



Get Visibility With Project Management Templates for Microsoft 365



Presented By

Éamonn McGuinness

BrightWork 365 Product Manager

Session Overview

1. Project management templates to get any project started instantly.
2. How to manage project tasks with Gantt and work reports
3. Easily configure your BW365 for the way you manage projects.
4. Let's have Q&A!

Quick Poll

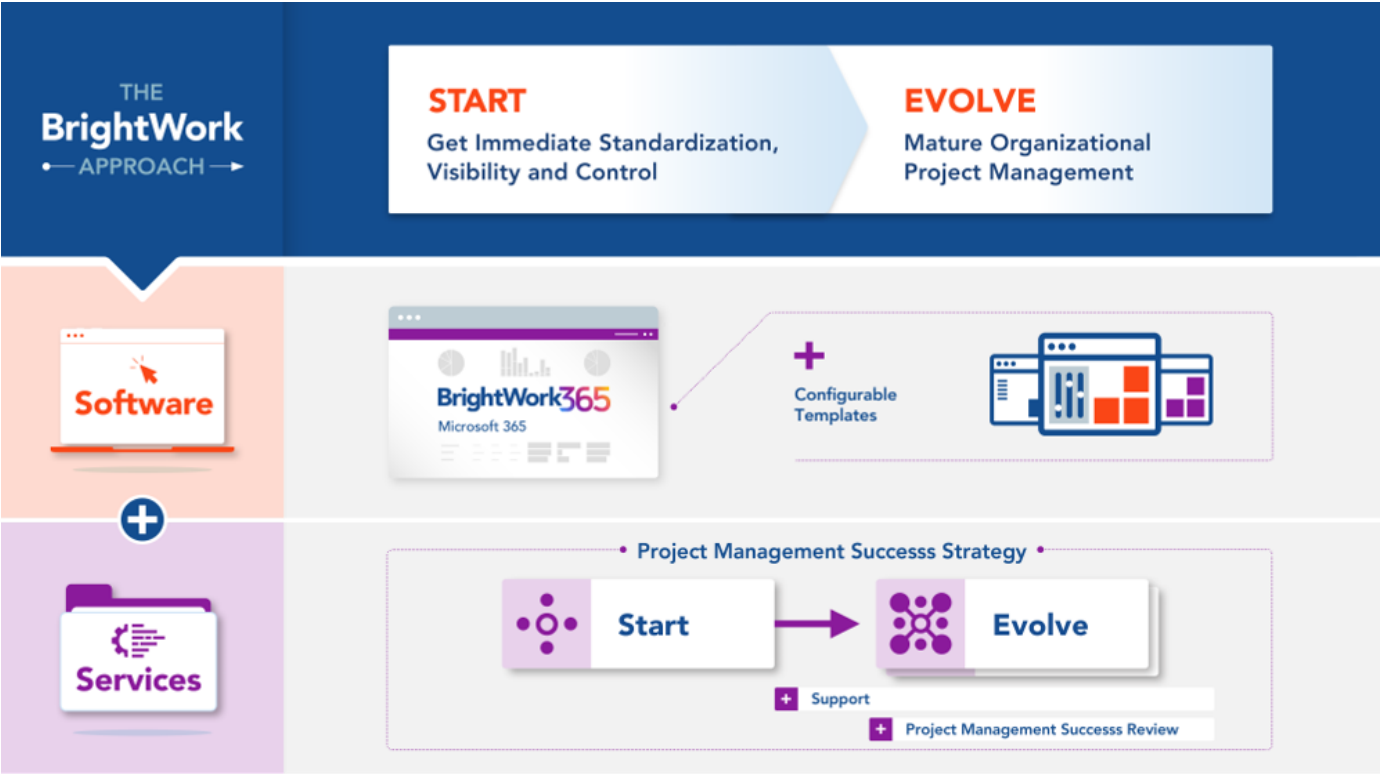
Why does your team wish to address Project and Portfolio Management in 2023?

