



Control Your Project Request Pipeline with Microsoft 365

Start the right projects at the right time with effective Project Request Management



Presented By

Scott Footlik

Vice President, Customer Success

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

Quick Poll

Are you using Microsoft 365 for everyday productivity?

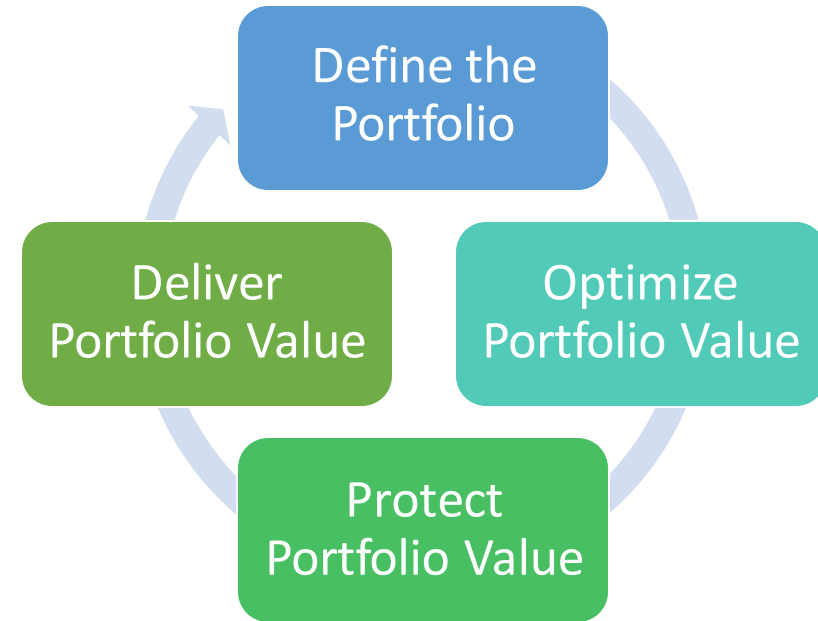
Session Overview

1. Why you need Request Management.
2. How to control project requests with templates and project governance.
3. Get visibility into the project pipeline.
4. Start the right projects at the right time with best-practice templates.
5. Q&A

Project Portfolio Governance

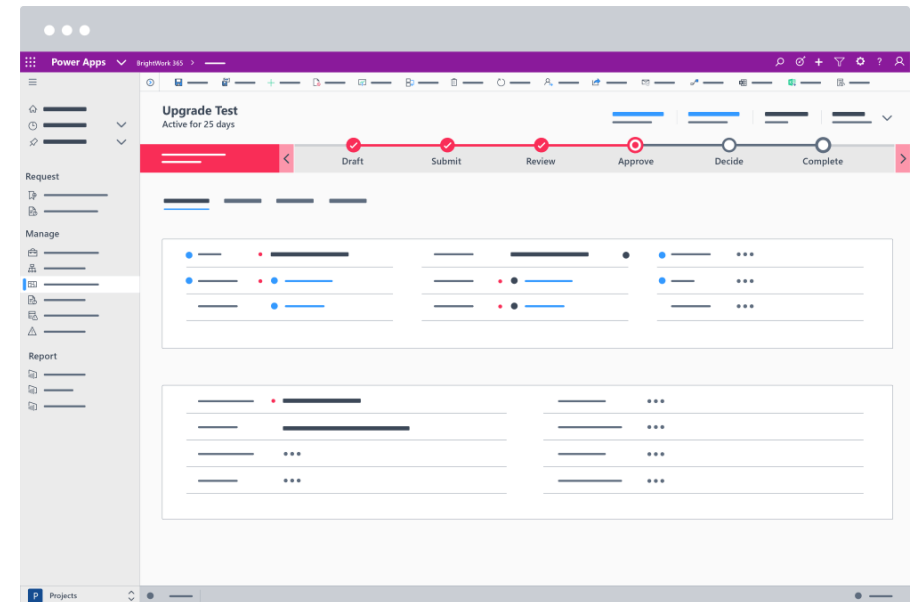
The [Association for Project Management](#) defines project portfolio governance as:

