

BrightWork webinars

3 Simple Steps for Managing Project Risks in SharePoint

presented by



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QUICK POLL

**Are You Using
SharePoint for Project
Management?**



BrightWork

Projects •
Portfolios •
SharePoint •

Start managing projects with best-practice templates and dashboards.

Evolve project management with one complete SharePoint solution.



BrightWork

Some of the companies we work with and have provided Project Management Solutions

The Amazon logo, featuring the word "amazon" in a bold, black, lowercase sans-serif font with a curved orange arrow underneath it.The Dimensional logo, consisting of a red and white geometric icon resembling a play button or a stylized 'D' followed by the word "Dimensional" in a bold, black, sans-serif font.The Camden National Bank logo, featuring the word "Camden" in a blue serif font with a blue anchor icon above the 'n', and "NATIONAL BANK" in a smaller blue sans-serif font below it.The Siemens Healthineers logo, with "SIEMENS" in a teal sans-serif font and "Healthineers" in an orange sans-serif font, followed by a cluster of orange dots.The AMSURG logo, featuring the word "AMSURG" in a bold, blue, serif font.The Ascend Performance Materials logo, featuring a stylized blue and yellow 'A' icon above the word "ASCEND" in a bold, black, sans-serif font, with "PERFORMANCE MATERIALS" in a smaller black sans-serif font below it.The Schneider Electric logo, with "Schneider" in a bold, green, sans-serif font and "Electric" in a smaller green sans-serif font below it, accompanied by a green circular icon.The Army National Guard logo, featuring a black shield with "ARMY NATIONAL GUARD" in yellow and white text, and a yellow star at the bottom.

Agenda

- Roll-up site level vs. Project level to manage risks.
- Create a **risk management module in SharePoint.**
- Tracking portfolios with reporting dashboards.
- Enhanced portfolio risk management.
- Q&A

Top Rollup site and Project Level Site

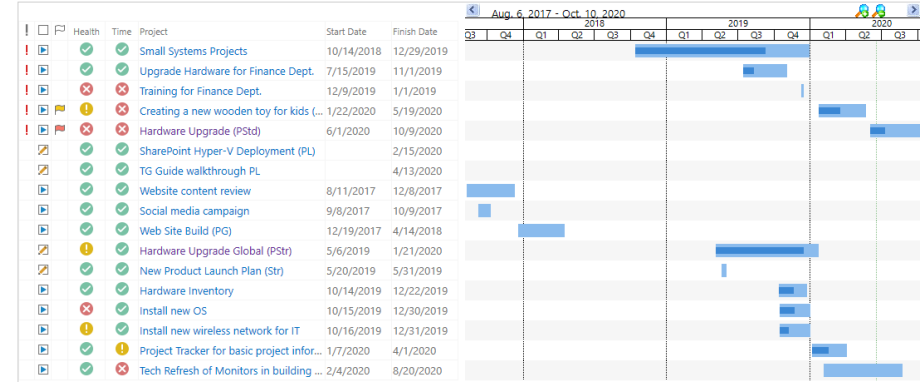
BrightWork Projects Area Portfolio Reporting Training Area **Sample Area** Templates Area Archive Area Customer Testing

Search this site

Sample Area

Sample Area All In Trouble Status Charts Gantt By Status By Manager My Projects By Exception

Project Summaries



Project Hierarchy

- Sample Area
 - Sample Project Requests (PRM)
 - Business Project Office (PO)
 - Contoso IT (PO)
 - Hardware Upgrade (PStd)
 - Hardware Upgrade Global (PStr)
 - SharePoint Hyper-V Deployment (PL)
 - Support Work Tracker (WT)
 - Tech Refresh of Monitors in building (PStd)
 - TG Guide walkthrough PL
 - Contoso Manufacturing (PO)
 - Creating a new wooden toy for kids (Std)
 - New Product Launch Plan (Str)
 - Contoso Marketing (PO)
 - Marketing Mini-Projects (PWT)
 - Web Site Build (PG)

The top-level site has Brightwork Reporter that allows you to see all Risks across the organization.

The site level is where you manage your risks.

