



# Data Driven Efficiency:

## Optimizing Project Management with Power BI & Power Apps Dashboards



### **Presented By**

John Huber

BrightWork 365 Customer Success Partner

# Session Overview

1. Use Power App Dashboards to compile and consume your project data
2. Leverage Power BI Dashboards for project portfolio management.
3. Connecting your data to Power BI and Power Apps
4. Let's have Q&A!

# Quick Poll

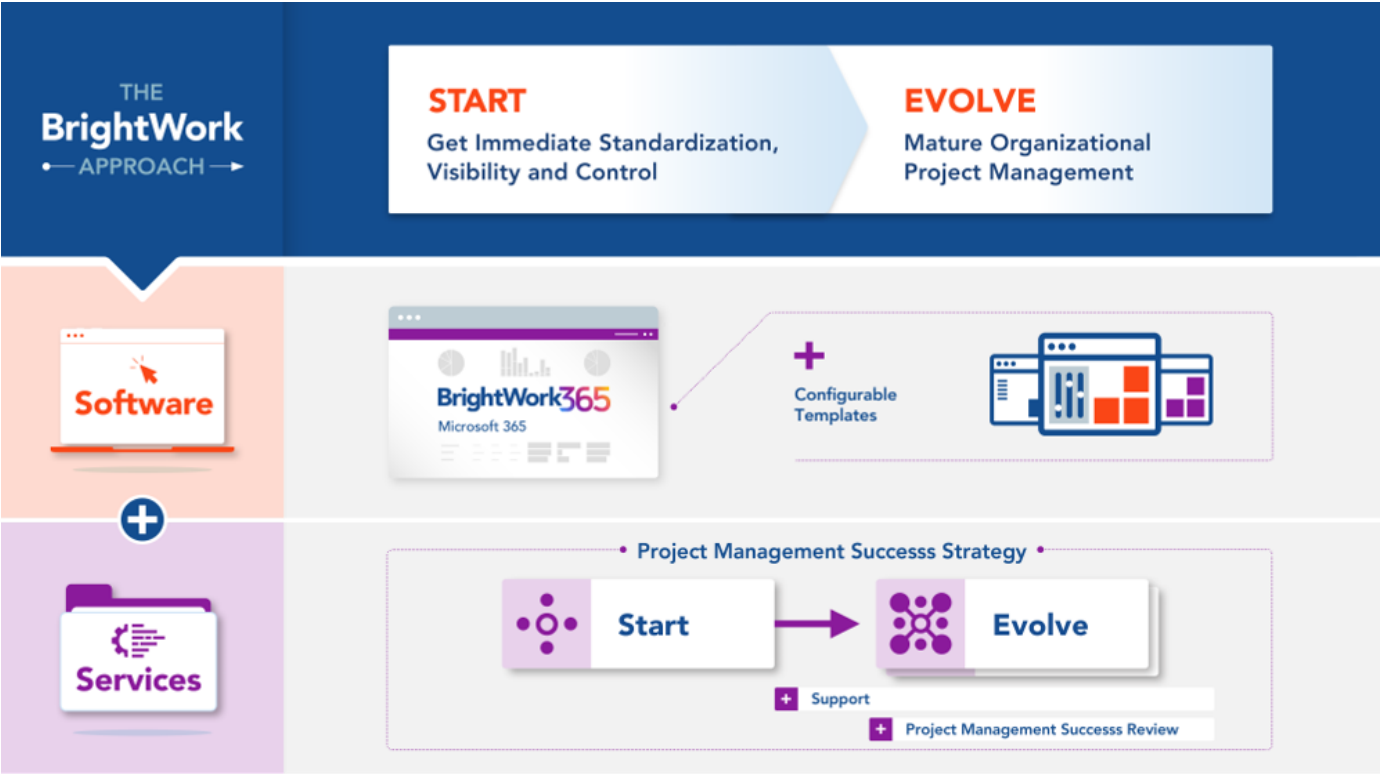
Why does your team wish to address Project and Portfolio Management in 2023?