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

BrightWork365

DEMO 

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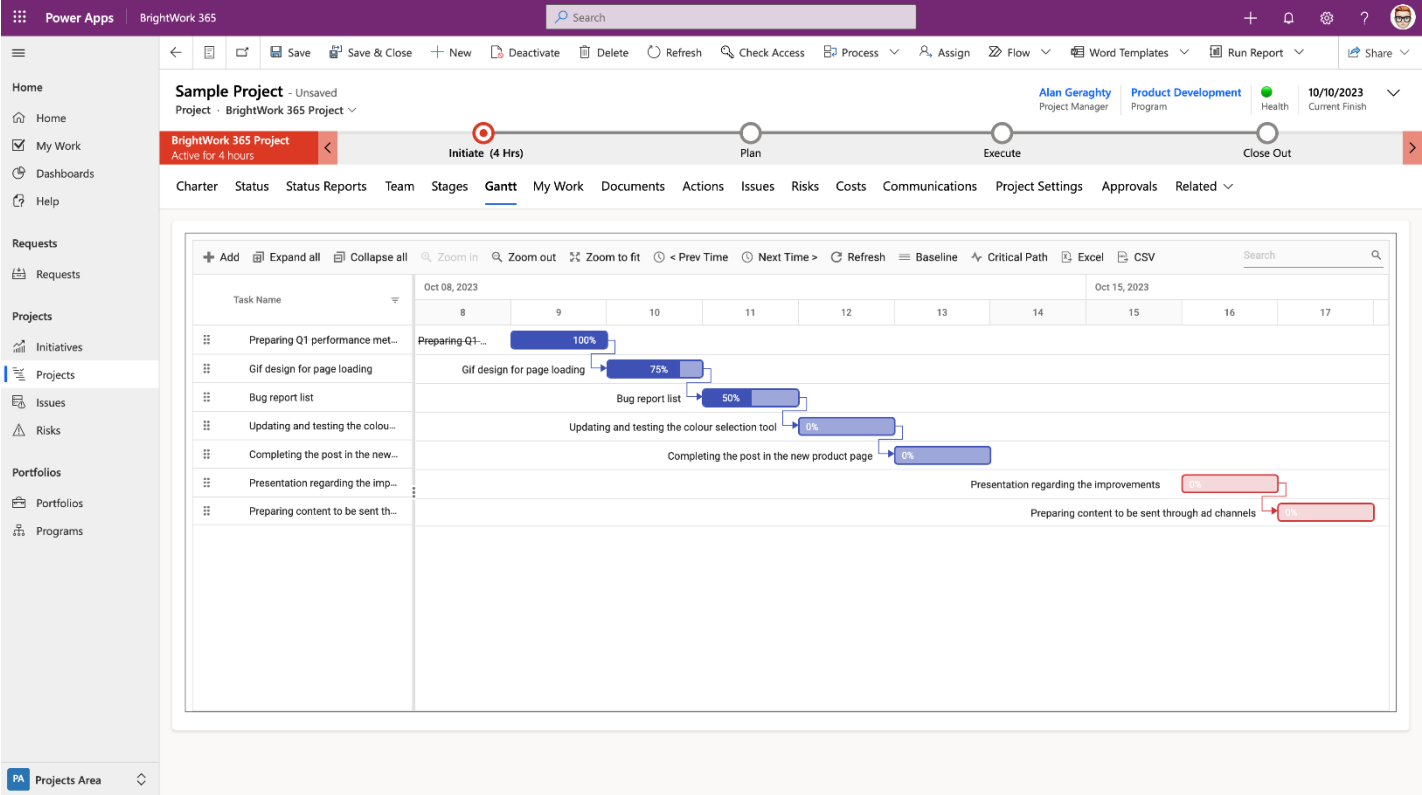
Quick Poll

Does it look like BrightWork 365 might answer your Why?

Gantt Chart - Critical Path

With the click of a button, display the longest sequence of tasks to be finished on schedule to complete the entire project on time.

