

BrightWork365

Project & Portfolio Status Reporting on Microsoft 365

Presented by



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BrightWork

Project & Portfolio Status Reporting on Microsoft 365

AGENDA:

- **Overview of BrightWork 365 on Microsoft 365**
- **Status Reporting Best Practices**
- **Project Status Reporting**
- **Portfolio Status Reporting**

Live Questions & Answers at the end!

QUICK POLL

A photograph of a group of people sitting around a table in a meeting room. A laptop is open on the table. The image is overlaid with a semi-transparent red filter. The text 'QUICK POLL' is centered in the upper half of the image in a bold, yellow, sans-serif font.

BrightWork 365 for Microsoft 365

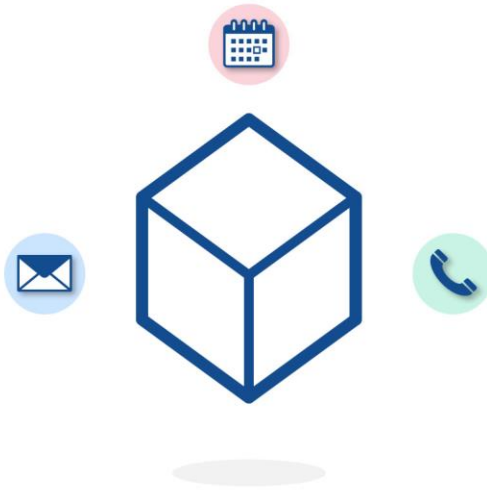
The "What"



The "How"



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

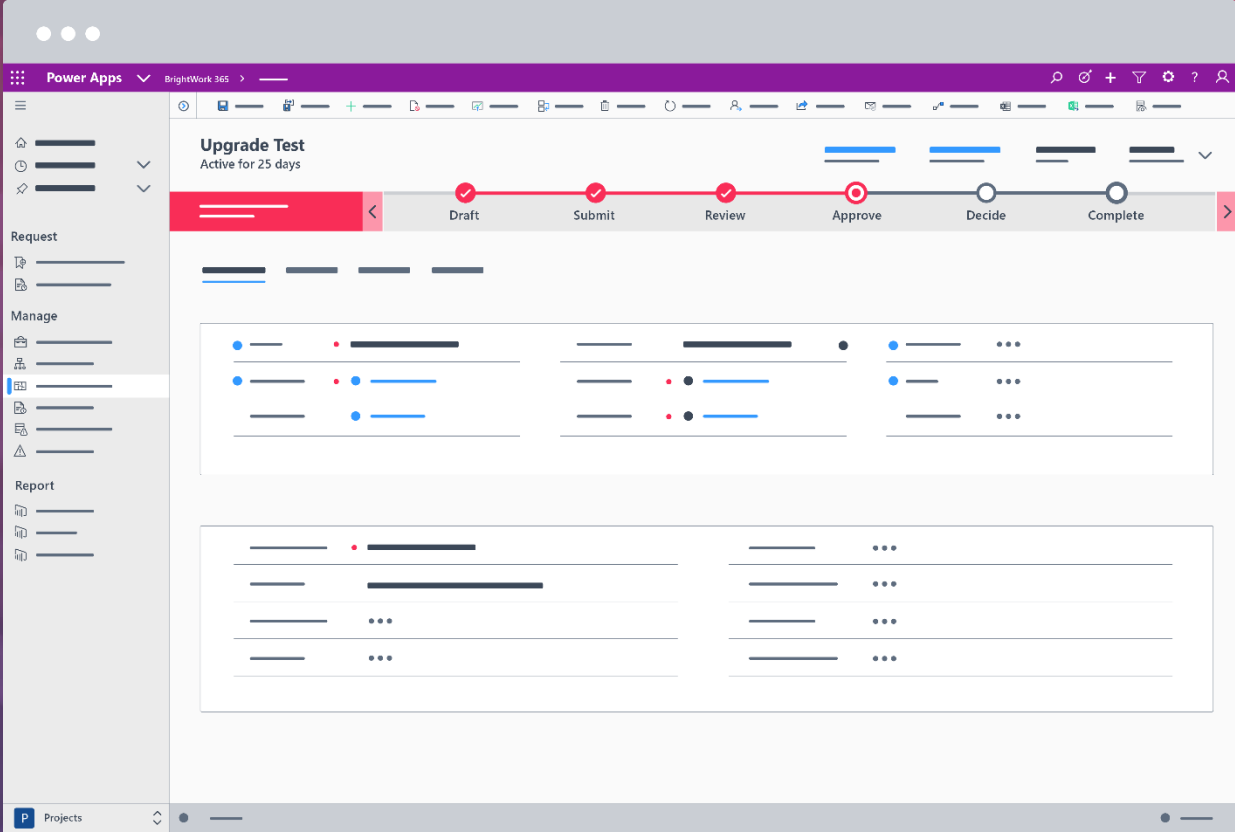
Project & Portfolio Status Reporting

Best Practices:

