

BrightWork365

Standardize Project Management Processes with Templates for Microsoft 365

What's New in BrightWork 365

Presented by



Éamonn McGuinness
CEO
BrightWork



Micheál Clesham
Inbound Marketing
BrightWork



Scott Footlik
V.P. of Customer Success
BrightWork

Today's Topic: Standardize Project Management Processes with Templates for Microsoft 365

1. What we've learned about Project Management in 2022 {Scott}
 2. How to Respond in 2023 – and How BrightWork 365 (latest release) can help {Éamonn}
 3. Live Questions and Answers {Micheál, Éamonn and Scott}
-

Top 3 Learnings about Project Management in 2022

- Remote and hybrid working is here to stay – and hence a need for greater team collaboration and management visibility.
- Different projects and project teams require differing amounts of Project Management.
- Organizations don't have time for long, extended Project Management system implementation. Control is needed now!



QUICK POLL

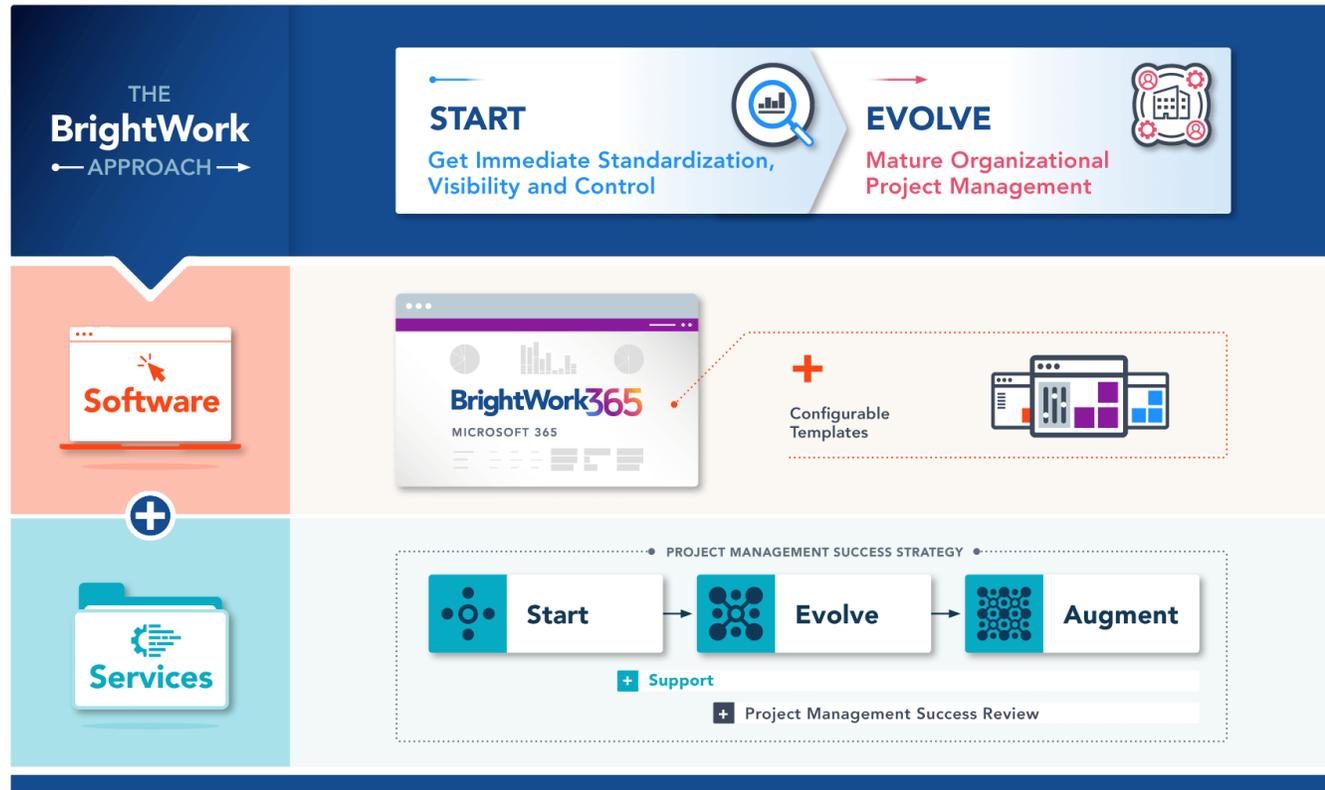
Why does your team wish to address Project and Portfolio Management in 2023?

Our BrightWork 365 Approach

START

Start quickly by adopting a reasonable amount of project management on all of your projects.

Give your senior leadership the visibility to exercise control over the entire portfolio of projects.



Evolve

Add and mature your project management processes at a pace your group can absorb.

