

## Easy Project and Portfolio Status Reporting with Microsoft 365



#### **Presented By**

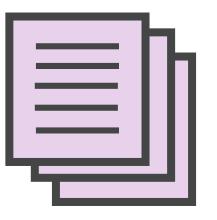
Julie Batista

BrightWork Customer Success

## **Housekeeping!**

- We are Recording! No need to take notes!
- We will send the recording along with all our slides tomorrow!
- We'll answer questions at the end of the demo!







## **Today's Agenda**

- 1. Leverage Microsoft 365 for PPM with BrightWork 365
- 2. Why is status reporting so important?
- 3. Get visibility into Project and Portfolio Health
- 4. Control resource allocation and utilization
- 5. Report on Project and Portfolio Status
- 6. Q&A.



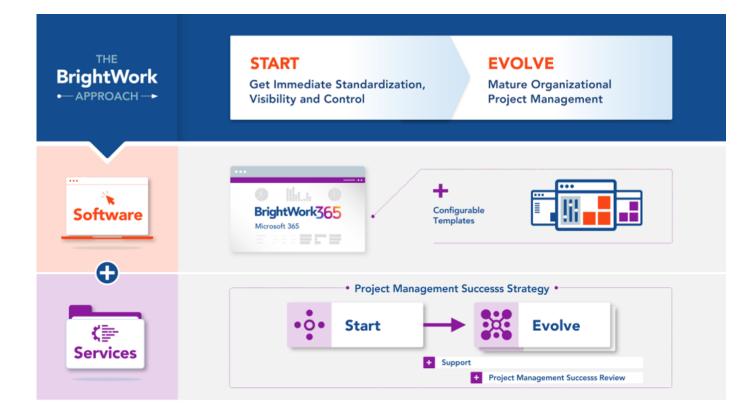
## Introducing BrightWork 365 Solution

Everything you need to Manage Requests, Projects, and Portfolios with **Microsoft 365** and the **Power Platform** 

BrightWork		Microsoft 365	U	Microsoft Power Platform
29 years experience		Microsoft Teams		Power Apps
Project templates	+	SharePoint Online	+	Power BI
Proven processes		Azure Active Directory		Power Automate
Start-Evolve Framework		Microsoft Word, Excel, and OneNote		Microsoft Dataverse
Services and Support				



## BrightWork Project Management Success Approach: Start-Evolve



#### It is a core element in our:

- Software with Configurable Templates
- Deployment Process
- Personalized Services



## Why is status reporting so important?

Ensures transparency and accountability

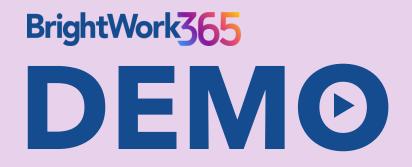
- Identifies areas needing attention
- Facilitates informed decision-making
- Prevent unpleasant surprises

Helps stakeholders understand project progress

- Keeps everyone in the loop and aligned
- Provide high-level gauge of "health"

NOTE: There are many different types of "status" that are important to report on and depend on several factors, such as

- Audience
- Reporting Level Project, Program, Portfolio





## **Get visibility into Project and Portfolio Health**

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## **Get visibility into Project and Portfolio Health - Issues and Risks**

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	Insufficient end user training	New Proj	Not Started		Regular	Project
	Insufficient end user training	Lisa Example	Not Started		Regular	Project
	Insufficient end user training	Angie Example	Not Started		Regular	Project
	Insufficient end user training	Olivia Example	Not Started		Regular	Project
	Issue Sample	JW Widget Solution	Not Started		Regular	Project
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	Consultant cost overrun	Blue Yonder Solution Deployment (Project	In Progress	Alex Hankin (Offline)	Regular	Portfolio
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0	pen Risks 🗸						😨 Edit column
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	Documentation may not be ready on time	Olivia Example	Identified	Project		2. Medium	4
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	Training not scheduled	Blue Yonder Solution Deployme	Identified	Project	Julie Batista (Offline)	3. High	6