- Know your audience
 - Consistent and timely
 - Convenient, exposed, push and pull
 - Socialize sensitive news in advance
 - Include agreed next steps/upcoming focus
 - Draft, fresh eyes revise, publish
-

DEMO

Project and Portfolio Management



Current Status

New Product Introduction
Active for 34 days

Business Case (34 D) Development Scale-Up Launch Standard Product

Charter **Status** Status Reports Team Stages Gantt My Work Documents Actions Issues Risks Costs Communications ...

Schedule

Project Status	In Progress	
% Complete		25
% Complete Comment	---	
Current Start	8/22/2022	
Current Finish	12/2/2022	
Target Start	8/22/2022	
Target Finish	12/2/2022	

Indicators

Health	
Health Comment	---
Cost	
Cost Comment	---
Time	
Time Comment	---
Scope	
Scope Comment	---

Status Reports

New Product Introduction
Active for 34 days

Business Case (34 D) Development Scale-Up Launch Standard Product

Charter Status **Status Reports** Team Stages Gantt My Work Documents Actions Issues Risks Costs Communications ...

+ New Status Report

Name	Active Sta...	% Compl...	Health Icon	Cost Icon	Time Icon	Scope Icon	Current S...	Current I
Jonathan New Product Introduction (Demo)	Business ...	25	●	●	●	●	8/22/2022	12/2/20

Status Report

General

Log Report

Period Ending * 11/18/2022

Key Accomplishments ---

Significant Challenges ---

Upcoming Focus ---

Email Report to Sponsor No

Complete Status Report No

Created On 10/27/2022 9:32 PM

Details

Project Jonathan New Prod...

Stage Business Case

Portfolio Contoso Projects

Program Customer Success

Name * Jonathan New Produc...

Schedule

Current Start 8/22/2022

Current Finish 12/2/2022

Target Start 8/22/2022

Health

Status In Progress

% Complete 25

% Complete Comment ---

Health

Health Comment ---

Cost

Cost Comment ---

Time

Time Comment ---

Status Report Email

Project-Jonathan New Product Introduction (Demo)-Status-Report-Week-44-5744

To: Jonathan Weisglass

Cc: Jonathan Weisglass; Jonathan Weisglass

Dear Jonathan,

Please see below the latest Status Report for the Jonathan New Product Introduction (Demo) Project. This report was created by Jonathan Weisglass.

Project: Jonathan New Product Introduction (Demo)

Details	
Project	Jonathan New Product Introduction (Demo)
Stage	Development
Portfolio	Contoso Projects
Program	Customer Success
Status Report Title	Project-Jonathan New Product Introduction (Demo)-Status-Report-Week-44-5744
Period Ending	Friday, October 28, 2022
Key Accomplishments	Additional vendor contracts signed. Design document for component B has been completed.
Significant Challenges	Cost issues due to rising project related prices.
Upcoming Focus	Complete development of component A.
Project Manager	Jonathan Weisglass
Schedule	
Current Start	Monday, August 22, 2022
Current Finish	Friday, December 2, 2022

QUESTIONS?

➤ Use the Question panel to ask questions

THANK YOU



For sales info contact:

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Our mission is to:

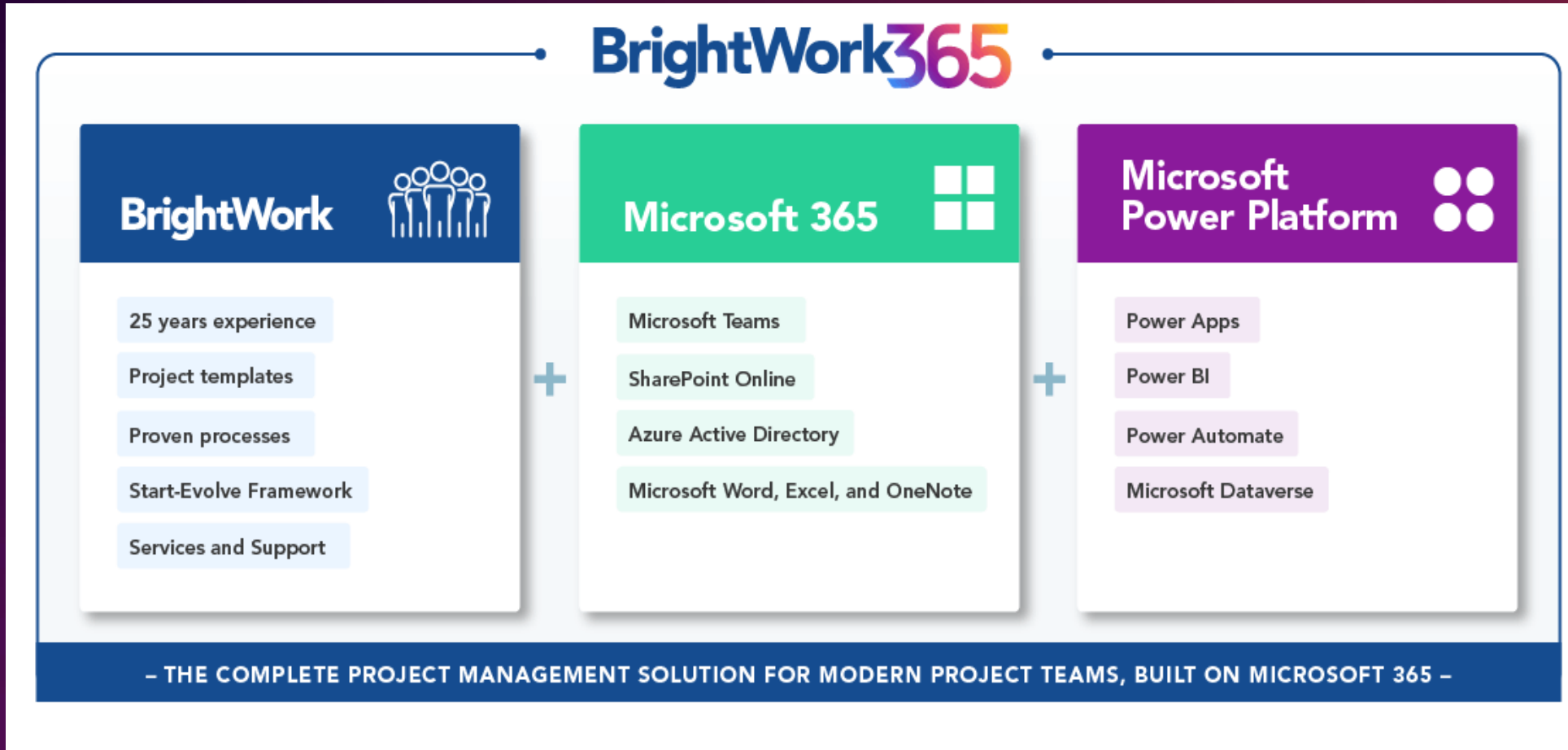
Make Project and Portfolio
Management with Microsoft
SharePoint and Microsoft 365
easier for our customers.

Project Management Success, Made Easy

BrightWork 365 allows organizations to leverage the best of the Microsoft 365 ecosystem for project work and collaboration whilst maintaining a unified view of all projects.

As BrightWork 365 is configurable, organizations can add their processes and ways of working to the Microsoft 365 apps commonly used by their teams.