This leads to more predictable and timely outcomes for your entire portfolio of projects.

BrightWork 365 for Microsoft 365

The "What"

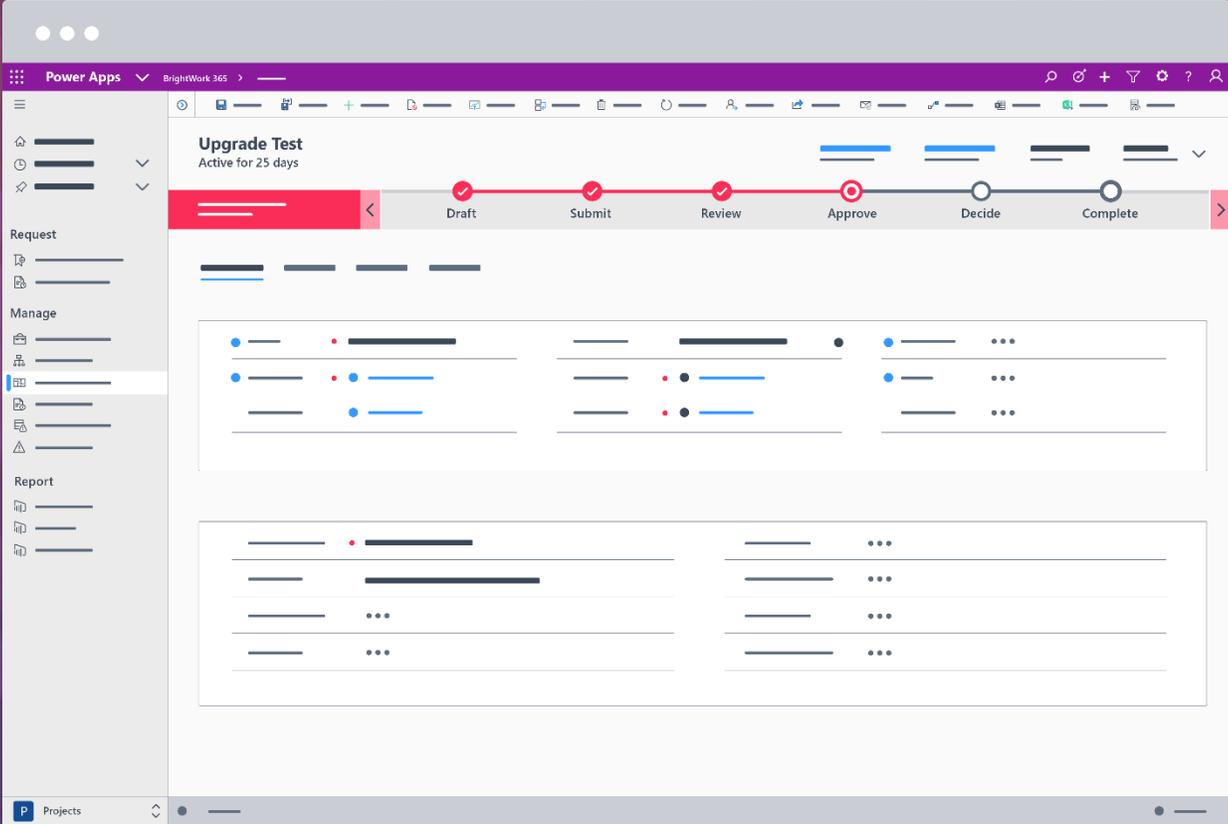


The "How"

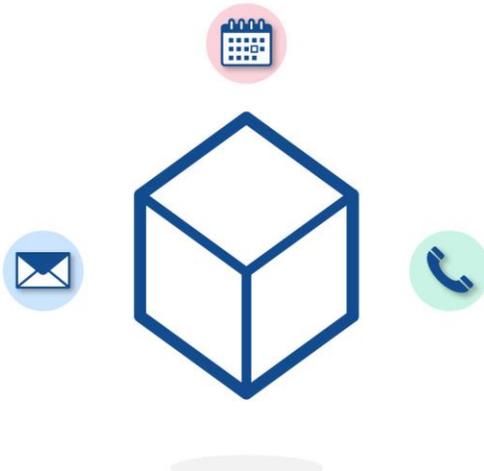


DEMO

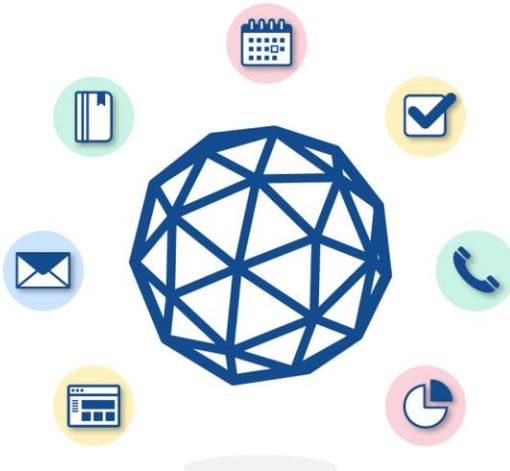
Project and Portfolio Management



More "How"



