



Standardized Project Management Templates for Microsoft 365



Presented By

Jonathan Weisglass

Customer Education Manager

Session Overview

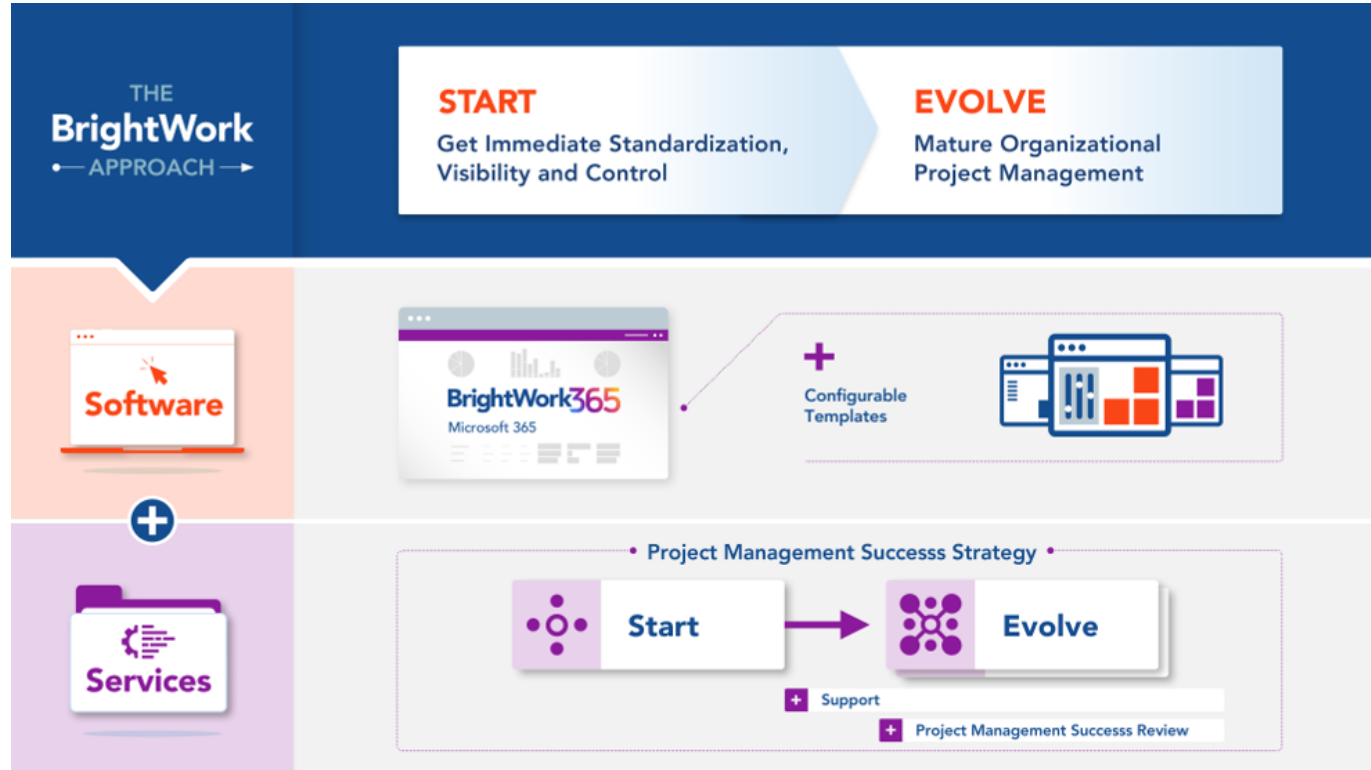
1. Overview of BrightWork 365 for Microsoft 365
2. Project Management Starter Templates
3. Give Your Projects a Head Start with Content Templates
4. Configure and Customize Templates for Your Needs
5. Q&A

The BrightWork 365 Solution

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



BrightWork Project Management Success Approach: Start-Evolve



It is a core element in our:

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

Quick Poll

BrightWork365

DEMO

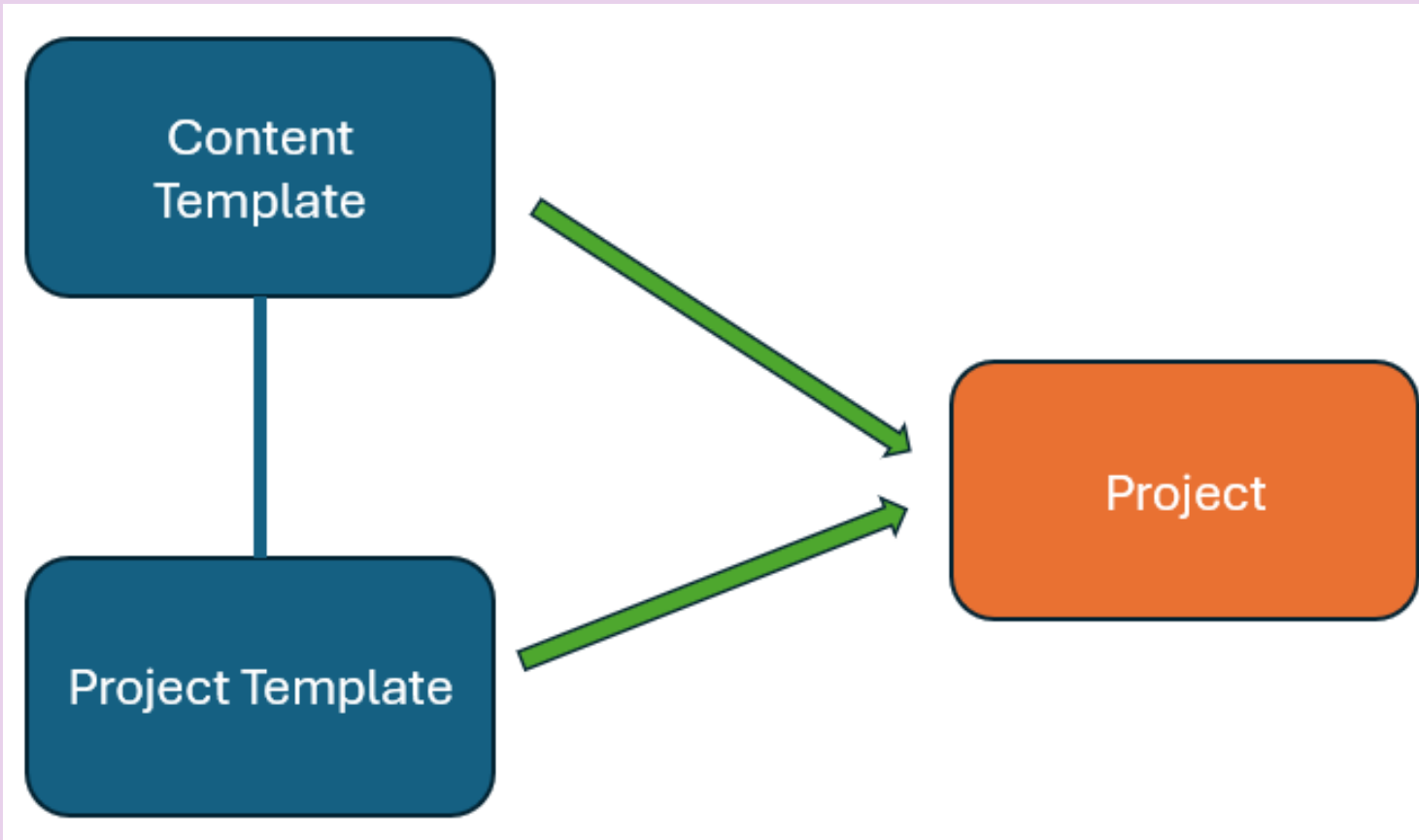
BrightWork365

Project Management Starter Templates

BrightWork365 | Template Spectrum

TO MANAGE	LEVEL OF MANAGEMENT		
	LIGHT	STANDARD	STRUCTURED
New Project Requests	No Approval	2-Stage Approval	Multi-Stage Approval
Work	My Work	My Work	My Work
		Actions	Actions
			Resource Utilization Reports
Projects	Project Light	Project Standard	Project Structured
		Product Update	New Product Introduction
Programs and Portfolios	Dashboards and KPIs	Dashboards and KPIs	Dashboards and KPIs
		Risks and Issues	Risks and Issues
			Costs and Budget
Collaboration	Microsoft Teams for Communication		
	SharePoint Online for Document Management		
Automation and Integration	SIMPLE	Power Automate for Workflows	COMPLEX
	SIMPLE	Power BI for Reporting	COMPLEX
	SIMPLE	Power Apps for Custom Forms	COMPLEX

Give Your Projects a Head Start with **Content Templates**



Give Your Projects a Head Start with Content Templates

Content Templates ▾	
<div><div></div><div>Name ▾</div></div>	Template ▾
Content Template from Acme Solution Deployment 2:16 PM	Contoso Project Structured