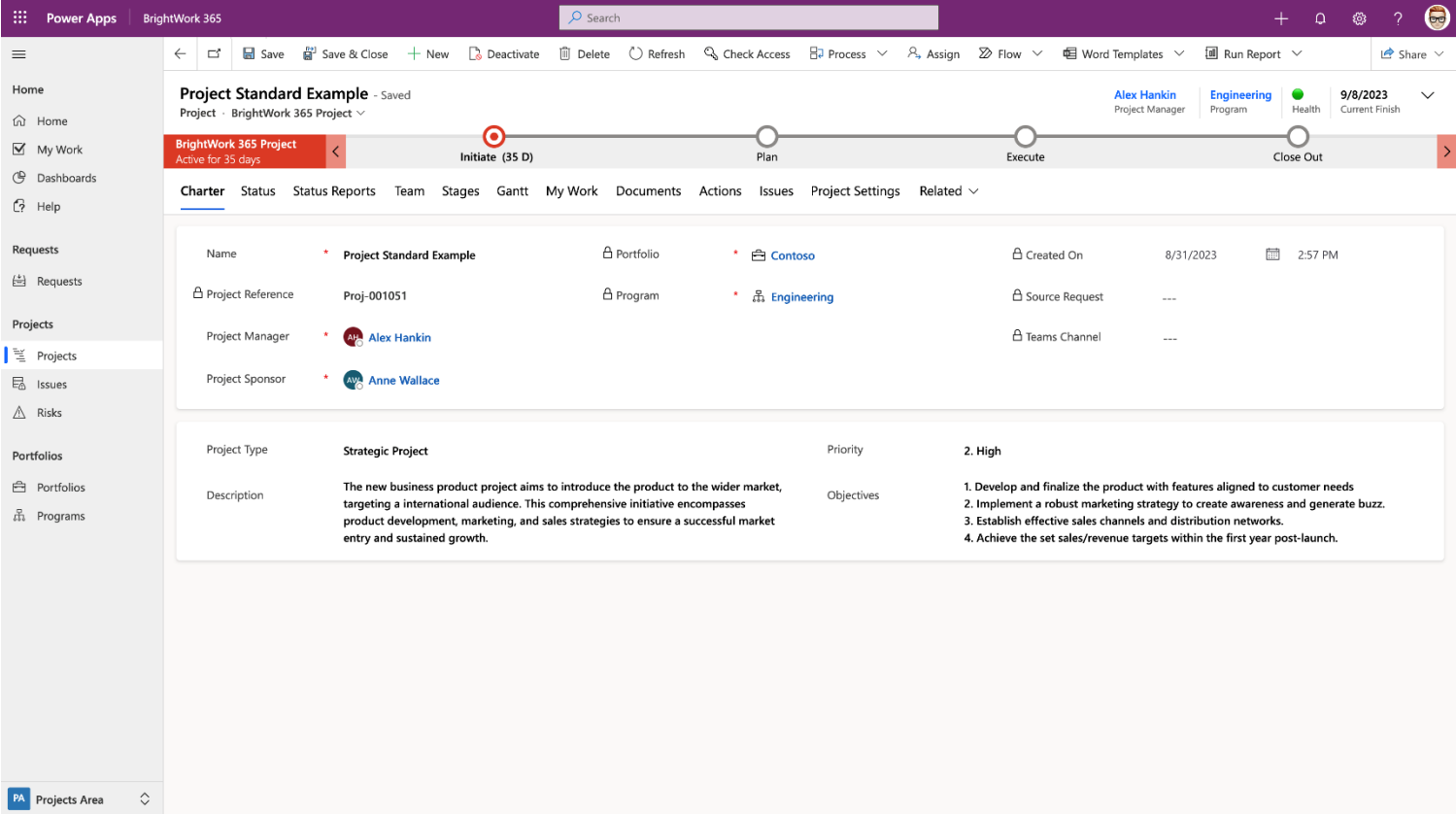
Gantt Task Unit % values can now be set by Team Members and Project Managers to something other than 100% so that project managers can more realistically track resource utilization.



Project Management Templates

BrightWork 365 comes with five starter project templates to help you get started managing projects quickly.

