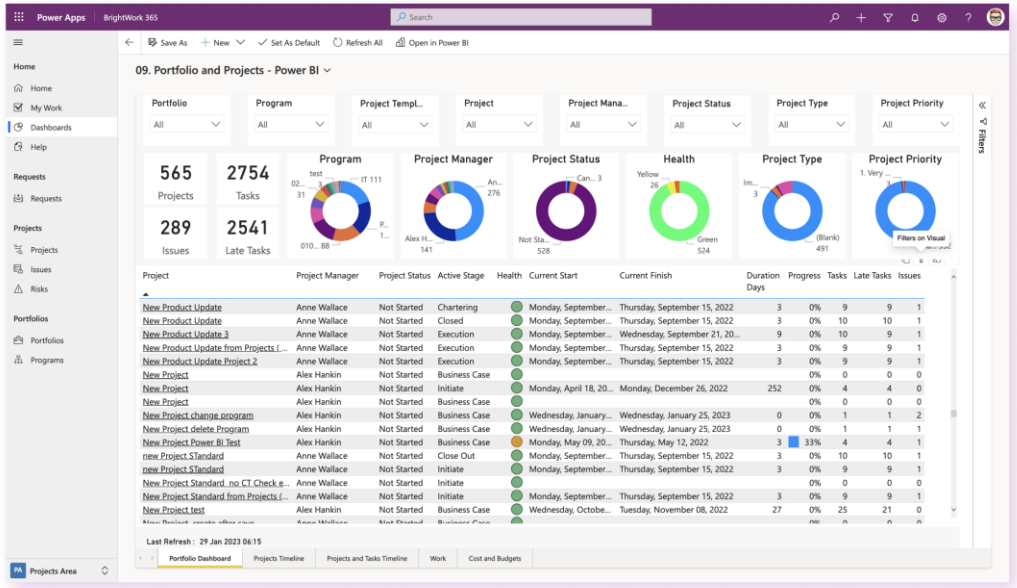
4. Improve Organizational PPM

Enhance your project management strategy, processes, and practices.

- Collaborate with your dedicated Customer Success Partner(s) - to address your current PPM needs and to action towards desired goals.
- Get experts to review and evolve your PPM Success Strategy.
- Get access to new features of BrightWork 365 with every new release.
- Add new best-practice templates to support additional project types, business processes, and new business groups.
- Personal and Collaborative Leadership - training material by BrightWork CEO, Éamonn McGuinness.