Content Template from Website Redesign 2:16 PM	Contoso Project Standard
Content Template from Employee Onboarding 2:15 PM	Contoso Project Lite
Content Template from Widget Blue Product 2:15 PM	Contoso New Product Idea
Content Template from Widget Green Product Update 2:13 PM	Contoso Product Update

Leverage a Variety of Business Process Flows & Forms

Project Template

Details

Form Configurator

Projects

Related

Details

Name

*

JW Demo-Project Structured

Description

Approvals Coordinator

*

AW

Anne Wallace (Offline)

Form Template

*

BrightWork 365 Project

Business Process Flow

*

BrightWork 365 Project

Configure and Customize **Templates** for Your Needs

Product Update - Saved

Project Template

Details

Form Configurator

Projects

Related ▾

⊕ Expand All

⊖ Collapse All

^ Charter

▾ Top

▾ Bottom

^ Status

▾ Schedule

▾ Indicators

^ Status Reports

▾ Status Reports

✓

✓

✓

✓

✓

✓

✓

✓

Questions





THANK YOU!



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Next Steps

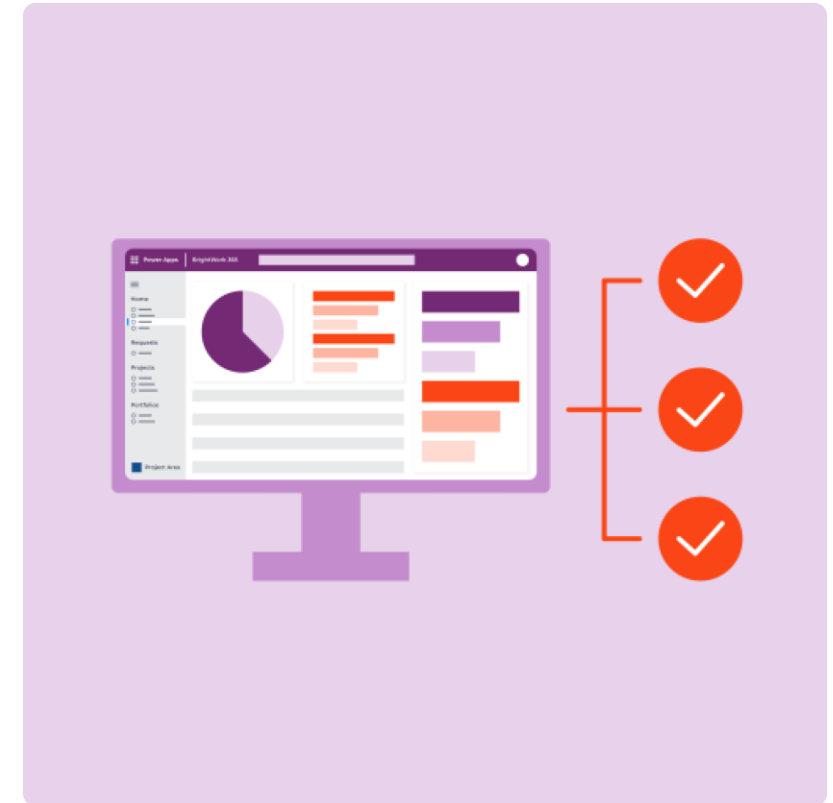
For discussion, more ideas and Q&A, contact us!