START
 Deliver Immediate
 Visibility & Control

EVOLVE
 Grow Organisational
 Project Management

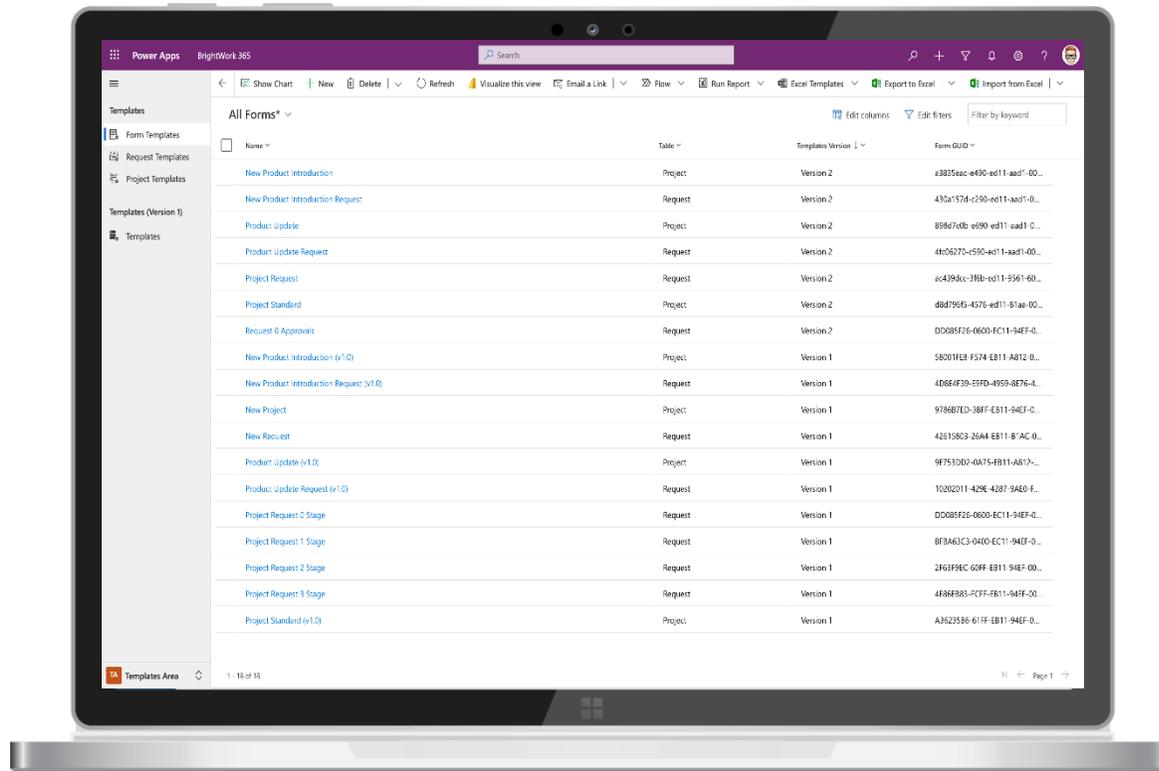
The BrightWork Approach

Built into our Product with Templates

and

Designed into our Deployment Approach with Services

Templates Area



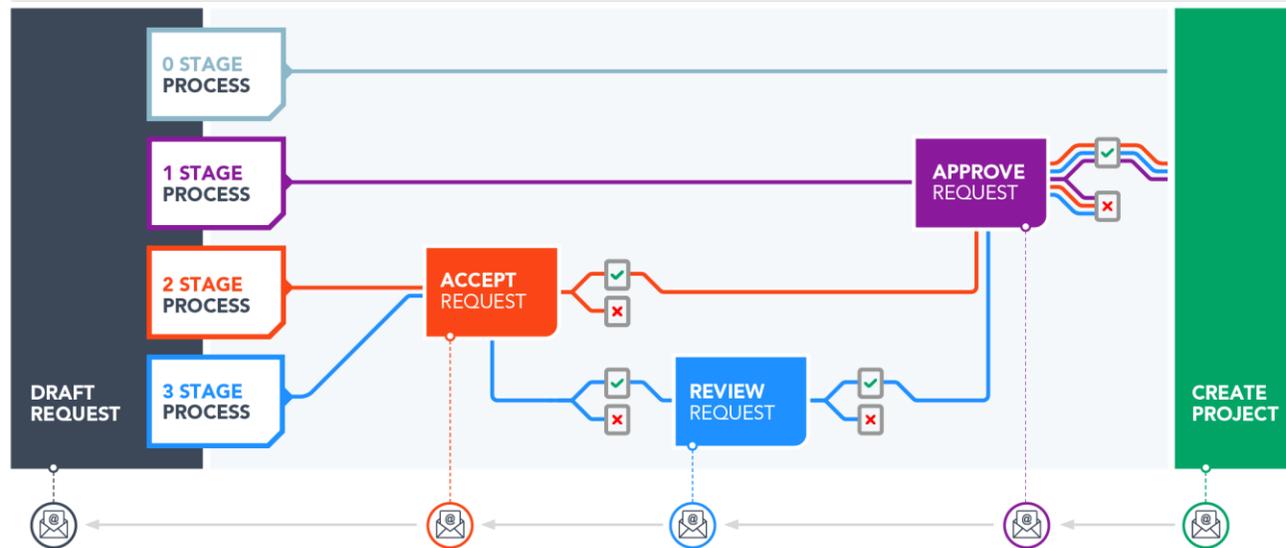
Start your projects quickly with built-in templates from the Templates Area.

