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!

REC
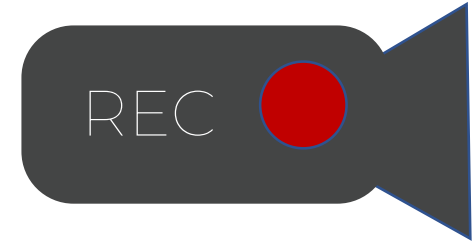
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Today's Agenda

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.

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Introducing BrightWork 365 Solution

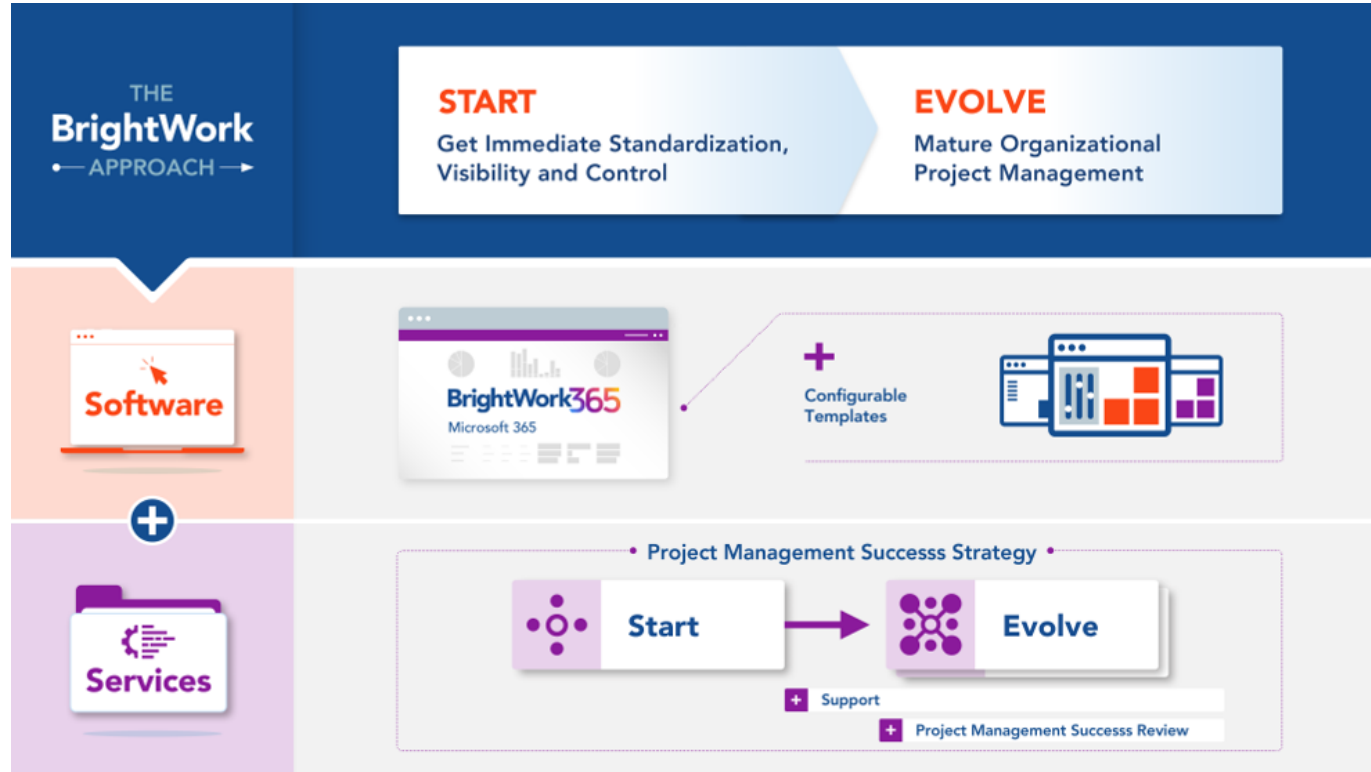Everything you need to Manage Requests, Projects, and Portfolios with **Microsoft 365** and the **Power Platform**

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

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DEMO ▶

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Get visibility into Project and Portfolio Health

Edit columns   Edit filters   Filter by keyword

Name ↑ ˅	Portfolio Status ˅	Heal... ˅	Portfolio Manager ˅	Current Start ˅	Current Finish ˅	Portfolio Type ˅	Modified On ˅
Contoso	In Progress	🟢	AW Anne Wallace (Offi...	11/13/2023	10/10/2024	Regular	8/7/2024 2:56 PM