Project Risks

+ new item or edit this list

All Items Active Items All By Assignee ... Find an item

✓	📄	📅	📄	📄	Title	Probability	Impact	Exposure	Issue Indicator
✓	📄	📅	📄	📄	(Project requirements keep on changing)	...	100 %	5	5 No
✓	📄	📅	📄	📄	(Not meeting functionality envisioned)	...	50 %	4	2 No
✓	📄	📅	📄	📄	(System is difficult to use because of inadequate usability design)	...	90 %	2	1.8 No
✓	📄	📅	📄	📄	(Disruptions due to lack of planning)	...	0 %	5	0 No
✓	📄	📅	📄	📄	(Requirements not fully captured)	...	0 %	5	0 No
✓	📄	📅	📄	📄	(Requirements possibly not technically achievable)	...	0 %	5	0 No
✓	📄	📅	📄	📄	(Software is difficult or impossible to test)	...	0 %	5	0 No
✓	📄	📅	📄	📄	(Inadequate resources for proper testing)	...	0 %	5	0 No
✓	📄	📅	📄	📄	(When deploying will the machines have sufficient processing power, memory, or storage capacity)	...	0 %	5	0 No
✓	📄	📅	📄	📄	(Has performance been considered)	...	0 %	5	0 No

Risk Management on SharePoint

The screenshot shows the BrightWork interface for managing risks. The main content area displays a table titled 'All Risks' with the following columns: Title, Owner, Assigned To, Exposure, Cost Exposure, and Rank. The risks are grouped by project site.

Title	Owner	Assigned To	Exposure	Cost Exposure	Rank
Project Site : Hardware Upgrade Global (PSM) (10)					
(Not meeting functionality envisioned)			0	\$0.00	0
(System is difficult to use because of inadequate usability design)			0	\$0.00	0
(Project requirements keep on changing)			0	\$0.00	0
(Disruptions due to lack of planning)			0	\$0.00	0
(Requirements not fully captured)			0	\$0.00	0
(Requirements possibly not technically achievable)			0	\$0.00	0
(Software is difficult or impossible to test)			0	\$0.00	0
(Inadequate resources for proper testing)			0	\$0.00	0
(When deploying will the machines have sufficient processing power, memory, or storage capacity)			0	\$0.00	0
(Has performance been considered)			0	\$0.00	0
Project Site : High Wire Press Release (PSM) (10)					
(Not meeting functionality envisioned)			0	\$0.00	0
(System is difficult to use because of inadequate usability design)			0	\$0.00	0
(Project requirements keep on changing)			0	\$0.00	0
(Disruptions due to lack of planning)			0	\$0.00	0
(Requirements not fully captured)			0	\$0.00	0
(Requirements possibly not technically achievable)			0	\$0.00	0
(Software is difficult or impossible to test)			0	\$0.00	0
(Inadequate resources for proper testing)			0	\$0.00	0
(When deploying will the machines have sufficient processing power, memory, or storage capacity)			0	\$0.00	0

Essentials elements of Risk Management

The main purpose of risk management is to decrease the probability and impact of negative events on a project.

Engage with your team for collaborative risk planning
Educate, Inquire, and plan together.

Build out your risk management module in SharePoint
Use SharePoint to create a personal management system that matches your needs.

Understand enhanced portfolio risk management
Use BrightWork to start quickly and evolve as needed.

Risk Management Process

The project risk management process would normally follow these steps:

- Plan Risk Management
- Identify Risks
- Perform Qualitative Risk Analysis
- Perform Quantitative Risk Analysis
- Plan Risk Response
- Monitor and Control Risks.

Title	Owner	Assigned To	Exposure	Cell Exposure	Rank
Project Site : Hardware Upgrade Global (P2tr) (10)					
(Not meeting functionality envisioned)			0	\$0.00	0
(System is difficult to use because of inadequate usability design)			0	\$0.00	0
(Project requirements keep on changing)			0	\$0.00	0
(Disruptions due to lack of planning)			0	\$0.00	0
(Requirements not fully captured)			0	\$0.00	0
(Requirements possibly not technically achievable)			0	\$0.00	0
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(Inadequate resources for proper testing)			0	\$0.00	0
(When deploying will the machines have sufficient processing power, memory, or storage capacity)			0	\$0.00	0
(Has performance been considered)			0	\$0.00	0
Project Site : High Wire Press Release (P5td) (10)					
(Not meeting functionality envisioned)			0	\$0.00	0
(System is difficult to use because of inadequate usability design)			0	\$0.00	0
(Project requirements keep on changing)			0	\$0.00	0
(Disruptions due to lack of planning)			0	\$0.00	0
(Requirements not fully captured)			0	\$0.00	0
(Requirements possibly not technically achievable)			0	\$0.00	0
(Software is difficult or impossible to test)			0	\$0.00	0
(Inadequate resources for proper testing)			0	\$0.00	0
(When deploying will the machines have sufficient processing power, memory, or storage capacity)			0	\$0.00	0