# Introducing 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

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**DEMO** 

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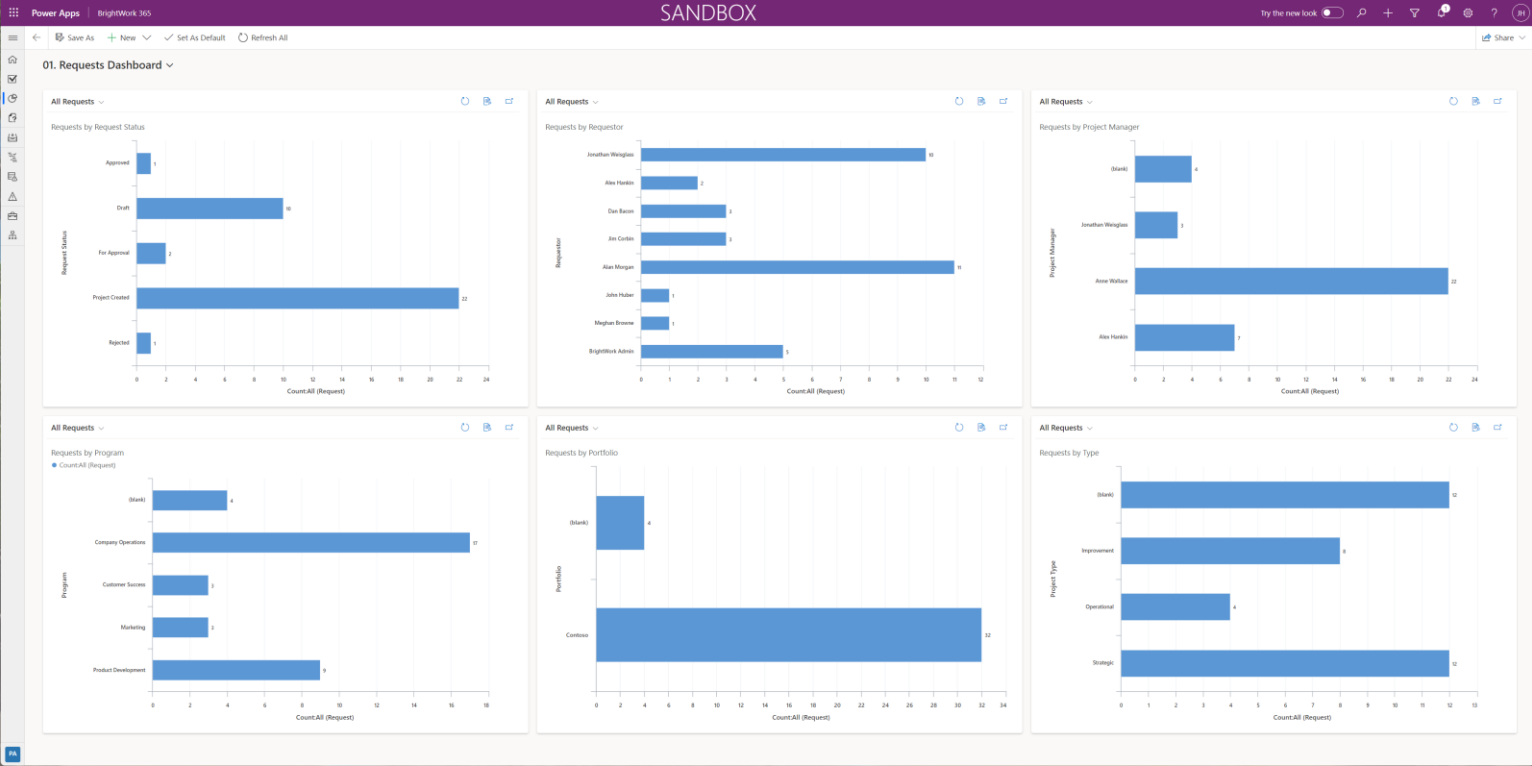
# Quick Poll

Does it look like BrightWork 365 might answer your Why?

# Power Apps Dashboards - Request and Project

Compare multiple request or project values in a single window. Drill into the details of any report. Change the report view by filtering on values.

Fully interactive dashboards allow users to view multiple request or project KPIs, then drill into the indicators to gain additional insights.