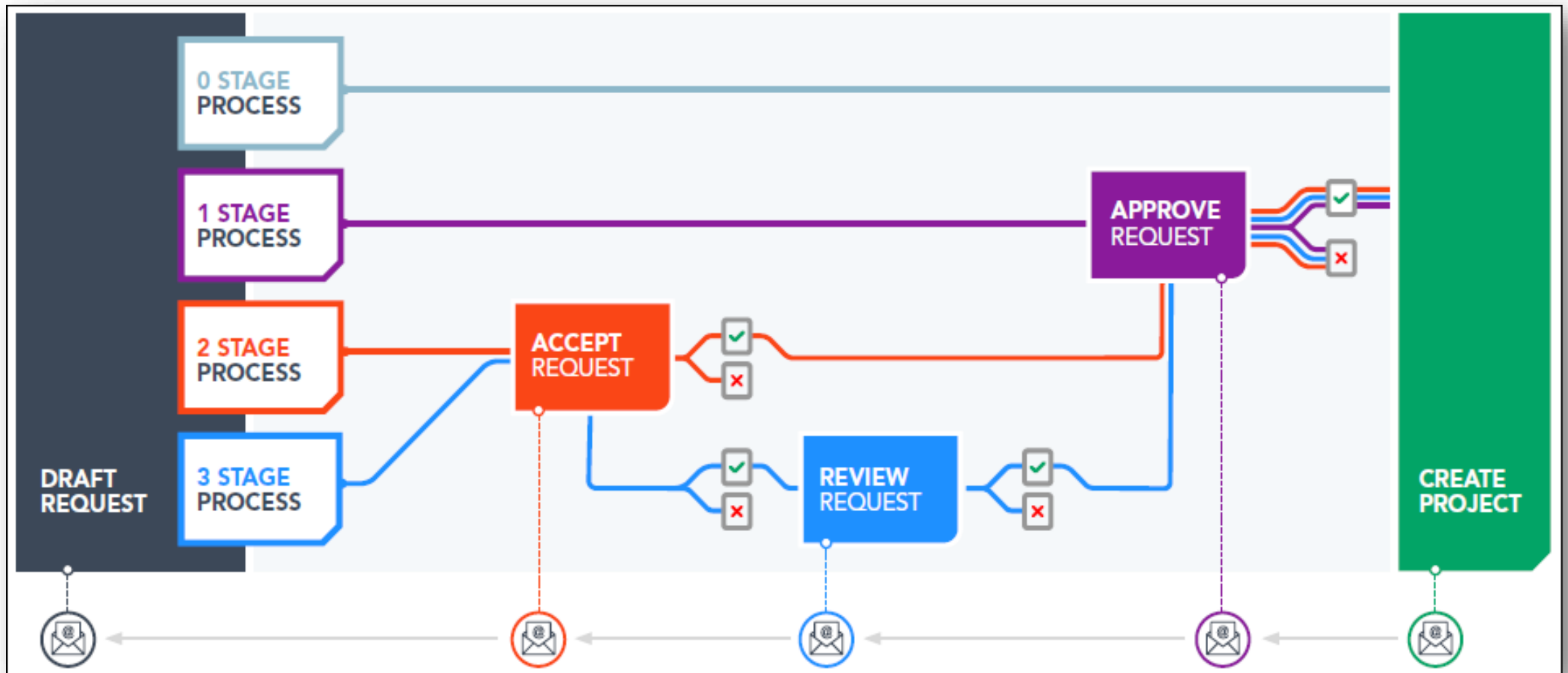
“the selection, prioritization, and control of an organization’s projects and programs in line with its strategic objectives and capacity to deliver. The goal is to balance change initiatives and business-as-usual while optimizing return on investment.”



2 Ways to Establish Project Portfolio Governance in BrightWork 365

1. Project Request Manager - One of the most important aspects of project portfolio governance is making sure projects are aligned with the strategic objectives of the organization. This is about picking the project that will deliver the most value and the highest return on investment.
2. Project Visibility and Reporting - The second aspect of project portfolio governance is having a reporting structure that provides visibility across all projects that are underway.





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Quick Poll

Does it look like BrightWork 365 might answer your Why?

Questions





THANK YOU!