Risk Management SharePoint Form

The screenshot shows a SharePoint form for Risk Management. The form is displayed in a web browser window with a ribbon at the top containing 'BROWSE' and 'EDIT' tabs. Below the ribbon are icons for 'Save', 'Cancel', 'Paste', 'Copy', 'Cut', and 'Attach File'. The form fields are as follows:

- Title ***: A text input field.
- Risk Status**: A dropdown menu with '(1) Identify' selected.
- Risk Type**: A dropdown menu.
- Identification Question**: A large text area with a placeholder text: 'Question to be used to stimulate ideas that will identify the detail of this risk or other related risks.'
- Condition**: A large text area with a placeholder text: 'Describe the observable condition, event or state that may adversely affect the project.'
- Consequence**: A large text area with a placeholder text: 'Describe the ensuing loss that may be realized should the risk condition become a reality.'
- Root Cause**: A large text area with a placeholder text: 'Describe what caused the Condition to occur.'
- Owner**: A text input field with a placeholder text: 'Enter a name or email address...'

The left sidebar contains a navigation menu with the following items:

- High Wire Press Release
- Project Help
- Initiate
 - Goals
 - Contacts
- Plan
 - Tasks Update
 - Milestones
 - Task Reports
 - Documents
 - Risks
 - Resource Reports
- Execute
 - Work Boards
 - My Work Reports
 - Work Reports
 - Discussions
- Control
 - Issues Update
 - Issue Reports
 - Metrics
 - Status Reporting

The most commonly used fields to be defined in the form would include:

1. Risk Title
2. Status
3. Type
4. Probability
5. Impact
6. Exposure
7. Mitigation Plan
8. Owner
9. Due Date

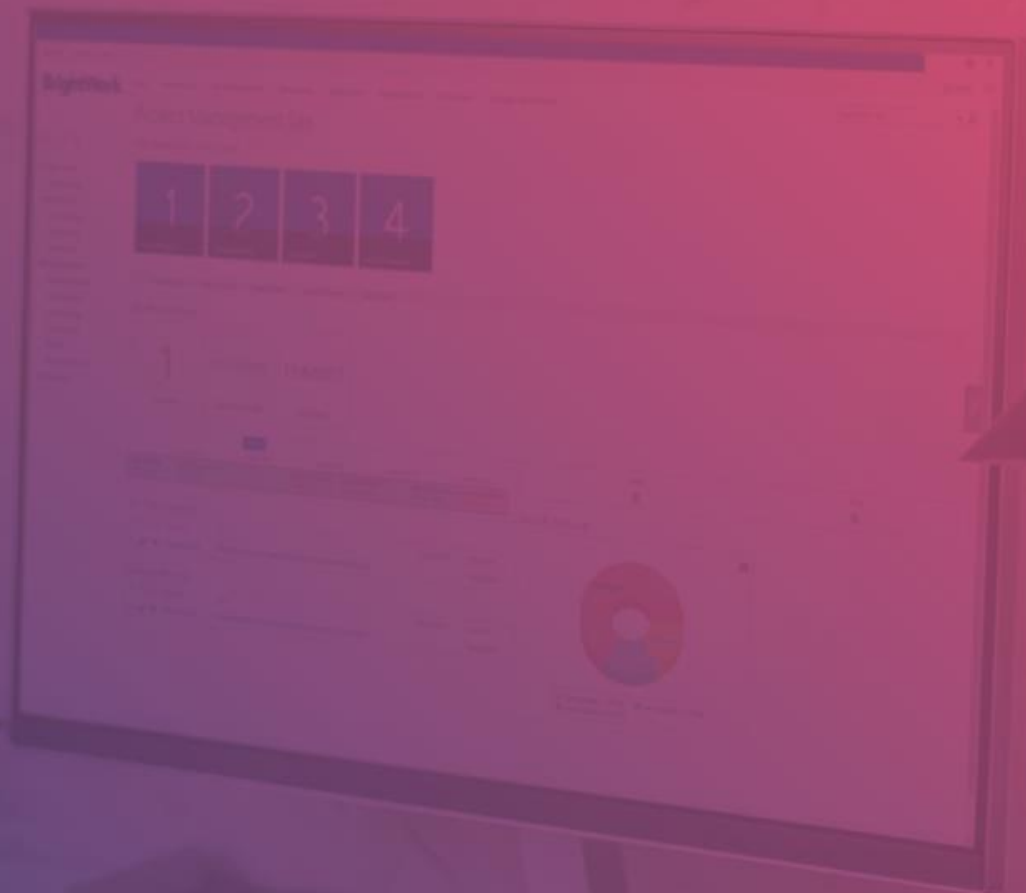
The screenshot shows a SharePoint web interface for managing project risks. At the top, there are tabs for 'BROWSE' and 'EDIT', followed by a ribbon with icons for 'Save', 'Cancel', 'Paste', 'Copy', 'Cut', and 'Attach File'. Below the ribbon is a navigation pane on the left with a tree view containing categories like 'High Wire Press Release', 'Project Help', 'Initiate', 'Plan', 'Execute', and 'Control', each with sub-items. The main content area is a form with the following fields:

- Title ***: A text input field.
- Risk Status**: A dropdown menu with '(1) Identify' selected.
- Risk Type**: A dropdown menu.
- Identification Question**: A large text area with a placeholder text: 'Question to be used to stimulate ideas that will identify the detail of this risk or other related risks.'
- Condition**: A large text area with a placeholder text: 'Describe the observable condition, event or state that may adversely affect the project.'
- Consequence**: A large text area with a placeholder text: 'Describe the ensuing loss that may be realized should the risk condition become a reality.'
- Root Cause**: A large text area with a placeholder text: 'Describe what caused the Condition to occur.'
- Owner**: A text input field with the placeholder text 'Enter a name or email address...'.

Common Risk Management Mistakes

- No risk management at all!
- Not leveraging **Exposure** fields and therefore not seeing the **Impact**.
- Not understanding how or why you should track risks.

DEMO



QUESTIONS?

➤ Use the Question pane in GoToWebinar to ask questions

THANK YOU

➤ Talk to our Solution Specialists about your project management needs



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APPENDIX

↘ BrightWork model explained

PROJECTS

Start with Standardized Project Management Templates

BrightWork includes a range project management templates that help you get projects started the right way every time, with the right amount of project management for the project and team in question.

Increase productivity by centralizing all project information into a single, cohesive tool.

The screenshot displays the BrightWork project management interface for a project titled "SharePoint Hyper-V Deployment (PL)". The interface includes a navigation menu on the left, a main content area with a "Get started with your project" section, and various project metrics and task lists.

Get started with your project

- 1 Setup Project
- 2 Set Initial Dates
- 3 Add Tasks
- 4 Add Documents

Key Project Metrics

- Late Items: 6
- Current Finish Date: 12/25/2015
- Last Change: 8/27/2018

Top Open Issues

List Name	Title	Assigned To	Due Date
Project Issues	Project time lines impacted by Resource Re-organization		12/14/2015

Overdue Items

List Name	Title	Assigned To	Due Date
Project Tasks	Install OS with Hyper-V		12/8/2015
Project Issues	Project time lines impacted by Resource Re-organization		12/14/2015
Project Tasks	Install SharePoint Server 2013 and Test		12/14/2015

Tasks By Status

A donut chart showing the distribution of tasks by status: Not Started (red), In Progress (green), and Completed (yellow).