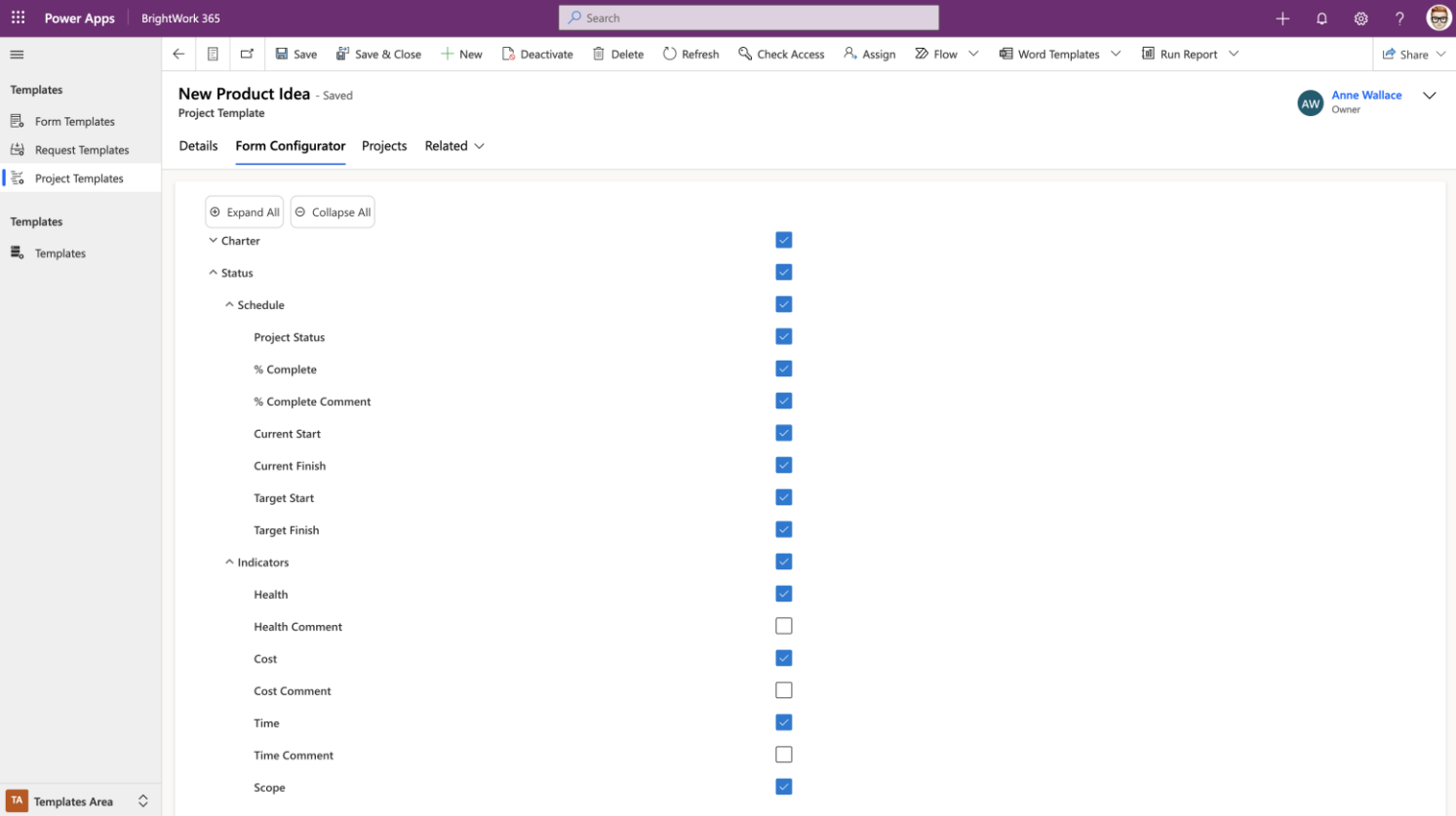
- Project Light
- Project Standard
- Project Structured
- New Product Idea
- Product Update



Form Configurator

The Form Configurator allows users to adjust the amount of process in projects, and to better focus on the most relevant project elements.

Template Editors have the ability to hide or show Project Template Form Tabs, Sections, and Columns with point and click ease.



Questions



THANK YOU!