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BrightWork 365 Customer Success Director

Next Steps

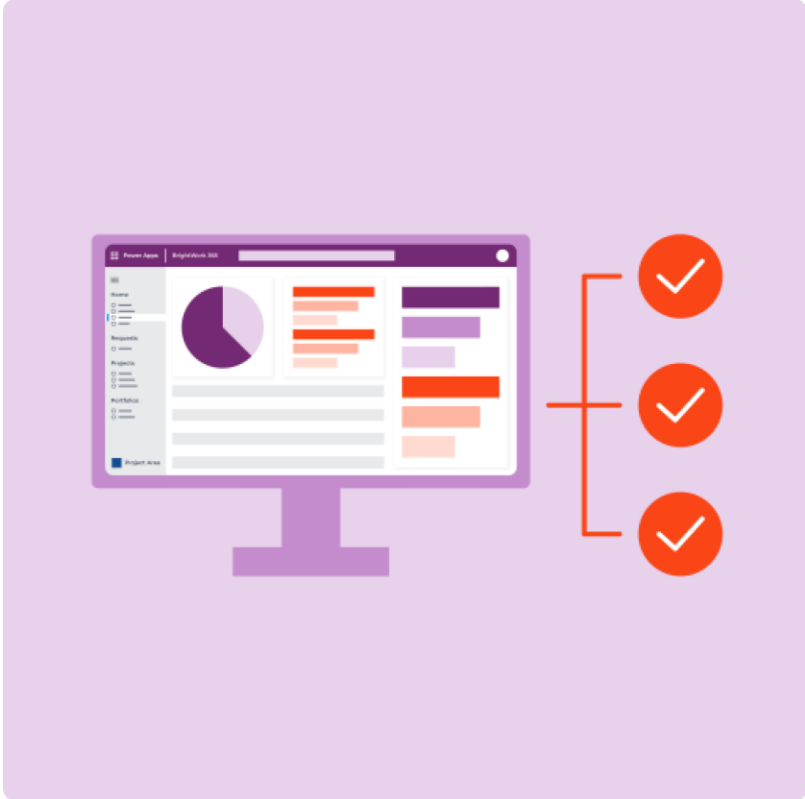
For discussion, more ideas and Q&A, contact us!



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Appendix



BrightWork Project Management Success Approach: Start-Evolve



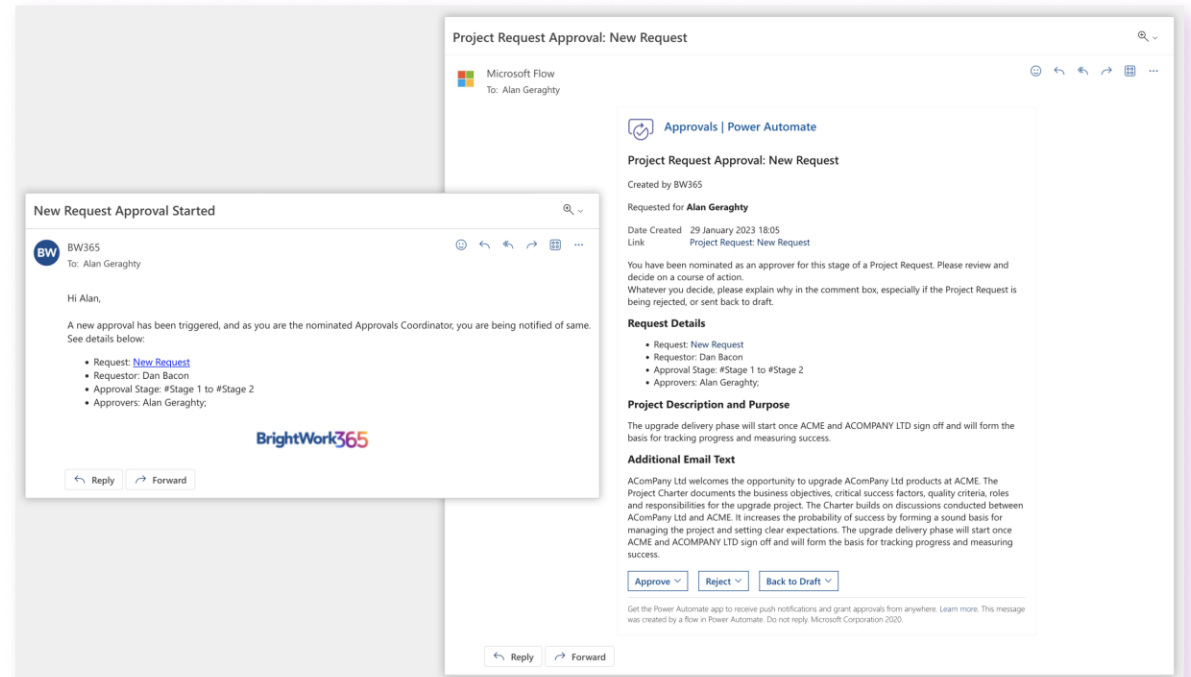
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1. Process New Project Requests

Streamline your project selection and approval process.