Evolve your processes by customizing them to suit the needs of your matured projects and your project management success plan.

Project Requests

BrightWork365

Project Request Process Flow Diagram



Start with a simple 4-stage process

- Draft,
- Accept,
- Approve,
- Create Project

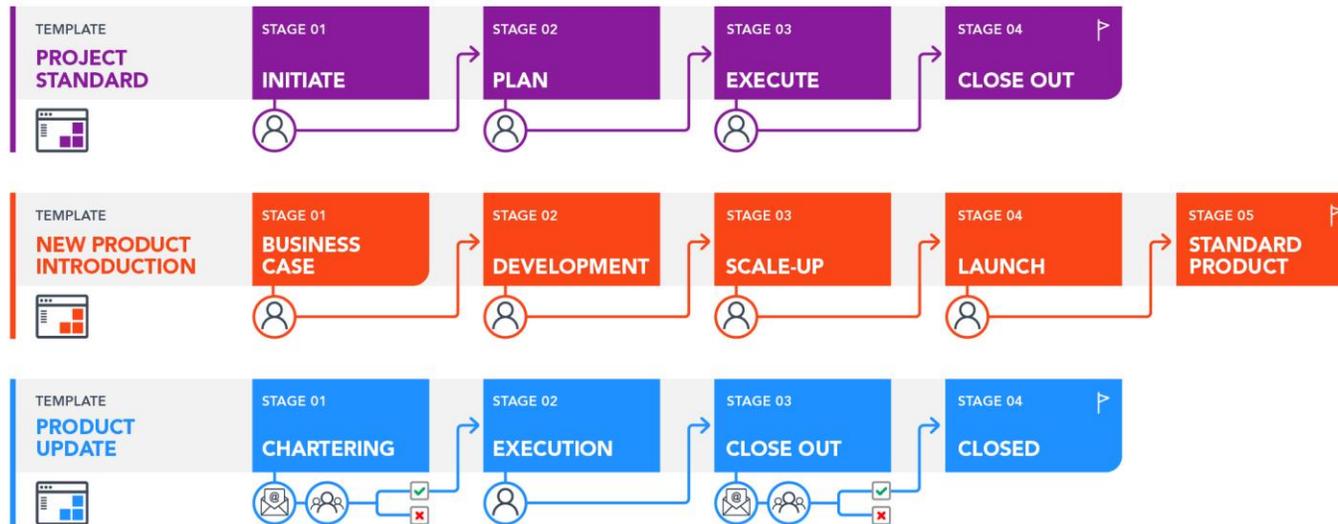
The Request dashboard gives ample visibility and a unique control for managing new project requests.

Evolve your request management with different forms and request templates.