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Microsoft Project Management Consultant

Next Steps

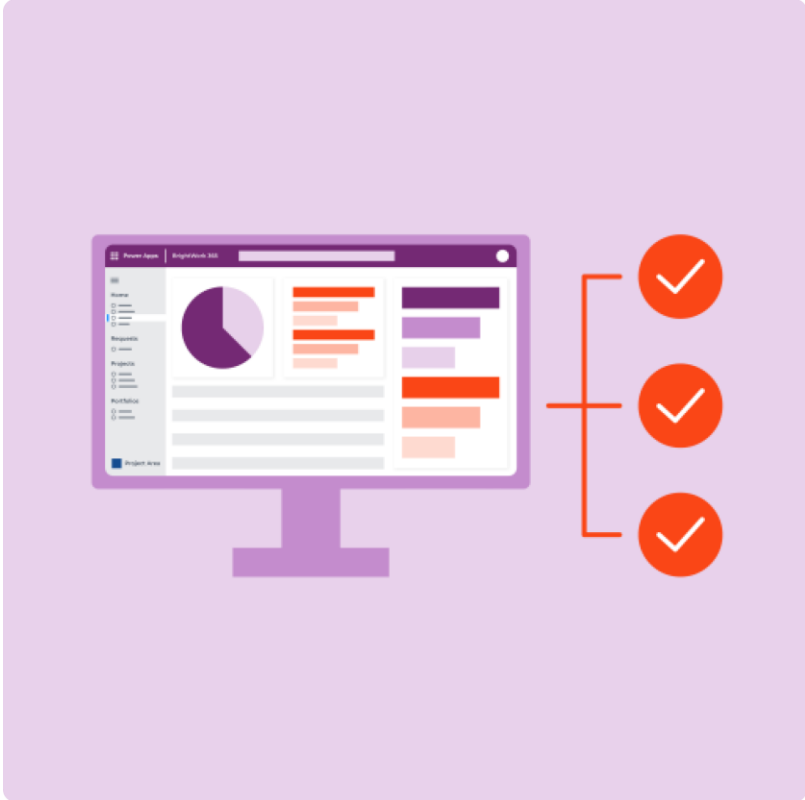
For discussion, more ideas and Q&A, contact us!



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Appendix



BrightWork Project Management Success Approach: Start-Evolve



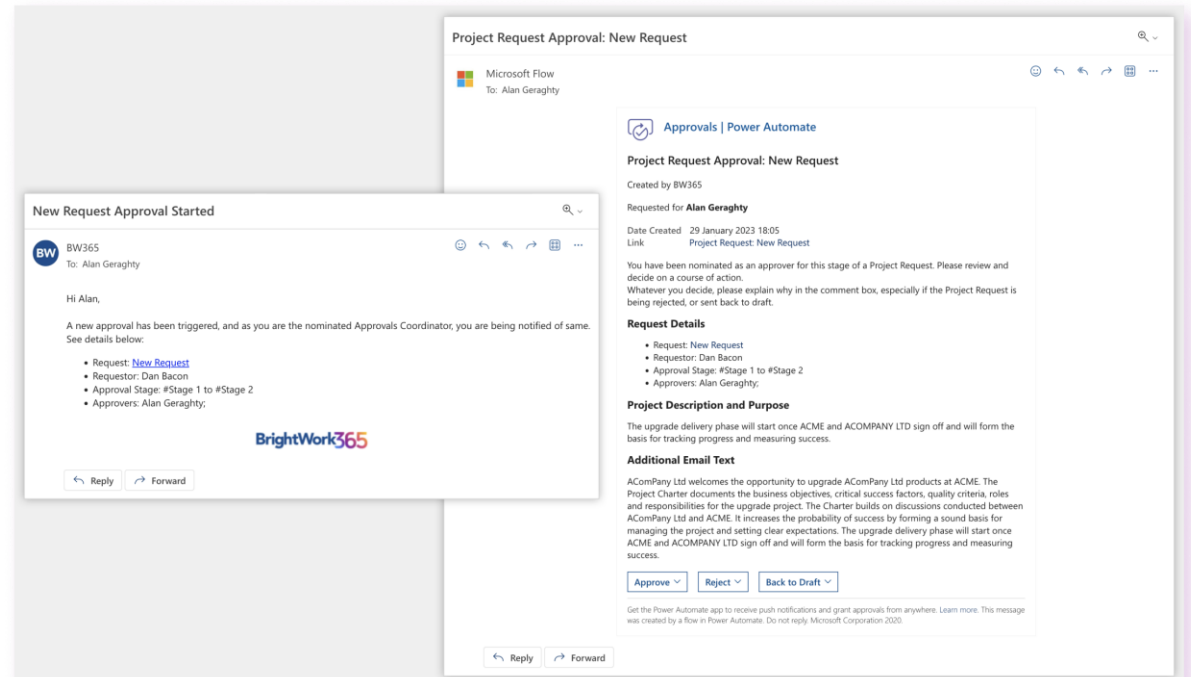
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1. Process New Project Requests

Streamline your project selection and approval process.