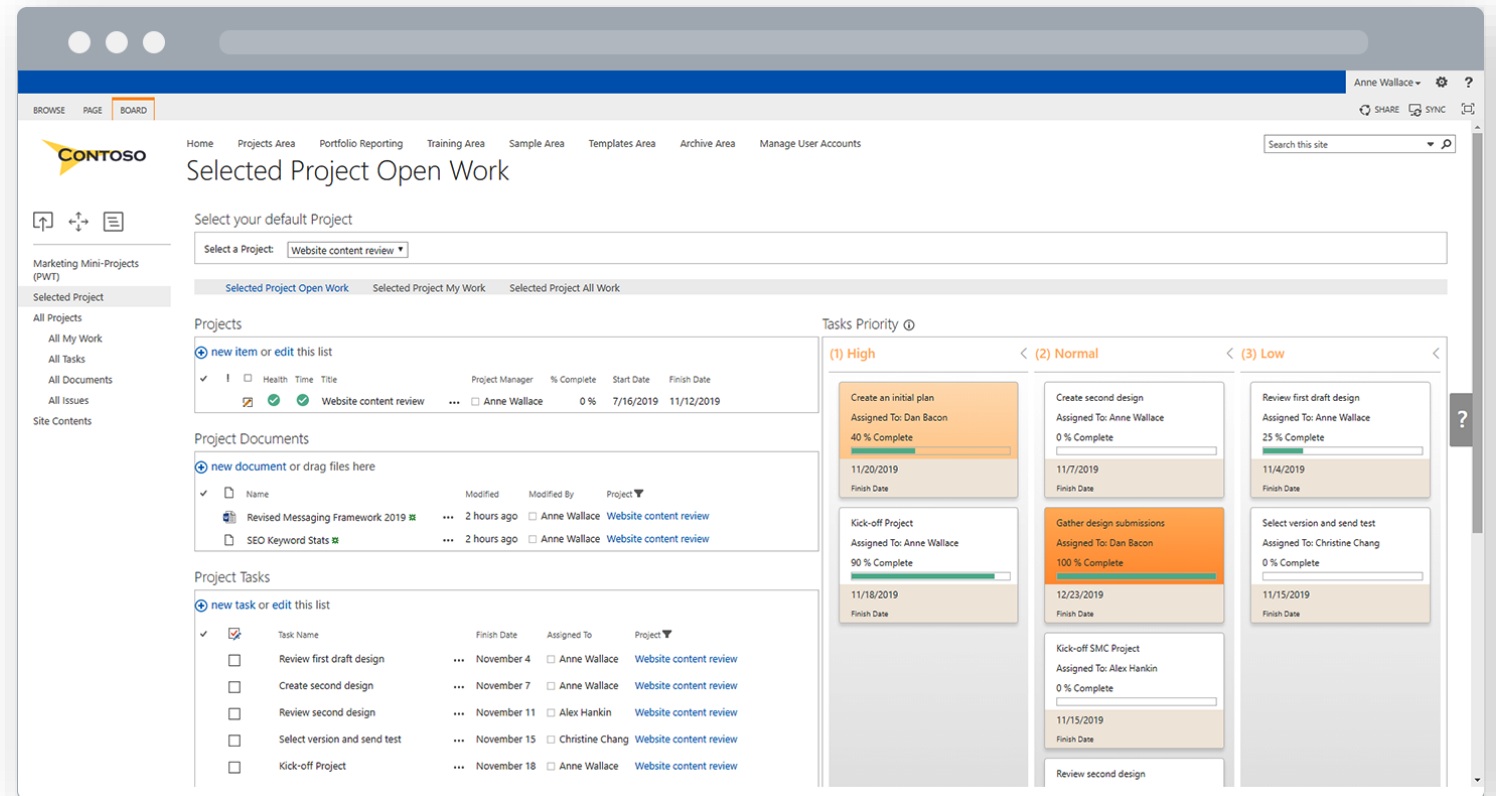
PROJECTS

Collaborate with a Team-focused Project Site

Team members can find, do and report on their work in a team-focused project site with BrightWork.

Manage your schedule with instant visibility into project and non-project tasks.