Project Templates

BrightWork365

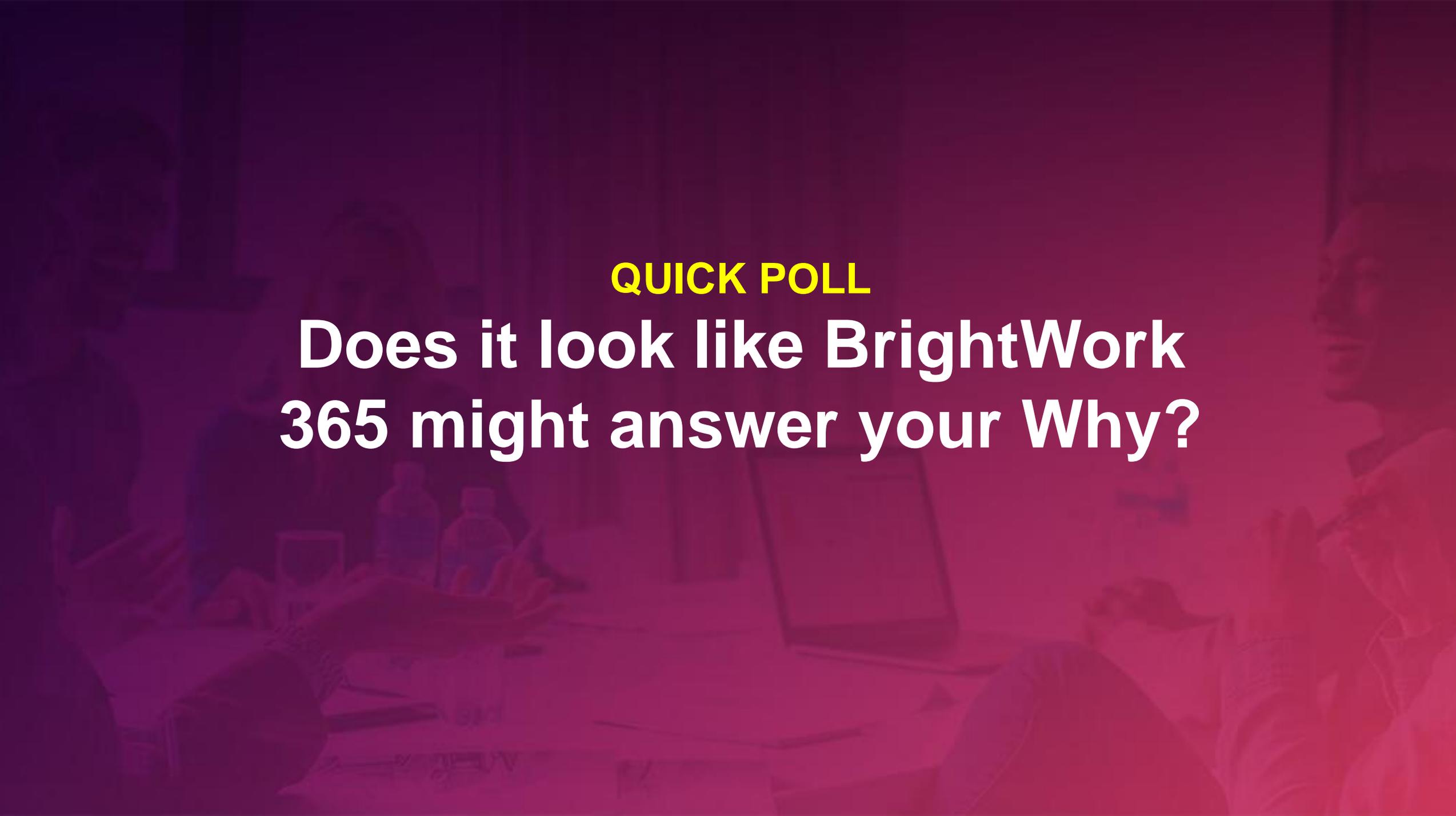
Project Stage Business Process Flow



Start with three pre-built templates as per the maturity stage of your projects.

Define project workflows and standardize processes for your teams by choosing the right templates for each project.

Evolve your templates based on your project management success strategy.



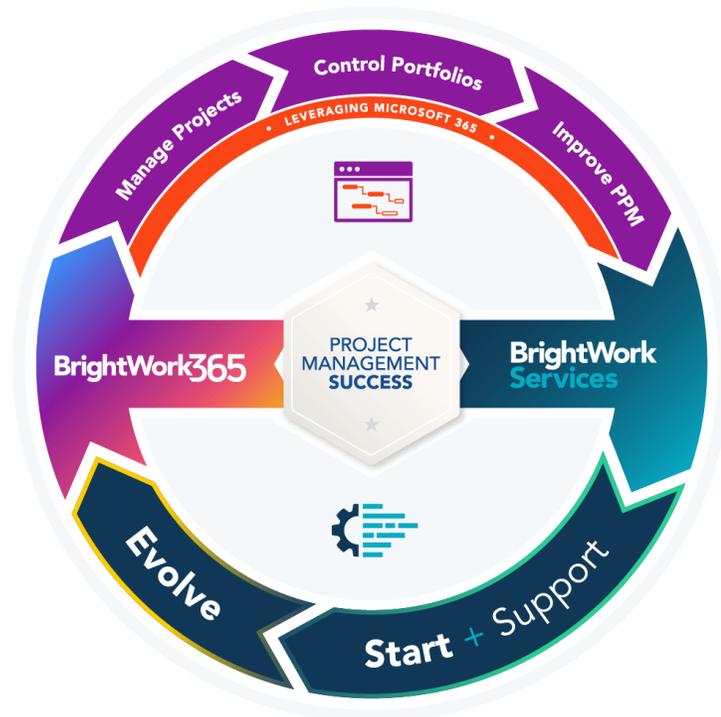
QUICK POLL

**Does it look like BrightWork
365 might answer your Why?**

QUESTIONS?