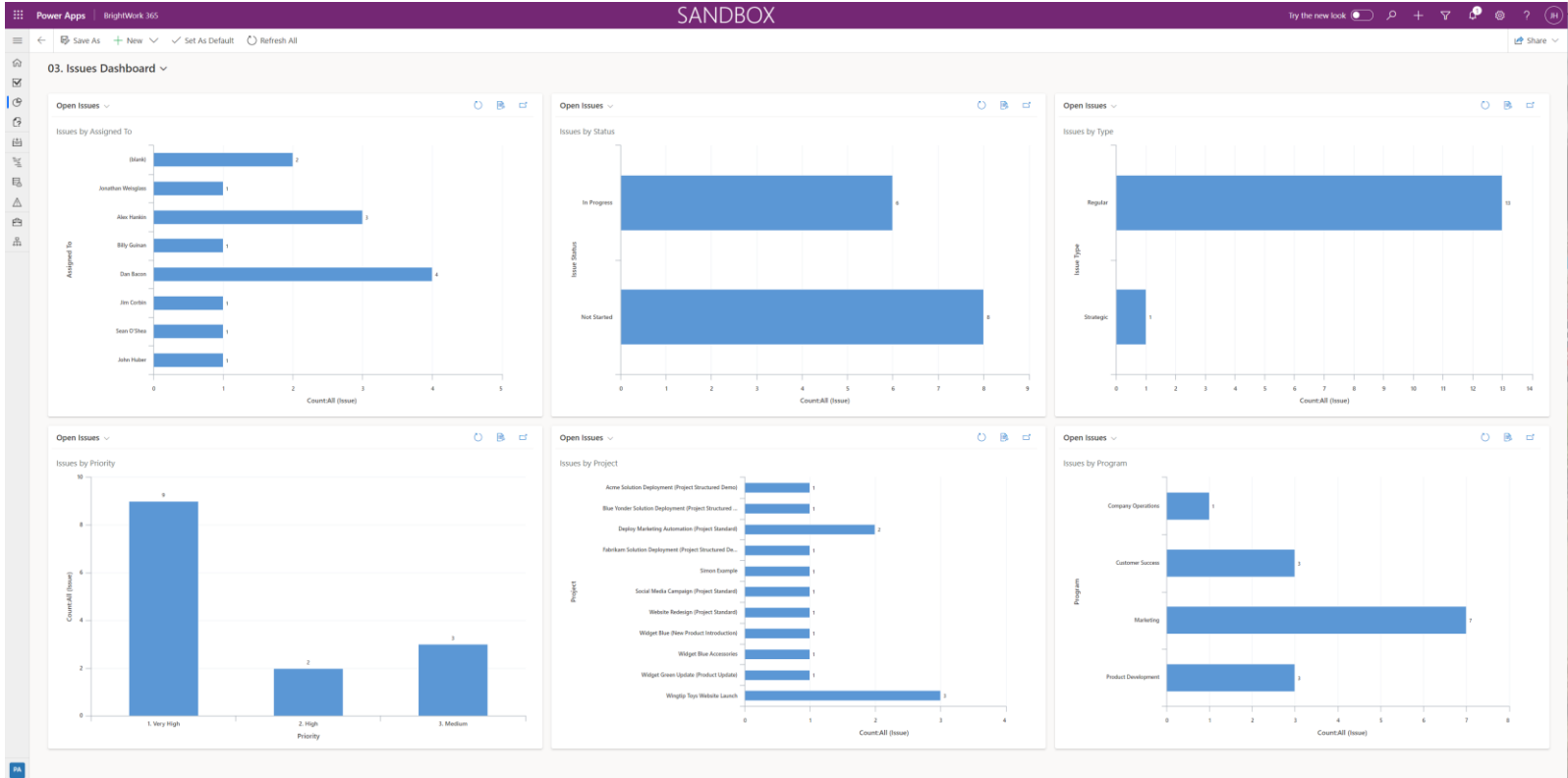




# Power Apps Dashboards - Issues, Risks, & Costs

Visualize issues and risks by specific indicators. Drill down with interactive filters to gain detailed insights.