Manage your schedule with instant visibility into project and non-project task

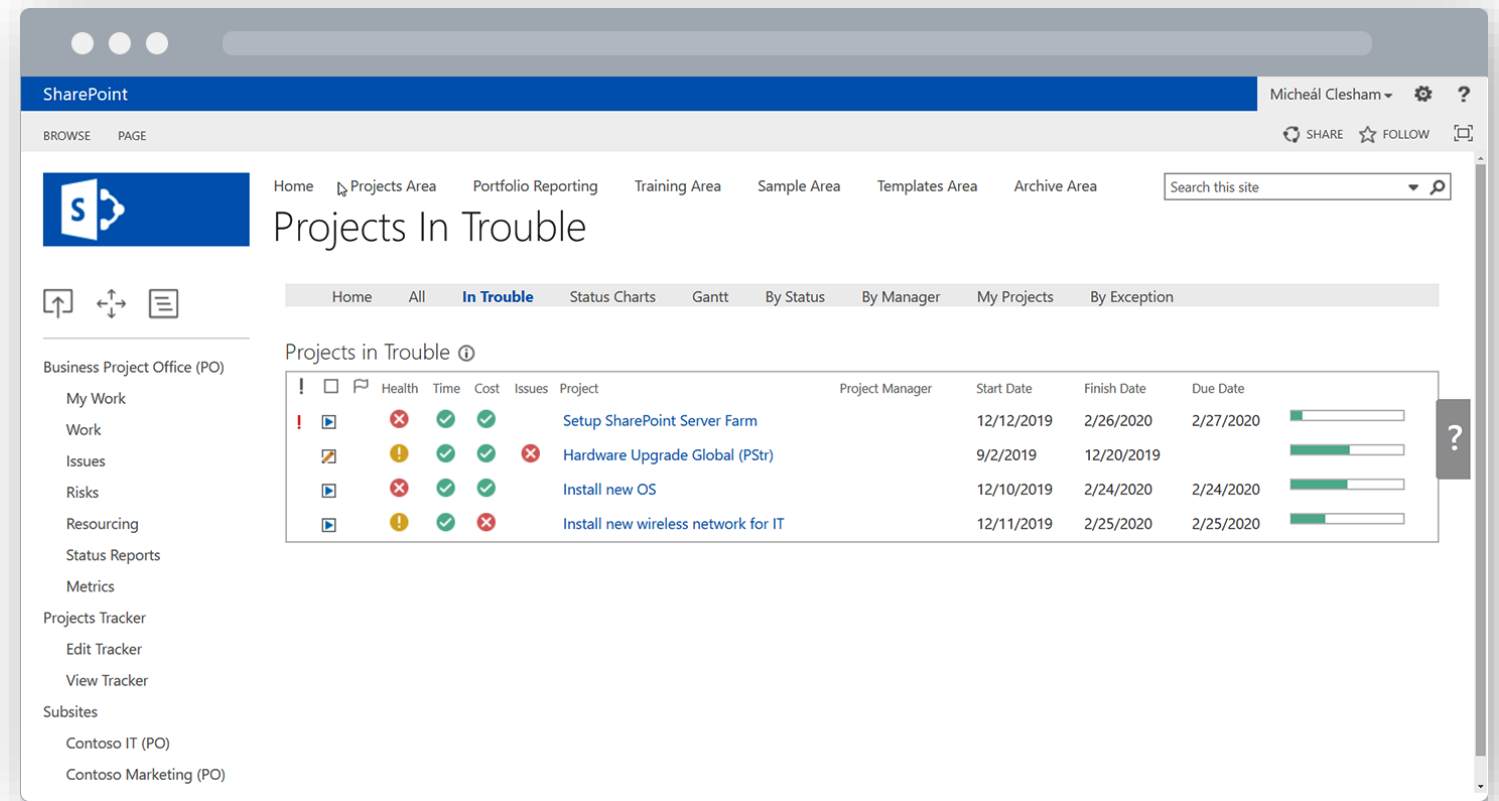


PROJECTS

Track and Share Progress with Automated Reports

Project Managers spend too much time on administration instead of the project itself!

BrightWork templates come with automated reporting and dashboards to provide project visibility to the people who need it.