## **Control resource allocation and utilization - Work (Assignments)**

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## **Control resource allocation and utilization - Power Bl**

#### Resource Utilization tab

11. Resource Utilization - Power BI  $\sim$ 

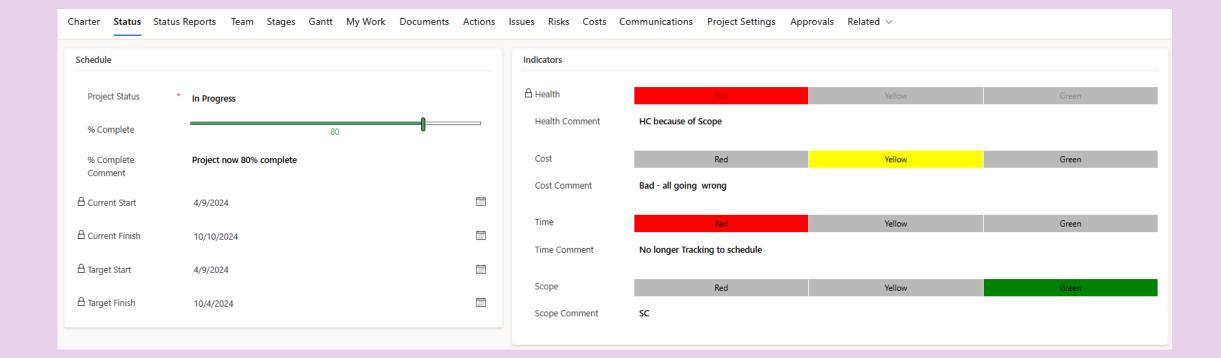
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Alan Morgan	24	48	200.0%	48	88	183.3%	48	64	133.3%	48		0.0%	48		0.0%	48		0.0%	24		0.0%	288	200	69.4%
Alex Hankin	24	24	100.0%	48	48	100.0%	48	24	50.0%	48		0.0%	48		0.0%	48	48	100.0%	24	24	100.0%	288	168	58.3%
Anne Wallace	24		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	24		0.0%	288		0.0%
Billy Guinan	32		0.0%	56		0.0%	56		0.0%	56		0.0%	56		0.0%	56		0.0%	24		0.0%	336		0.0%
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Dan Bacon	24		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	24		0.0%	288		0.0%
Éamonn McGu	24		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	24		0.0%	288		0.0%
Jim Corbin	24		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	24		0.0%	288		0.0%
John Huber	24		0.0%	48		0.0%	48	24	50.0%	48	48	100.0%	48	48	100.0%	48		0.0%	24		0.0%	288	120	41.7%
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## **Control resource allocation and utilization - Power Bl**

#### Resource Dashboard tab

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Billy Guinan				1 May 2024	10 June 2024	336		336	0.0%		Jonath	an weisg	ld	
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Dan Bacon				16 November 2023	9 May 2024	288		288	0.0%	e		Billy Gui	222	
Éamonn Mc				22 November 2023	30 May 2024	288		288	0.0%	Nan		billy Gui		
Jim Corbin				20 November 2023	17 June 2024	288		288	0.0%	Full Name	Chr	ristine Cha	ang	
John Huber				21 August 2024	6 September 2024	288	120	168	41.7%			Dan Ba		
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Total	200		288		20		l	ast Refreshed Dat	e					