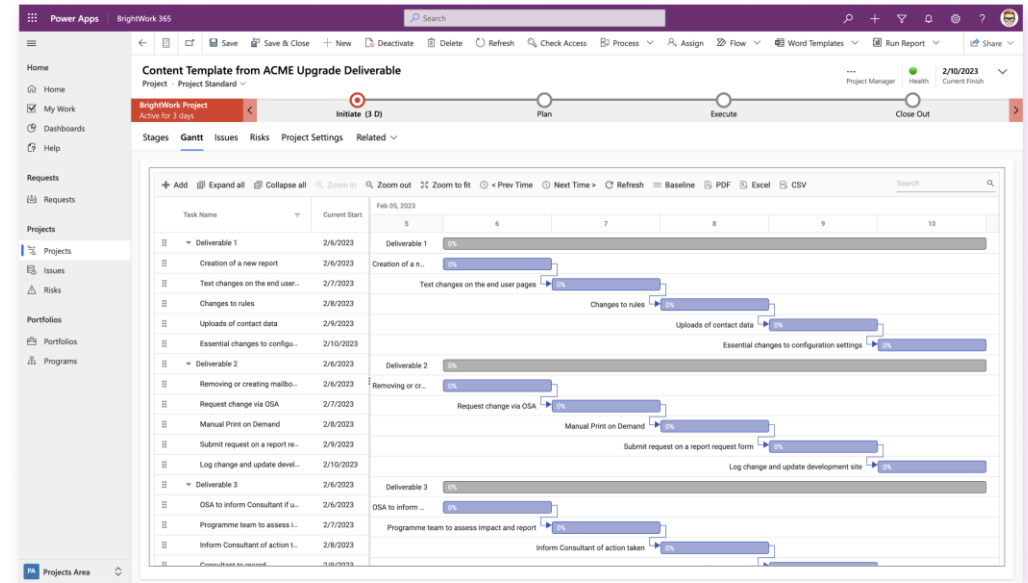
- Get ample visibility and control with BrightWork 365 Request dashboards
- Set up different stages where you can easily Draft, Accept, Approve Requests, and Create Project.
- Stay updated on actions taken on new project requests with automated notifications.
- Develop a consistent approach with configurable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



2. Manage Projects

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

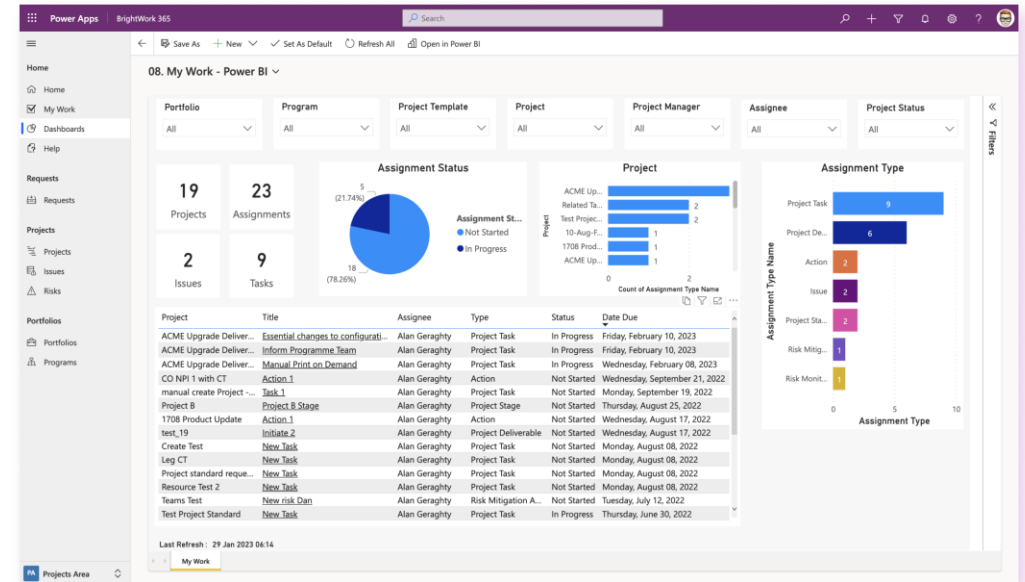
- Set up projects with ready-to-use templates and familiar Microsoft 365 apps.
- Automate key tasks with Power Automate-driven built-in workflows.
- Use Power Apps and Power BI dashboards with unique selectors to filter and analyze complex data.
- Collaborate and engage from anywhere using Microsoft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