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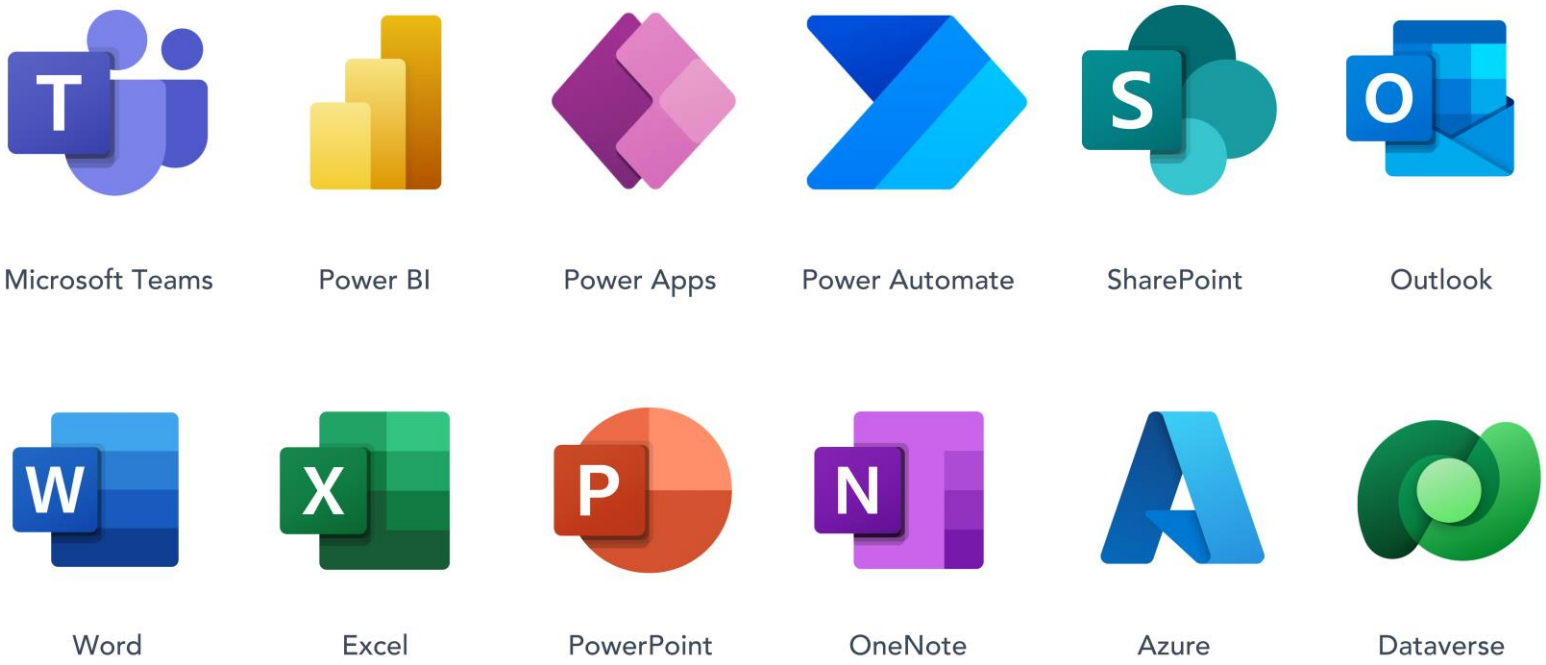
5. Leverage Microsoft 365

Making the best of your Microsoft 365 environment with our **Microsoft Integrations**



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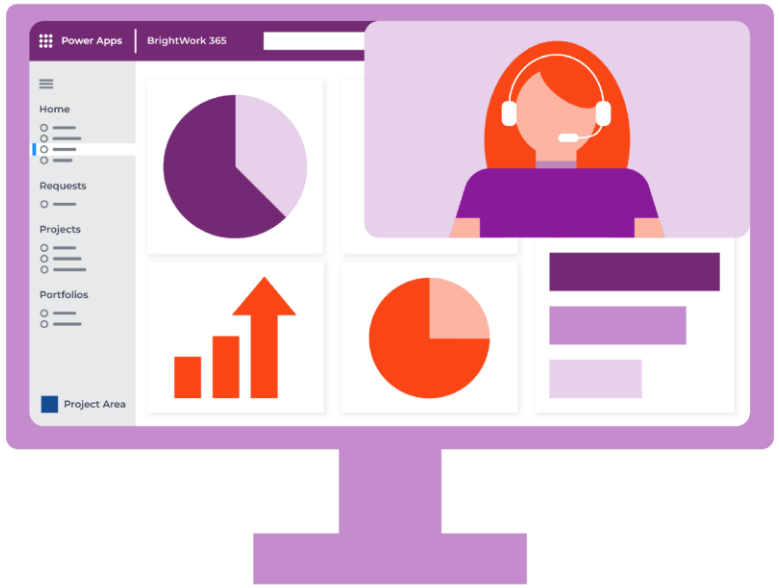
BrightWork 365 Personalized Services

Continuous support in deployment, review, and strategy



Subscription Services:

- **BrightWork 365 Support** – Questions, Issues, Training Resources
- **Project Management Success Review** – Immediate Needs, Update PPM Success Strategy

Deployment Services:

- **Start** – Immediate Standardization and Visibility for better Control
- **Evolve** - Mature PPM processes for timely and predictable outcomes
- **Augment** – Dedicated resources, methodology, and advisory in a localized model

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BrightWork 365 Customer Success Stories

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