### **Report on Project and Portfolio Status - Status Tab**

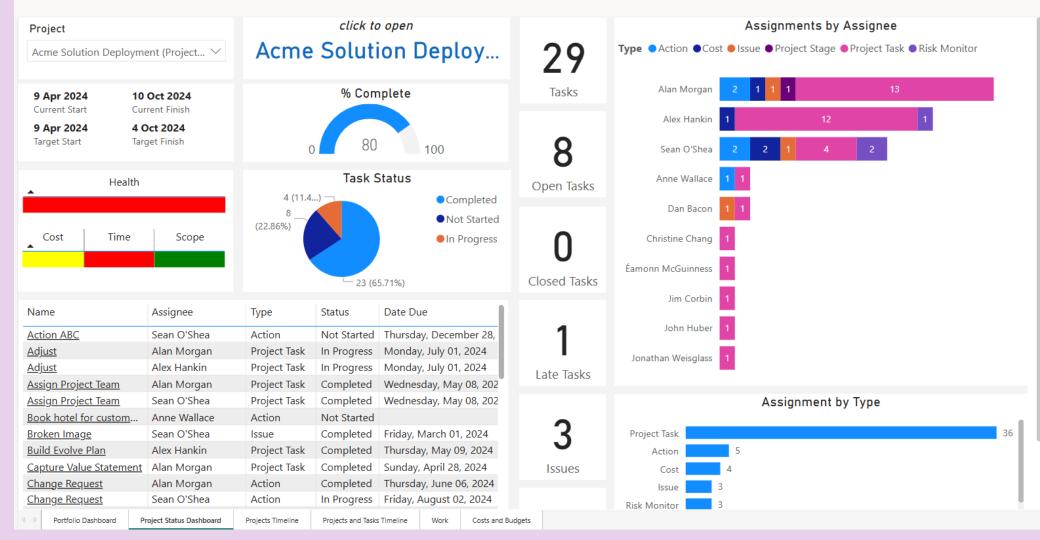


## **Report on Project and Portfolio Status - New Status Report**

New Status Report			<b>Éamonn McGuinn</b> Manager	christine Chang Sponsor	Acme Solutio Project	on Deployment (Proje	ct Structured Demo)	Contoso Portfolio	$\sim$
General									
Log Report		Details		Indicators					
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Key Accomplishments		🔒 Stage	Execute	🔒 Health Co	omment	HC because of Scope			
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Upcoming Focus		A Program	යි Customer Success	A Cost Com	iment	Bad - all going wron	g		
Email Report to		Project Schedule		A Time		Red	Yellow	Green	
Sponsor		-		A Time Con	nment	No longer Tracking to	schedule		
Email Report to Project Team		A Status	In Progress	🔒 Scope		Red	Yellow	Green	
Include Additional Recipients		A % Complete	80	🛆 Scope Co	mment	SC			
Complete Status		A % Complete Comment	Project now 80% complete						
Report	No No	A Current Start	4/9/2024	]					
A Created On		A Current Finish	10/10/2024	3					
		🔒 Target Start	4/9/2024	1					
		A Target Finish	10/4/2024	1					

## **Report on Project and Portfolio Status - Power Bl**

#### 09. Portfolio and Projects - Power BI $\sim$



## Questions





# THANK YOU!

## **Next Steps**

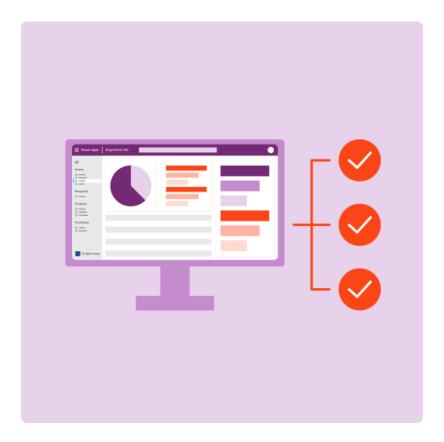
#### For discussion, more ideas and Q&A, contact us!



#### **Adam Sheehan**

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**Email:** asheehan@brightwork.com