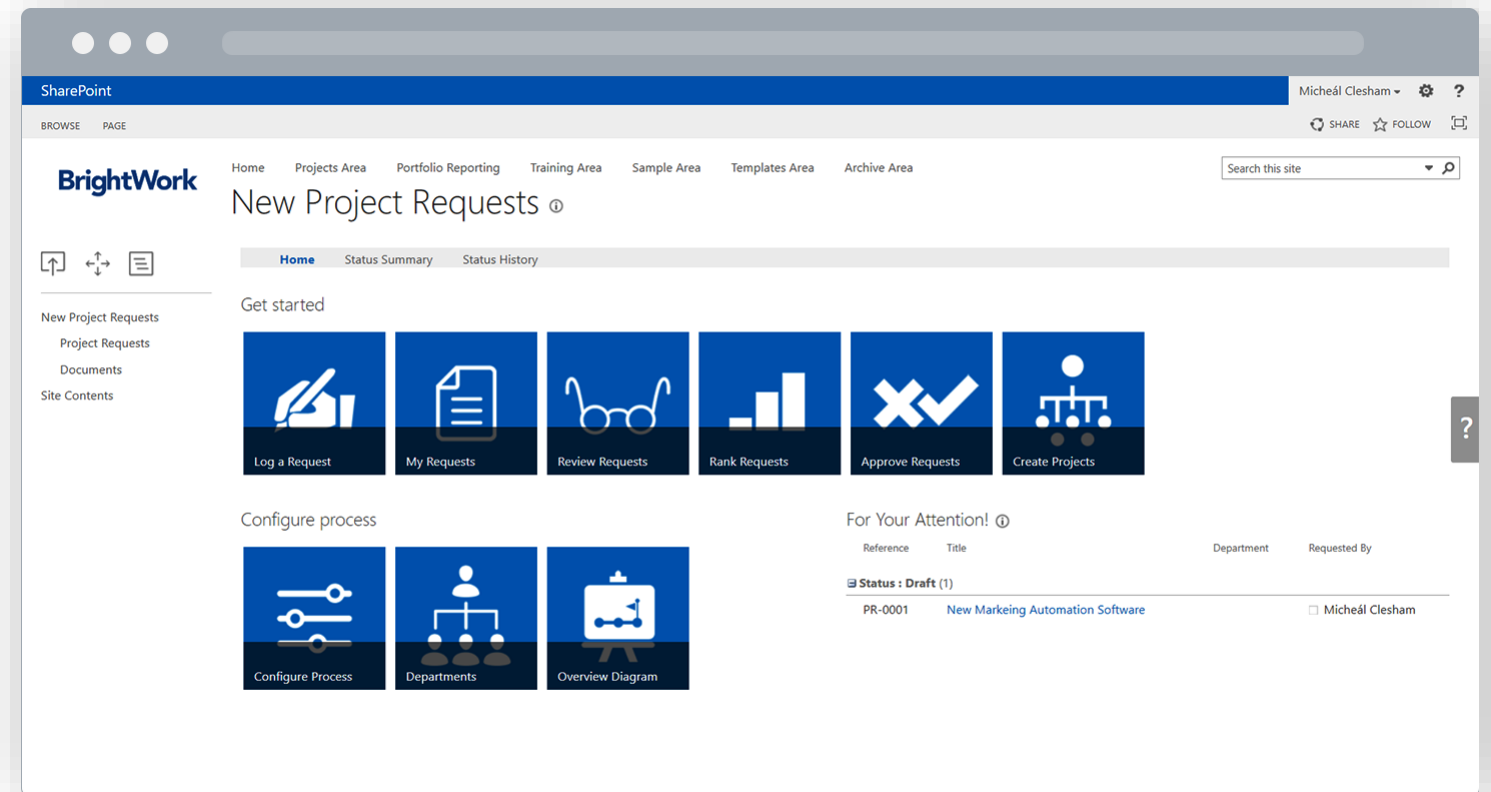


PORTFOLIOS

Approve with Scalable Project Request Management

BrightWork gives you a simple process for deciding which projects get approved and automatically creates the new project site.

Develop a transparent ranking process to ensure alignment with business objectives