Adam Sheehan

Tel: +1 617 631 9825 or +353 91 412477

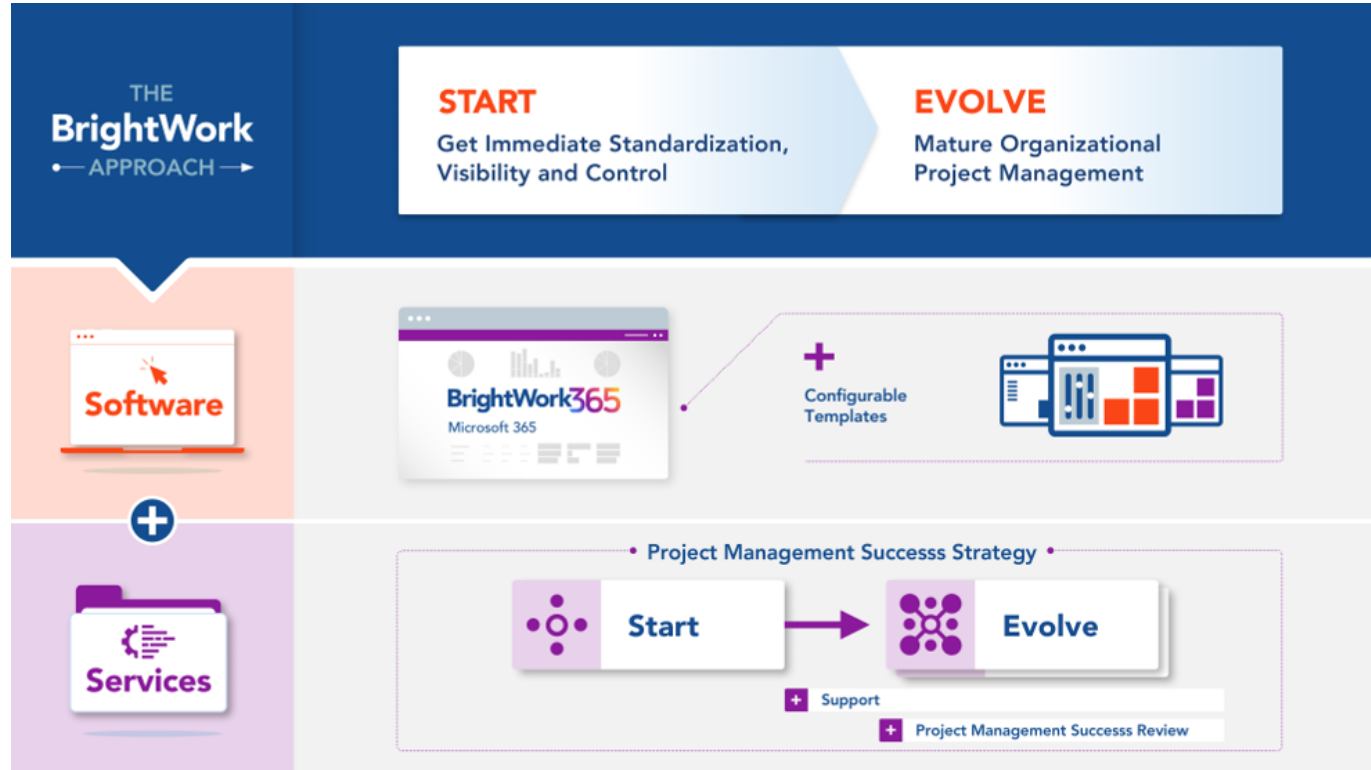
Email: asheehan@brightwork.com



Appendix



BrightWork Project Management Success Approach: Start-Evolve



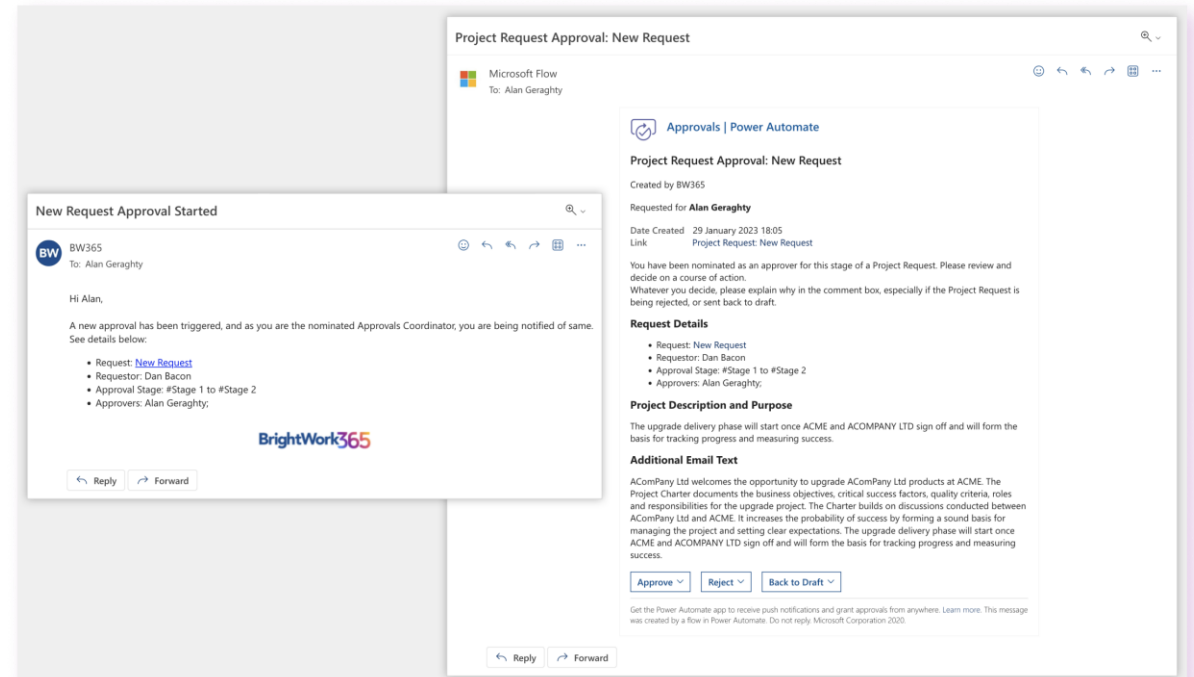
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- Software - with Configurable Templates
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- Personalized Services

1. Process New Project Requests

Streamline your project selection and approval process.