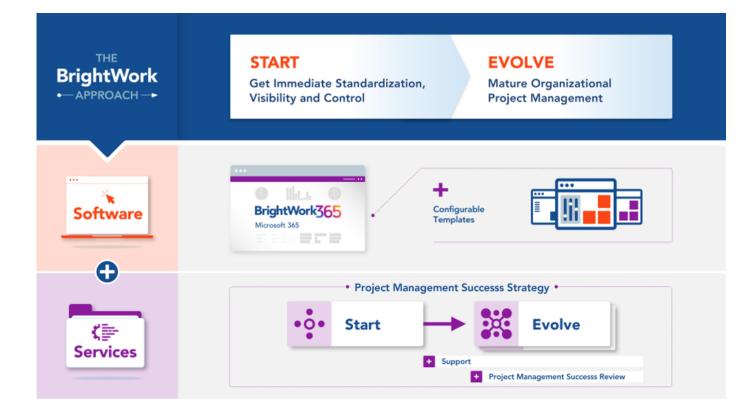




# Appendix



## **BrightWork Project Management Success Approach: Start-Evolve**



#### It is a core element in our:

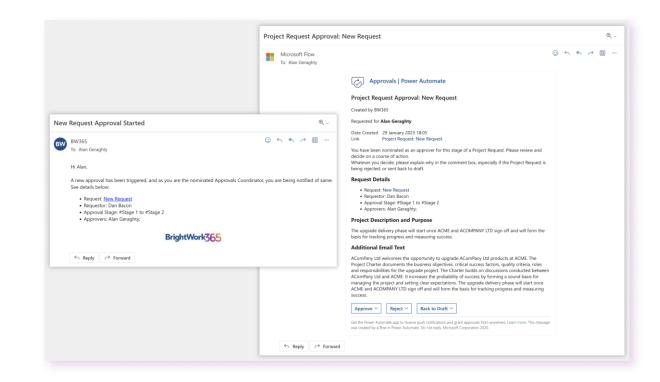
- Software with Configurable Templates
- Deployment Process
- Personalized Services



## **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.

Power Apps Brig	htWork 365		🔎 Sea	ırch									
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ome	Content Template from ACME U Project · Project Standard ~	pgrade Deliv	erable							Project	Manager Healt	2/10/202 th Current Fir	
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ortfolios	Uploads of contact data	2/9/2023					Uploads	of contact data	▶ 0%				
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Projects Area	II Consultant to moond	2/0/2022							<b>N</b> /				



## **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.

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## **4. Improve Organizational PPM**

#### Enhance your project management strategy, processes, and practices.

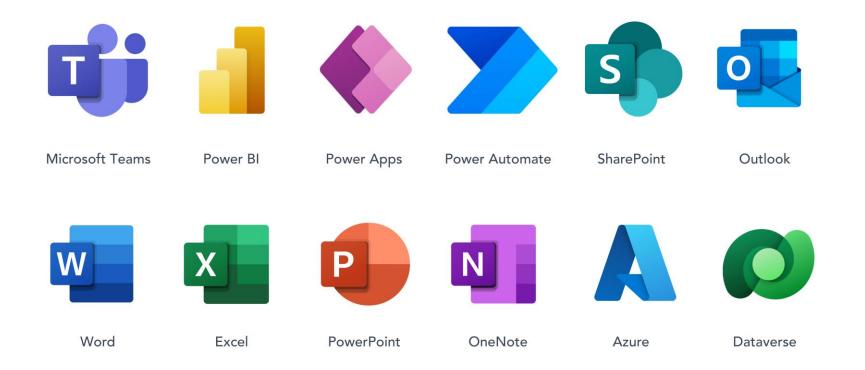
- Collaborate with your dedicated Customer Success Partner(s) to address your current PPM needs and to action towards desired goals.
- Get experts to review and evolve your PPM Success Strategy.
- Get access to new features of BrightWork 365 with every new release.
- Add new best-practice templates to support additional project types, business processes, and new business groups.
- Personal and Collaborative Leadership training material by BrightWork CEO, Éamonn McGuinness.

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## 5. Leverage Microsoft 365

Making the best of your Microsoft 365 environment with our **Microsoft Integrations** 





## **BrightWork 365 Personalized Services**

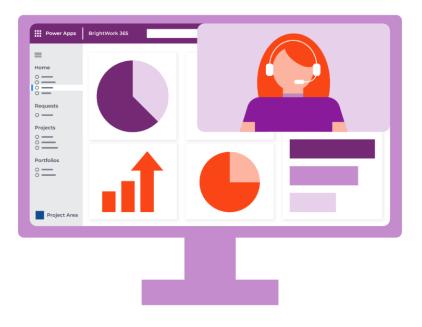
#### **Continuous support in deployment, review, and strategy**

#### **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**



