➤ Use the Question panel to ask questions

Upgrading to BrightWork 365



[Contact Customer Success](#)

Our approach to upgrading your BrightWork 365 solution includes:

- A pre-evaluation of your Microsoft 365 solution to facilitate a smooth upgrade process.
- Providing on-hand technical assistance during the upgrade process.
- Updating any processes to leverage and new features of the latest release.

A member of our technical team will work with your Microsoft 365 administration team to upgrade your tenant to the latest version of BrightWork 365.

They will confirm the solution upgrade and answer any post-upgrade questions you may have.

THANK YOU



Adam Sheehan

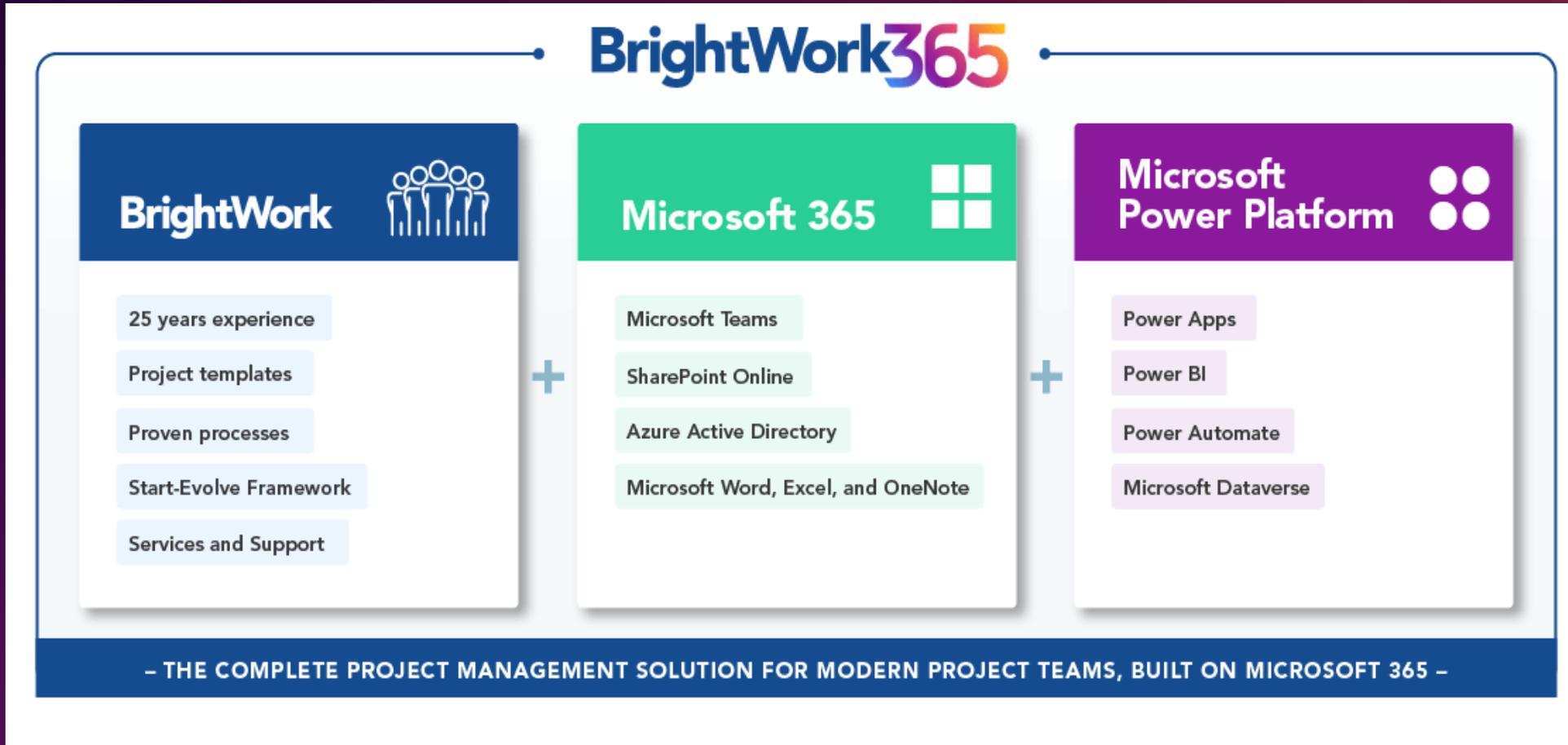
Tel: +1 617 631 9825

+353 91 412741

Email: asheehan@brightwork.com

Our mission is to

Make Project and Portfolio
Management with Microsoft
SharePoint and Microsoft 365
easier for our customers.