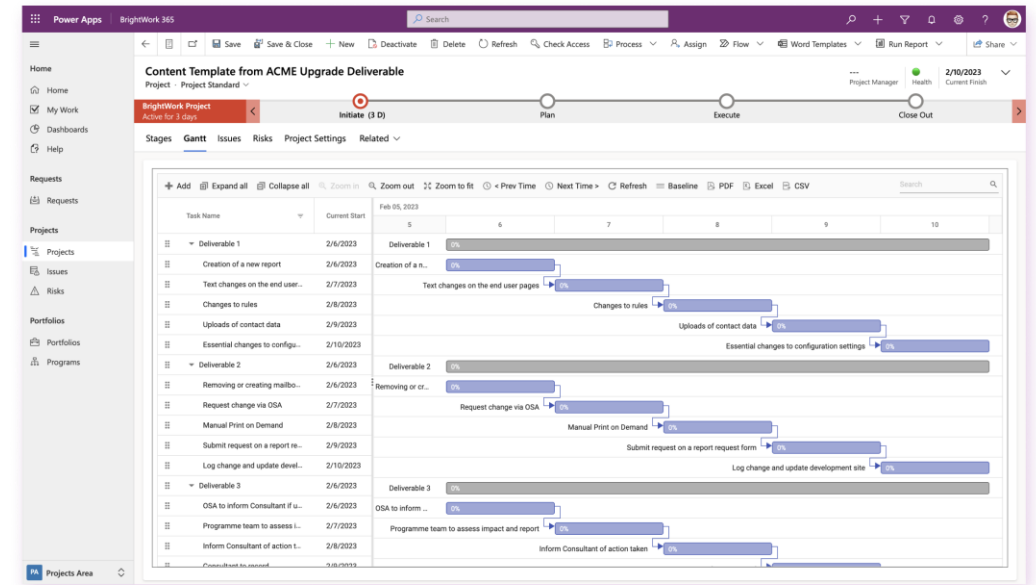
- Get ample visibility and control with BrightWork 365 Request dashboards
- Set up different stages where you can easily Draft, Accept, Approve Requests, and Create Project.
- Stay updated on actions taken on new project requests with automated notifications.
- Develop a consistent approach with configurable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



2. Manage Projects

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

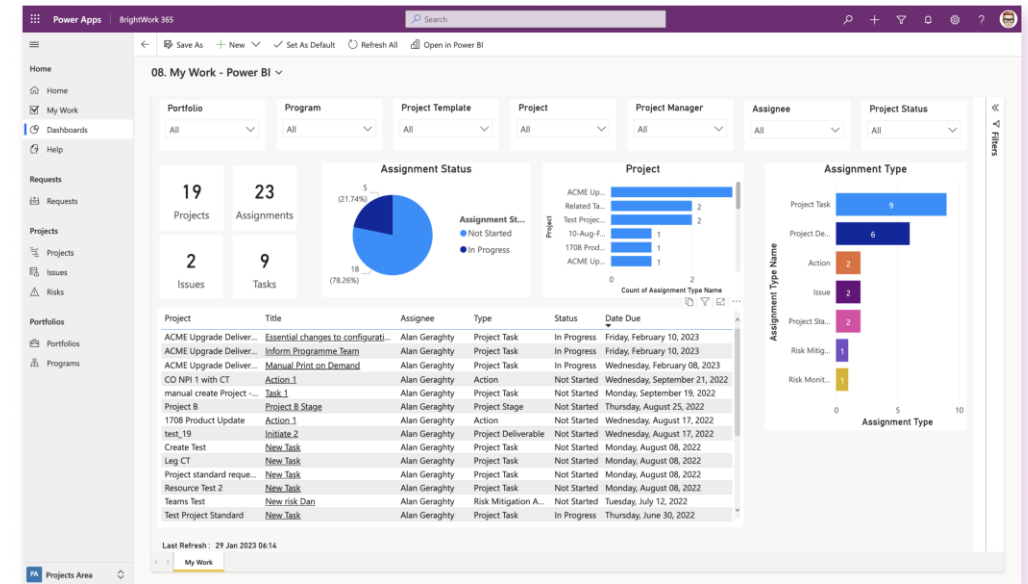
- Set up projects with ready-to-use templates and familiar Microsoft 365 apps.
- Automate key tasks with Power Automate-driven built-in workflows.
- Use Power Apps and Power BI dashboards with unique selectors to filter and analyze complex data.
- Collaborate and engage from anywhere using Microsoft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



3. Control Portfolios

Get full visibility of your projects and programs across portfolios.