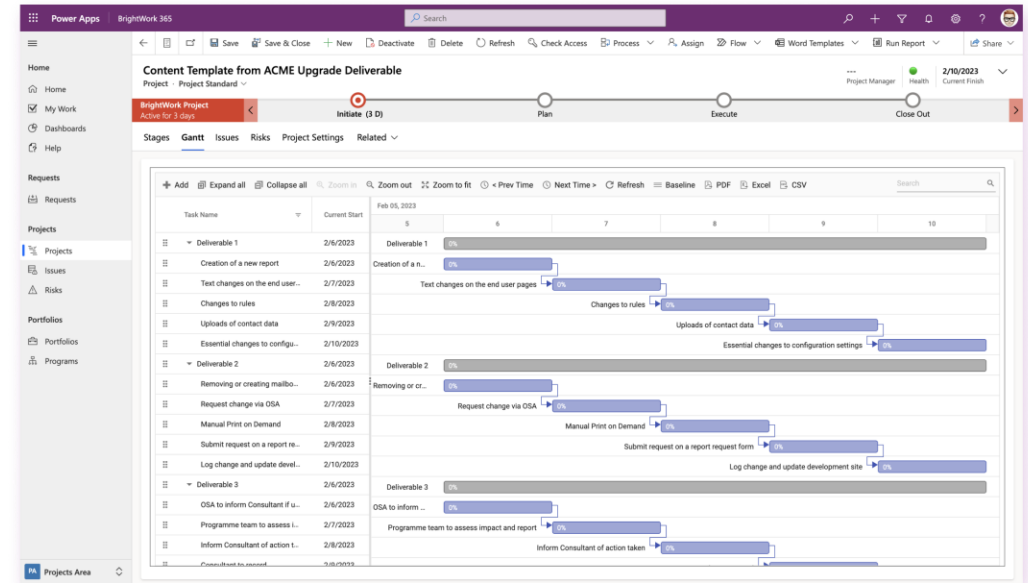
- Get ample visibility and control with BrightWork 365 Request dashboards
- Set up different stages where you can easily Draft, Accept, Approve Requests, and Create Project.
- Stay updated on actions taken on new project requests with automated notifications.
- Develop a consistent approach with configurable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



2. Manage Projects

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

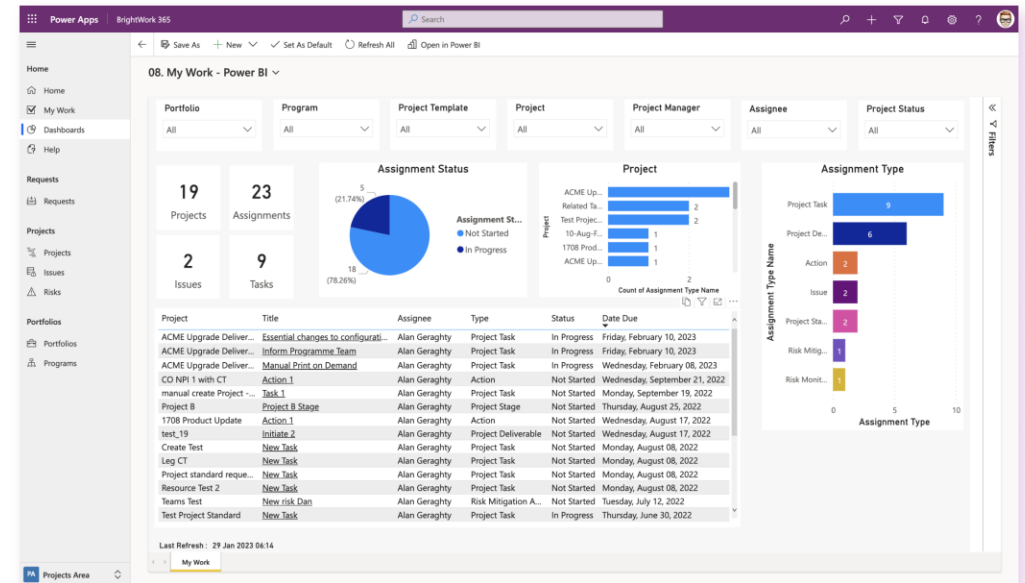
- Set up projects with ready-to-use templates and familiar Microsoft 365 apps.
- Automate key tasks with Power Automate-driven built-in workflows.
- Use Power Apps and Power BI dashboards with unique selectors to filter and analyze complex data.
- Collaborate and engage from anywhere using Microsoft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