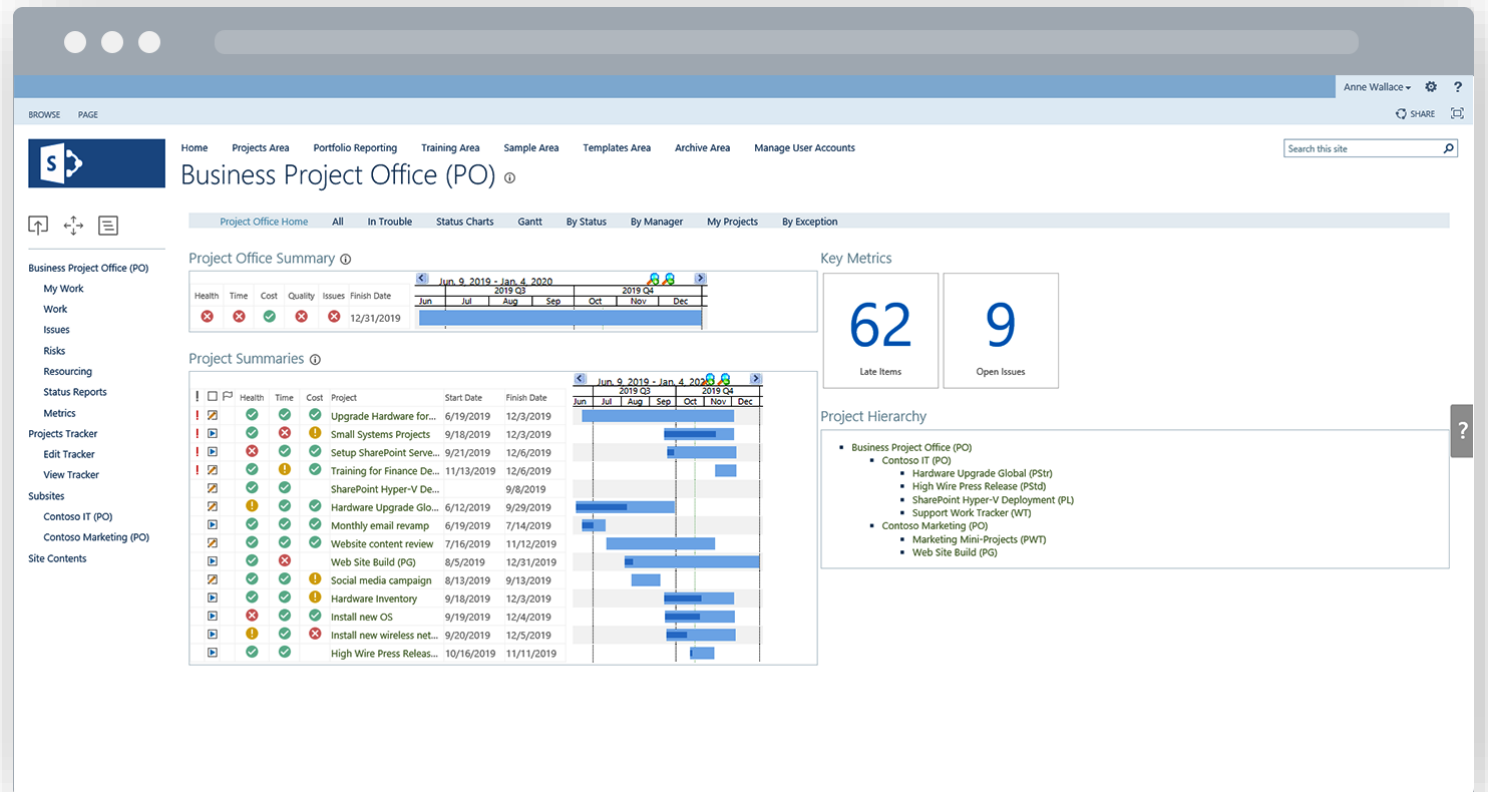


PORTFOLIOS

Track with Real-Time Portfolio Dashboards

BrightWork reporting dashboards allow you to quickly track the health and progress of all projects across the organization.

Get visibility and drill into the detail of specific projects.



PORTFOLIOS

Allocate with High-Visibility Resource Management

Simple resource reports help you track and forecast resource allocation to make sure you have optimal resource utilization across projects.

Prevent burnout and boost team morale with more transparency around workloads and commitments.

The screenshot displays the BrightWork Resource Management dashboard. The interface includes a navigation menu with options like 'Home', 'Projects Area', 'Portfolio Reporting', and 'Resource Management'. Below the navigation, there are two main tiles: 'Resource Allocation' and 'Overview Diagram'. The 'Resource Report' section is highlighted, showing a table with columns for 'Title', 'Start Date', 'Finish Date', 'Work', and quarterly data for 2019 (Q2, Q3, Q4). The table lists resources assigned to Anne Wallace, Christine Chang, and Jim Corbin.

	Title	Start Date	Finish Date	Work	Q2, 2019		Q3, 2019		Q4, 2019
					Jun/2019	Jul/2019	Aug/2019	Sep/2019	Oct/2019
<input type="checkbox"/>	Assigned To : <input type="checkbox"/> Anne Wallace (1)				80.00	184.00	176.00	168.00	40.00
<input type="checkbox"/>	Assigned To : <input type="checkbox"/> Christine Chang (1)				40.00	92.00	88.00	84.00	20.00
<input type="checkbox"/>	Assigned To : <input type="checkbox"/> Jim Corbin (1)				80.00	184.00	176.00	120.00	

SHAREPOINT

Deploy with a Low IT Burden

As BrightWork is built on the industry SharePoint platform, organizations can leverage existing and investments in infrastructure and training.

Reduce the learning curve and accelerate user adoption with a familiar environment.

Resource Management

Home Status Summary Status History Resource Management

Resource Allocation Overview Diagram

Resource Report

	Title	Start Date	Finish Date	Work	Q2, 2019		Q3, 2019		Q4, 2019
					Jun/2019	Jul/2019	Aug/2019	Sep/2019	Oct/2019
<input type="checkbox"/>	Assigned To : Anne Wallace (1)				80.00	184.00	176.00	168.00	40.00
<input type="checkbox"/>	Assigned To : Christine Chang (1)				40.00	92.00	88.00	84.00	20.00
<input type="checkbox"/>	Assigned To : Jim Corbin (1)				80.00	184.00	176.00	120.00	

SHAREPOINT

Start with local, best-practice templates and BrightWork Assistance.

Taking a template based approach to projects makes it easy to improve project standards.

Reduce resistance to change with training resources for new project managers and team members.

The screenshot displays a SharePoint project dashboard for 'High-Wire Press Release'. The interface includes a navigation menu on the left with categories like 'Initiate', 'Plan', 'Execute', and 'Control'. The main content area features a Gantt chart showing task dependencies and dates from October 20 to November 9. Below the Gantt chart are several key metrics: 6 Late Items, Current Finish Date of 11/11/2019, Last Change on 10/18/2019, 5% Complete, and a Duration of 19 days. There are also sections for 'Top Open Issues' and 'Overdue Items', both listing project issues with titles and assigned team members. A 'Tasks By Status' donut chart shows 1 task in progress (9%) and 10 tasks not started (91%).

SHAREPOINT

Evolve with Easy-To-Configure Templates

Easily create, use, reuse, and update your project management best-practices on an organizational scale.

Expand BrightWork into new teams and departments without any impact on performance or reporting.

Evolve to the desired level of organizational project management quickly and easily.