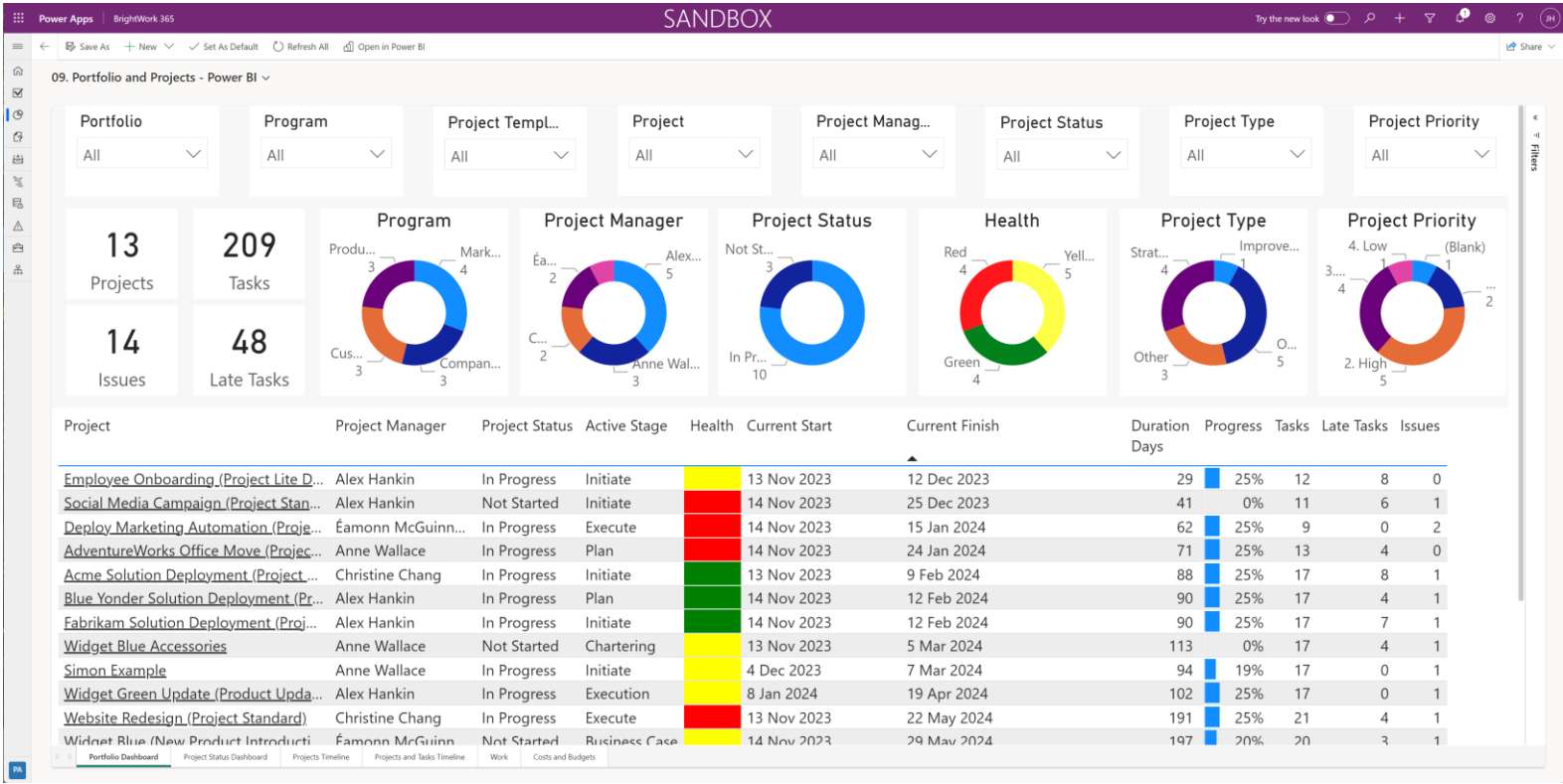
- Assignment
- Status
- Project, Program, Portfolio
- Issues by Type, Priority
- Risks by Escalation, Exposure



# Power BI Dashboards - My Work, Portfolio, Documents, Resourcing

**Power BI Dashboards deliver deep insights interactively.**

Expansive filtering and sorting capabilities allow stakeholders to gather and share detailed project insights. Controlling projects is simplified through interactive links directly to project components.