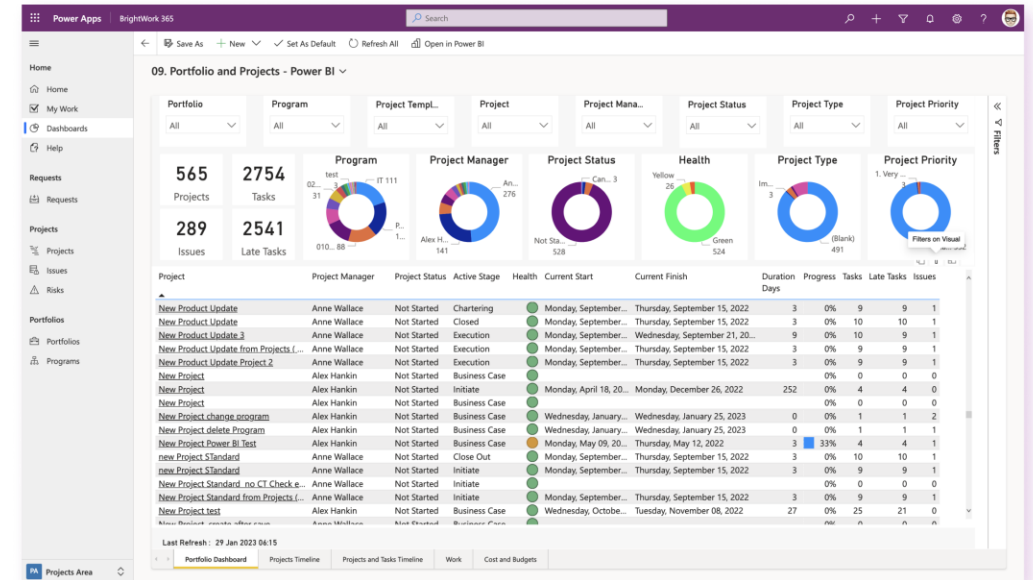
- Track the performance of your project portfolios with indicators for status, health, issues, and risks.
- Capture real-time data and customize it to create and share project performance reports in a few steps.
- Make data-backed business decisions with easy access to stats and performance.
- Create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

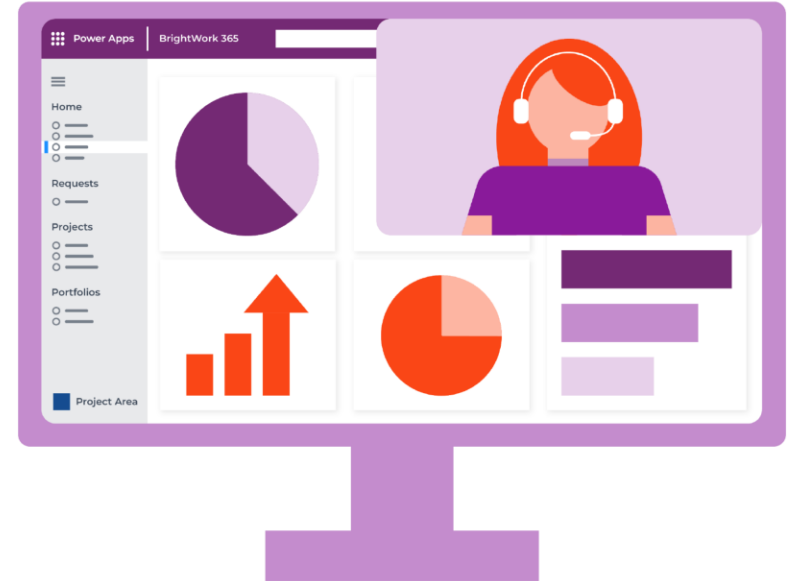
Continuous support in deployment, review, and strategy

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