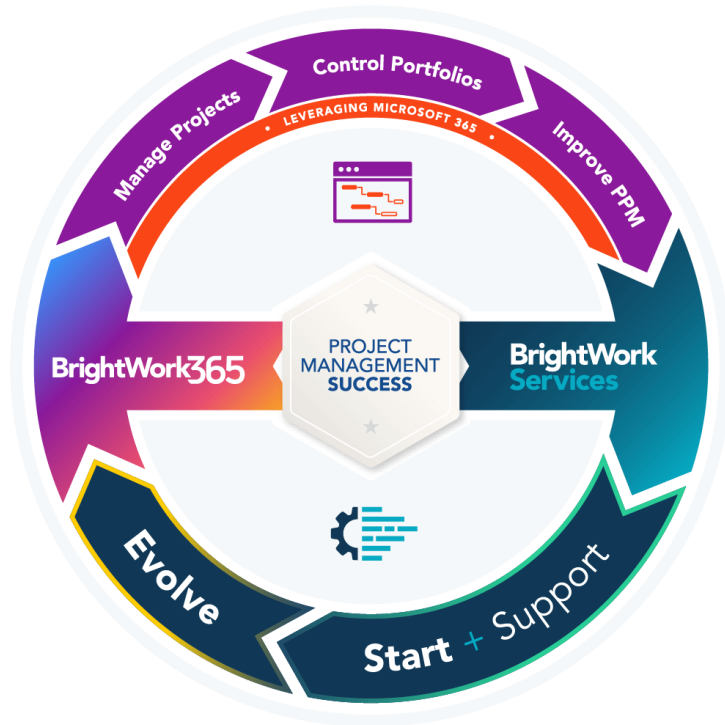


Introducing BrightWork 365 for Microsoft 365

- 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](#)



Upgrading to BrightWork 365



Contact Customer Success

Our approach to upgrading your BrightWork 365 solution includes:

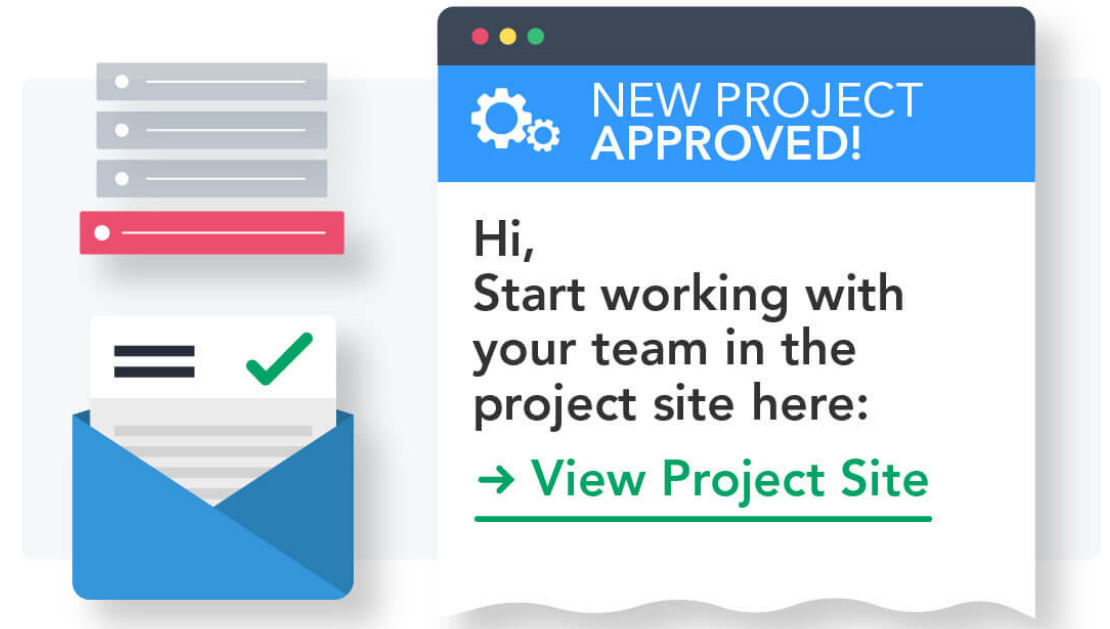
- A pre-evaluation of your Microsoft 365 solution to facilitate a smooth upgrade process.
- Providing on-hand technical assistance during the upgrade process.
- Updating any processes to leverage and new features of the latest release.

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.