# Questions





# THANK YOU!



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# Next Steps

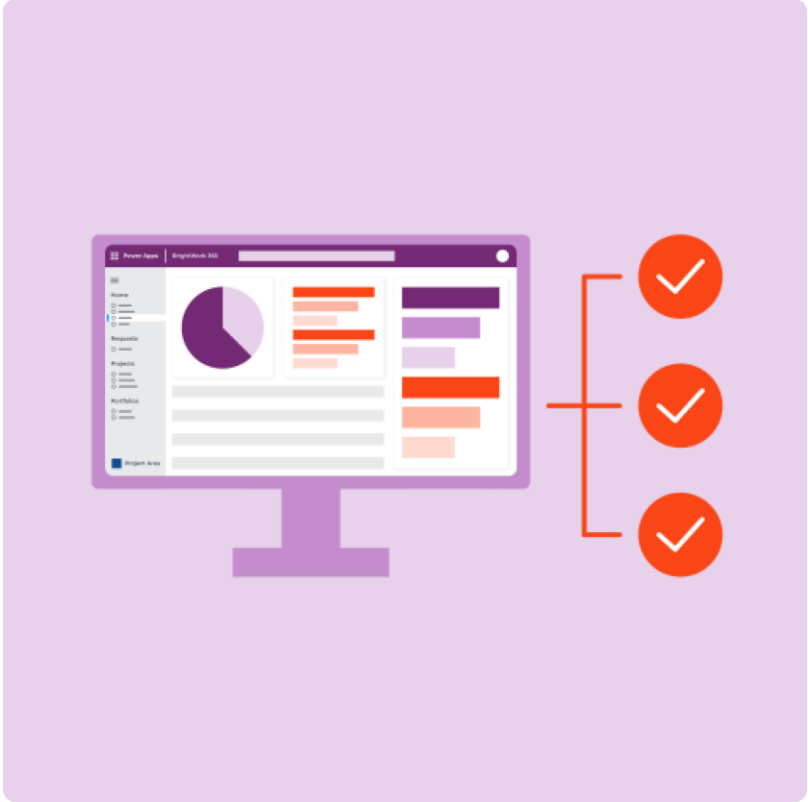
For discussion, more ideas and Q&A, contact us!



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# Appendix



# BrightWork Project Management Success Approach: Start-Evolve



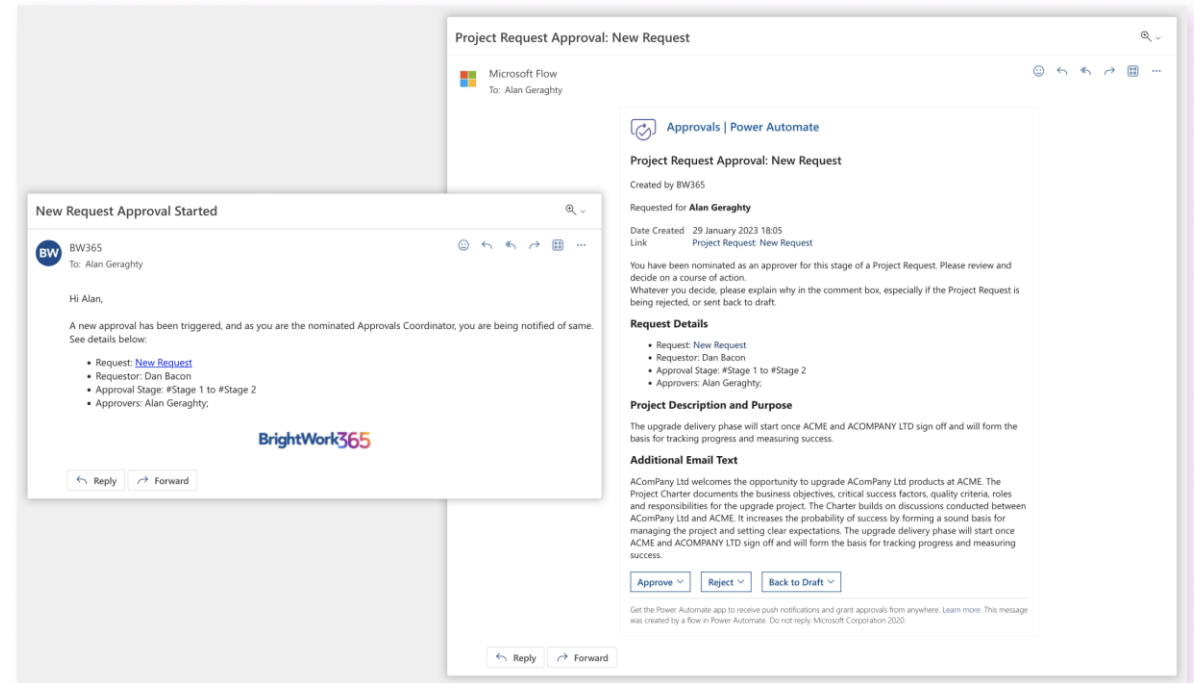
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# 1. Process New Project Requests