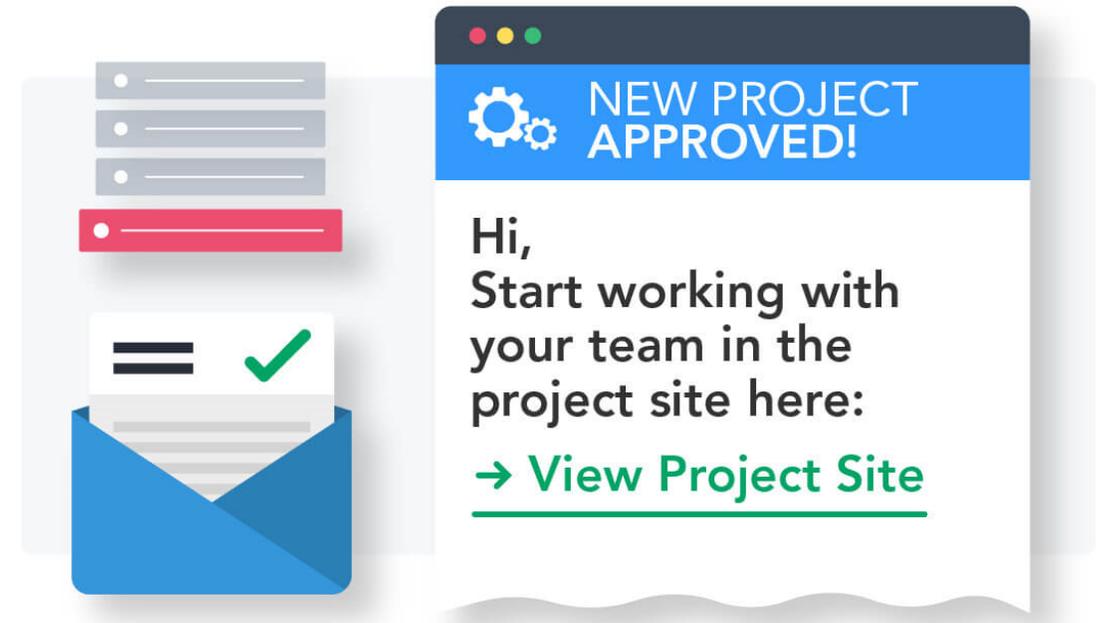
Introducing BrightWork 365 for Microsoft 365

- A Project Management Solution built for Microsoft 365.
 - Process Requests for new Projects
 - Manage Projects
 - Control Portfolios and Programs
- Uses the best of Microsoft 365 in a fully configurable solution.
 - Integrates with the Power Platform (Power Apps, Power Automate & Power BI), Microsoft Teams, Azure Active Directory, Word, Excel, OneNote etc. and SharePoint Online
 - [BrightWork 365 Product page](#)
- We are happy to assist with your deployment as needed.
 - [BrightWork 365 Deployment page](#)