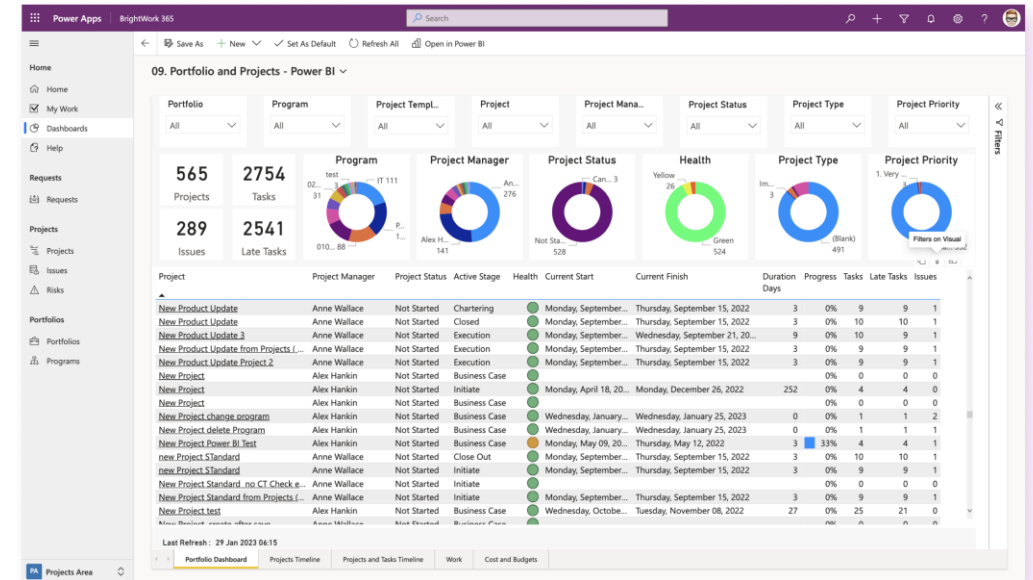
- Track the performance of your project portfolios with indicators for status, health, issues, and risks.
- Capture real-time data and customize it to create and share project performance reports in a few steps.
- Make data-backed business decisions with easy access to stats and performance.
- Create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

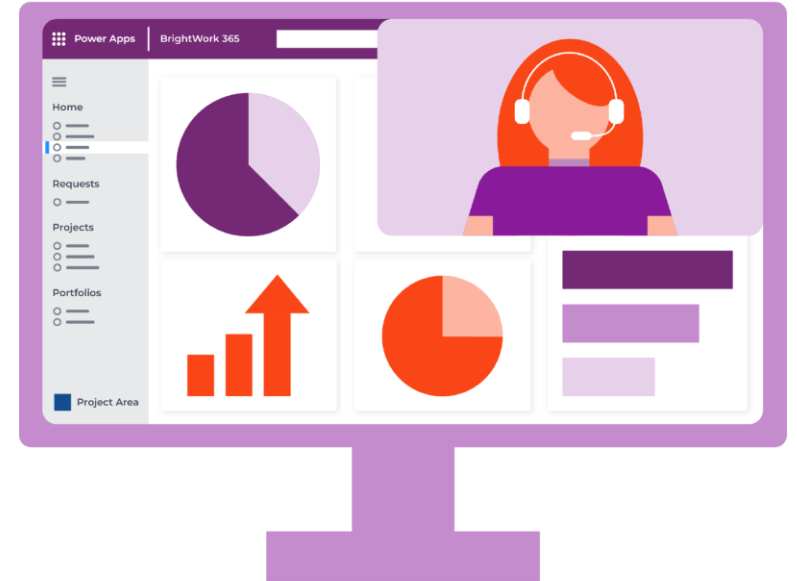
Continuous support in deployment, review, and strategy

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