## 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.

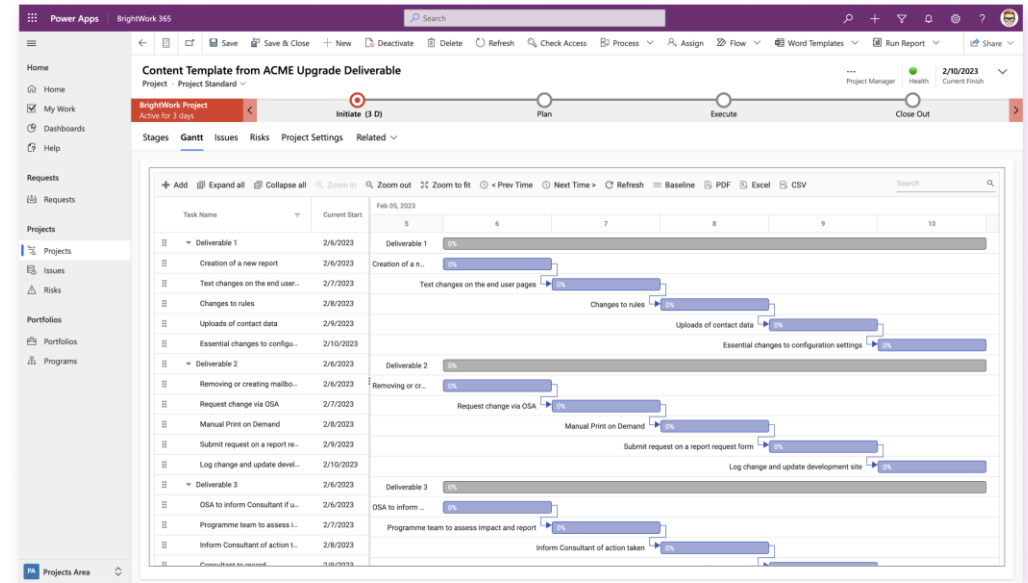




## 2. Manage Projects

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

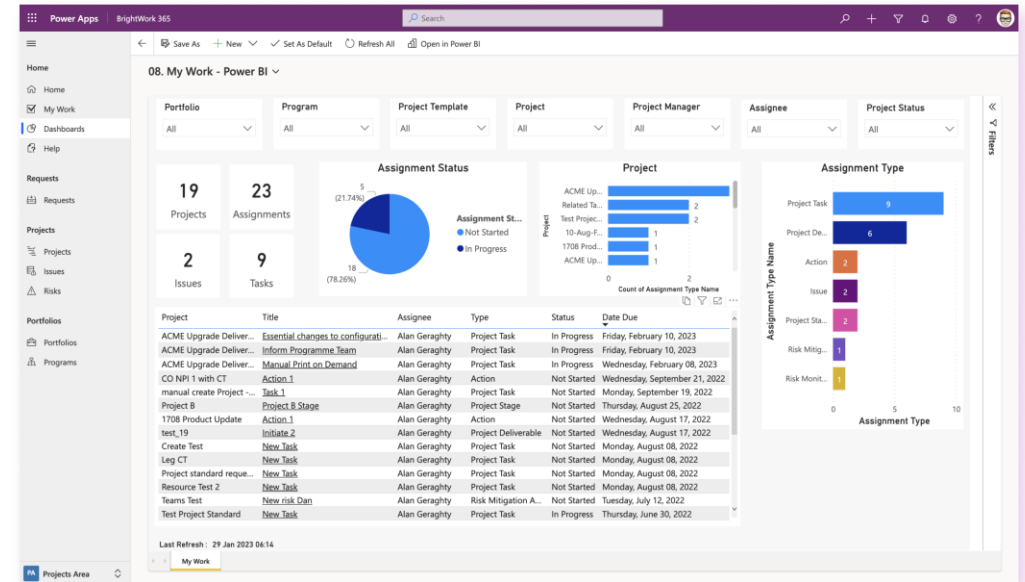
- Set up projects with ready-to-use templates and familiar Microsoft 365 apps.
- Automate key tasks with Power Automate-driven built-in workflows.
- Use Power Apps and Power BI dashboards with unique selectors to filter and analyze complex data.
- Collaborate and engage from anywhere using Microsoft 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.