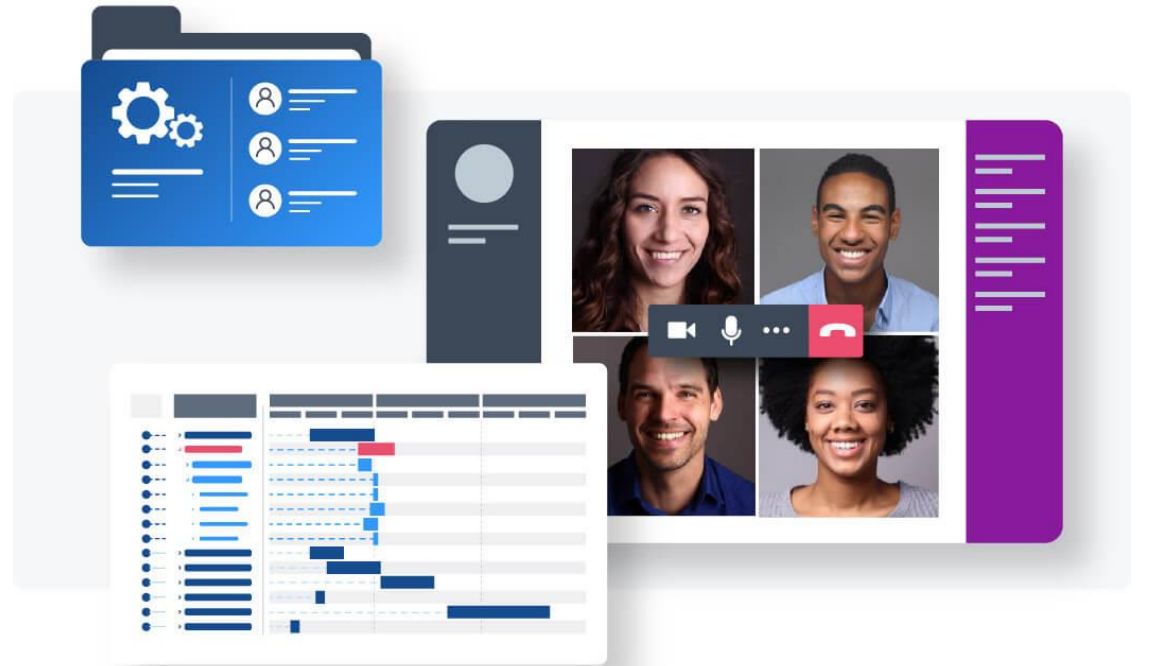
Project Requests

- 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.



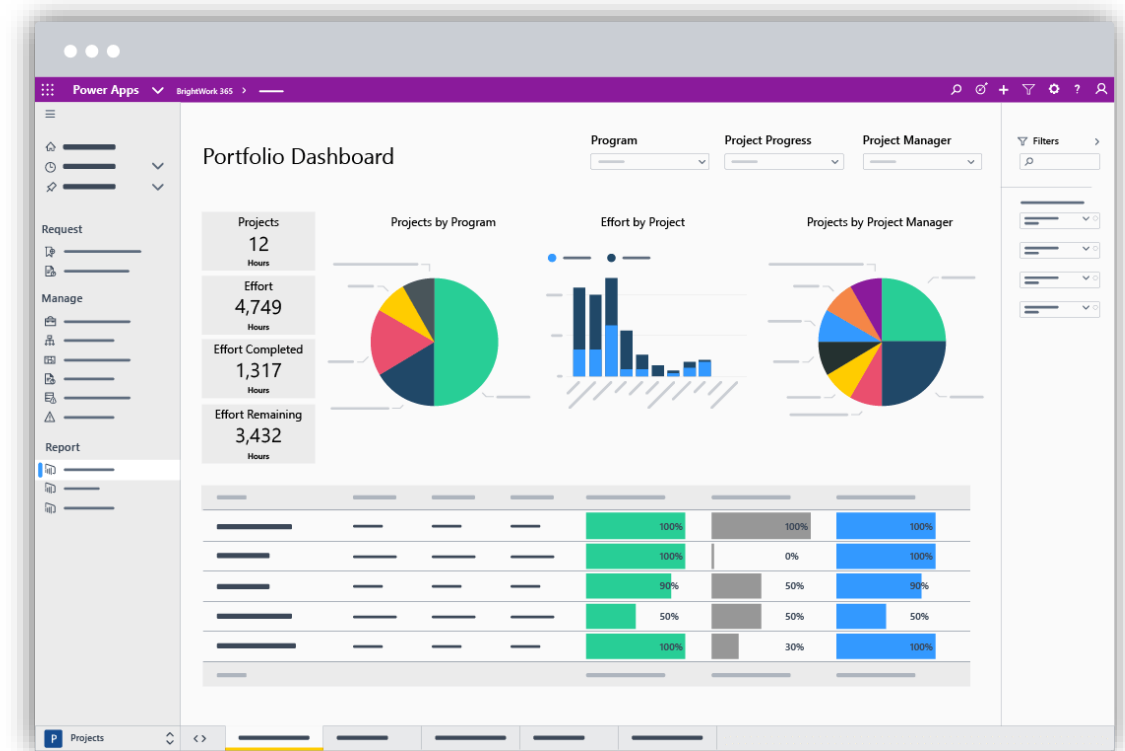
Manage Projects

- 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