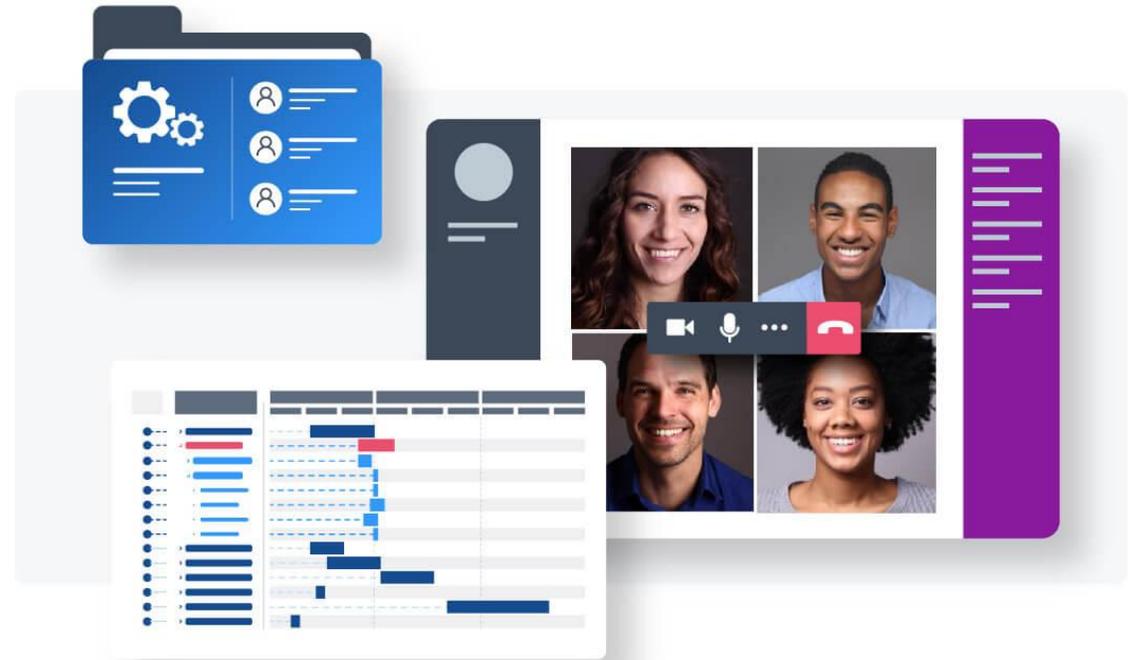
Project Requests

- Capture and manage new ideas from anyone in your organization in one solution.
- Improve project governance by approving and resourcing the right projects to support strategic goals.
- Get visibility into the project pipeline to inform business planning.
- Provide clarity about the objectives of the project to help project teams reach their goals.
- Streamline the decision process to get a fast start on key projects.



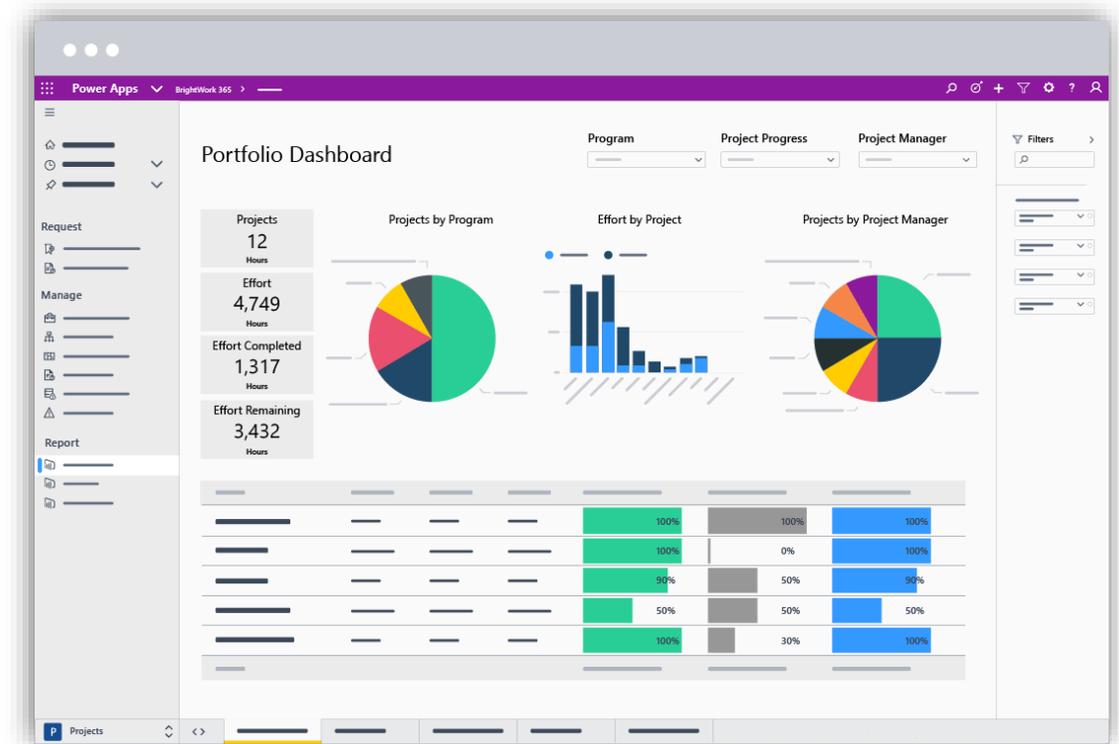
Manage Projects

- Save time during project setup with templates and stages.
- Streamline project set up by using the Microsoft 365 apps you are familiar with in one app.
- Improve project quality with stage gates, providing in-built checks at every project phase.
- Save time and reduce errors with automation.
- Ensure stakeholder satisfaction with a clear project charter, including acceptance criteria for deliverables.



Manage Portfolios

- See how portfolios are performing with at-a-glance, real-time reports.
- Take action quickly to address issues and keep projects on track.
- Visualize project data with interactive reports to understand complex information quickly.
- Reclaim lost time with fewer meetings and lengthy email chains.



DEPLOYMENT SERVICES

- Your dedicated Customer Success Partner is with you at every step.
- The BrightWork 365 Start Service is based on our 3D Deployment (Design, Deliver, Deploy) approach.



BrightWork Customer Success stories