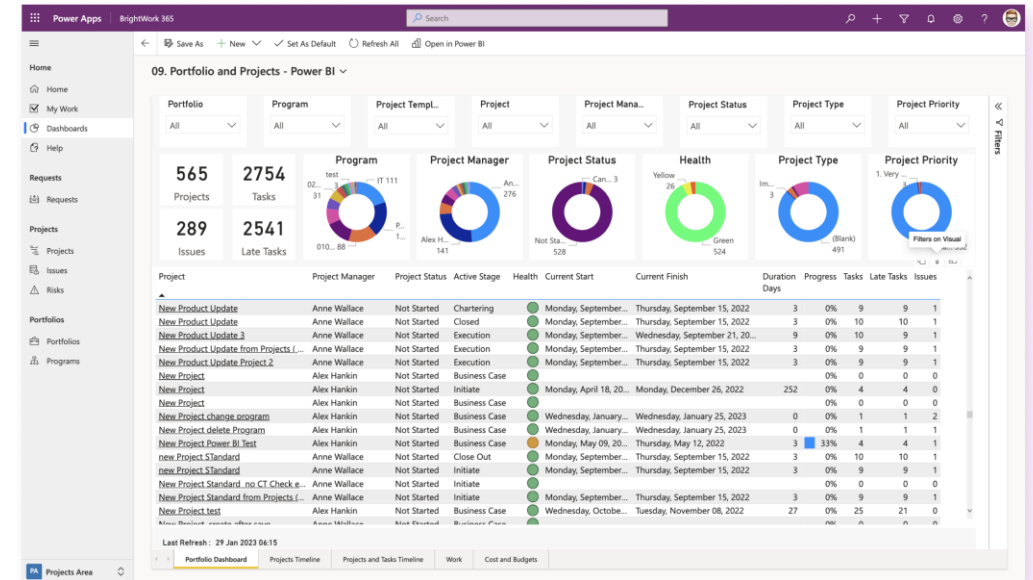
- Track the performance of your project portfolios with indicators for status, health, issues, and risks.
- Capture real-time data and customize it to create and share project performance reports in a few steps.
- Make data-backed business decisions with easy access to stats and performance.
- Create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

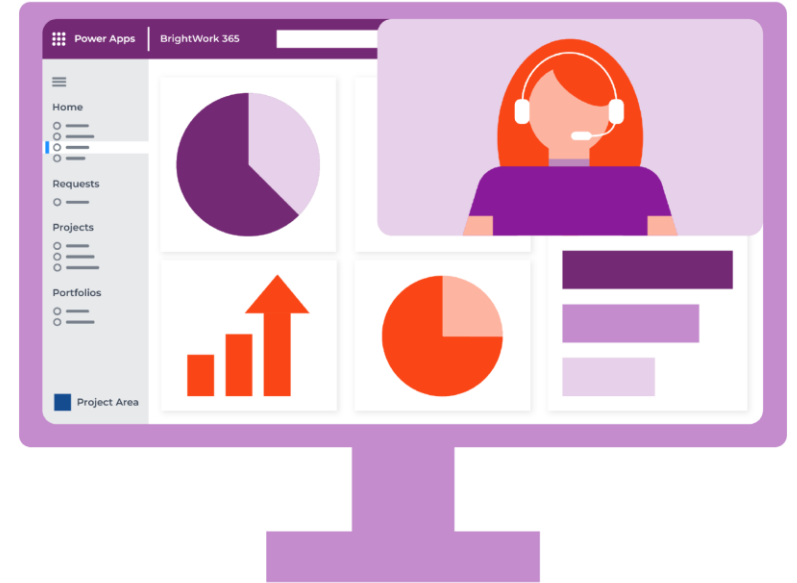
## Continuous support in deployment, review, and strategy

### 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