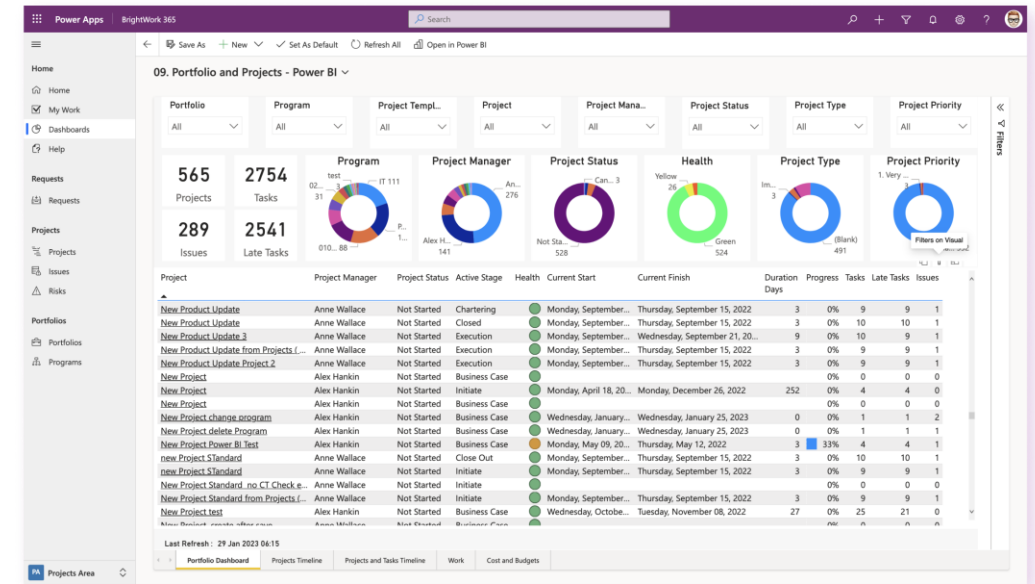
- Track the performance of your project portfolios with indicators for status, health, issues, and risks.
- Capture real-time data and customize it to create and share project performance reports in a few steps.
- Make data-backed business decisions with easy access to stats and performance.
- Create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



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.



5. Leverage Microsoft 365

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



Microsoft Teams



Power BI



Power Apps



Power Automate



SharePoint



Outlook



Word



Excel



PowerPoint



OneNote



Azure



Dataverse

BrightWork 365 Personalized Services

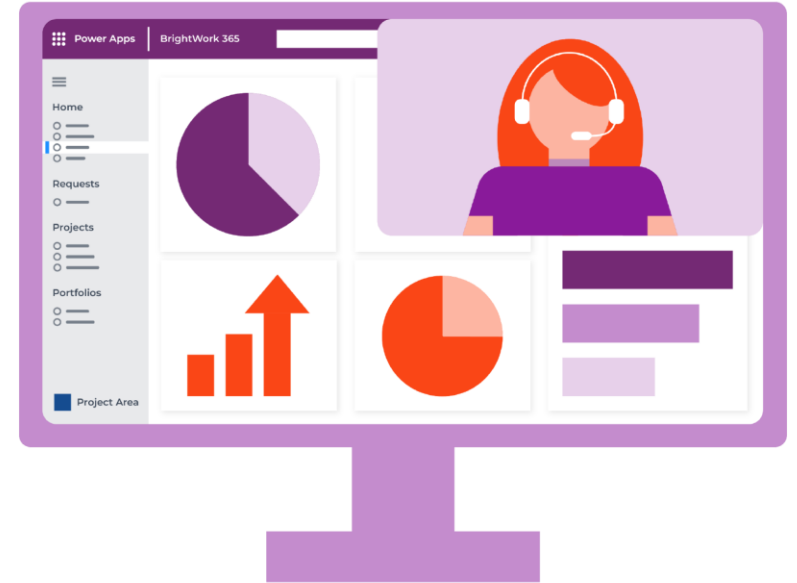
Continuous support in deployment, review, and strategy

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



BrightWork 365 Customer Success Stories