All Projects ˅

Name ˅	Project ... ˅	Project ... ˅	% Com... ˅	Health I... ˅	Current ... ˅	Current ... ˅	Stage ˅	Project ... ˅	Project ... ˅	Program ˅	Portfolio ˅
Olivia Example	Proj-0012...	Not St...	0	🟢	2/6/2024	5/8/2024	Initiate	Strategic	AM Alan Mor...	Company...	Contoso
Lisa Example	Proj-0012...	Not St...	0	🟢	2/6/2024	5/8/2024	Initiate	Strategic	AW Anne Wa...	Company...	Contoso
New Proj	Proj-0012...	Not St...	0	🟢	2/6/2024	5/8/2024	Initiate	Strategic	AW Anne Wa...	Company...	Contoso
Angie Example	Proj-0012...	Not St...	0	🟢	2/6/2024	5/8/2024	Initiate	Operat...	AM Alan Mor...	Company...	Contoso
Acme Solution Deploymen...	Proj-0010...	In Prog...	80	🔴	4/9/2024	10/10/2024	Execute	Improv...	ÉM Éamonn ...	Customer...	Contoso
Communications & Server ...	Proj-0011...	In Prog...	26	🟡	4/10/2024	7/30/2024	Initiate	Strategic	SO Sean O'S...	Company...	Contoso
JW Widget Solution	Proj-0011...	In Prog...	50	🟢	2/7/2024	7/26/2024	Initiate	Strategic	AW Anne Wa...	Company...	Contoso
Fabrikam Solution Deploy...	Proj-0010...	In Prog...	10	🔴	11/14/2023	2/12/2024	Plan	Other	AM Alan Mor...	Customer...	Contoso
Website Redesign (Project ...	Proj-0010...	In Prog...	25	🔴	11/13/2023	6/5/2024	Execute	Improv...	CC Christine...	Marketing	Contoso
Deploy Marketing Automa...	Proj-0010...	In Prog...	34	🟡	3/31/2024	5/30/2024	Initiate	Operat...	ÉM Éamonn ...	Marketing	Contoso
Employee Onboarding (Pr...	Proj-0010...	In Prog...	25	🟡	11/13/2023	12/11/2023	Plan	Operat...	ÉM Éamonn ...	Company...	Contoso

Get visibility into Project and Portfolio Health – Issues and Risks

Open Issues ⌄

Edit columns

◯	Name ⌄	Project ⌄	Issue Status ⌄	Assigned To ⌄	Issue Type ⌄	Escalation ⌄
	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
	Issues A	Deploy Marketing Automation (Project Stan...	In Progress	SO Sean O'Shea (Offline)	Regular	Project
	Consultant cost overrun	Blue Yonder Solution Deployment (Project ...	In Progress	AH Alex Hankin (Offline)	Regular	Portfolio
	Design tools difficult to use	Website Redesign (Project Standard)	In Progress	AH Alex Hankin (Offline)	Regular	Project

Open Risks ⌄

Edit columns

◯	Name ⌄	Project ⌄	Risk Status ⌄	Escalation ⌄	Risk Monitor ⌄	Impact ⌄	Exposure ⌄
	Documentation may not be ready on time	New Proj	Identified	Project		2. Medium	4
	Documentation may not be ready on time	Lisa Example	Identified	Project		2. Medium	4
	Documentation may not be ready on time	Angie Example	Identified	Project		2. Medium	4
	Documentation may not be ready on time	Olivia Example	Identified	Project		2. Medium	4
	JTB Risk 17 July	Blue Yonder Solution Deployme...	Identified	Portfolio	JB Julie Batista (Offline)	3. High	9
	Training not scheduled	Blue Yonder Solution Deployme...	Identified	Project	JB Julie Batista (Offline)	3. High	6

Control resource allocation and utilization – Work (Assignments)

1. All Work ∨

Edit c

| ◯ Complete ∨	Name ∨	Assignee ∨	Assignment Type ∨	Assignment Status ∨	Due Date ∨	Project ∨	Program ∨	Portfolio ∨
🕐	Server	SO Sean O'Shea (Offli...	Cost	In Progress	8/30/2024	Angie Example	Company Operatio...	Contoso
🕐	Change Request	SO Sean O'Shea (Offli...	Action	In Progress	8/2/2024	Acme Solution Dep...	Customer Success	Contoso
✓	new task	AH Alex Hankin (Offline)	Project Task	Completed	10/10/2024	Acme Solution Dep...	Customer Success	Contoso
✓	new task	AM Alan Morgan (Offli...	Project Task	Completed	10/10/2024	Acme Solution Dep...	Customer Success	Contoso
✓	Design Project Tem...	AH Alex Hankin (Offline)	Project Task	Completed	6/2/2024	Acme Solution Dep...	Customer Success	Contoso
🕐	Erics Demo	AW Anne Wallace (Offl...	Cost	In Progress	8/2/2024	Communications &...	Company Operatio...	Contoso
✓	Issue ABCDE	SO Sean O'Shea (Offli...	Issue	Completed	8/2/2024	Communications &...	Company Operatio...	Contoso
✓	API Integration Issu...	AM Alan Morgan (Offli...	Issue	Completed		Blue Yonder Soluti...	Customer Success	Contoso

Control resource allocation and utilization – Power BI

Resource Utilization tab

11. Resource Utilization - Power BI ⌄

Week	Aug-04-24 to Aug-10-24			Aug-11-24 to Aug-17-24			Aug-18-24 to Aug-24-24			Aug-25-24 to Aug-31-24			Sep-01-24 to Sep-07-24			Sep-08-24 to Sep-14-24			Sep-15-24 to Sep-21-24			Total		
Full Name	Avail	Assign	Alloc	Avail	Assign	Alloc	Avail	Assign	Alloc	Avail	Assign	Alloc	Avail	Assign	Alloc	Avail	Assign	Alloc	Avail	Assign	Alloc	Avail	Assign	Alloc
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%
Christine Chang	24		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	24		0.0%	288		0.0%
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%
Jonathan Weis...	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%
Julie Batista	32		0.0%	56		0.0%	56		0.0%	56		0.0%	56		0.0%	56		0.0%	24		0.0%	336		0.0%
Niall Lenihan	24		0.0%	40		0.0%	40		0.0%	40		0.0%	40		0.0%	40		0.0%	16		0.0%	240		0.0%
Scott Footlik	24		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	24		0.0%	288		0.0%
Sean O'Shea	24		0.0%	48		0.0%	48	24	50.0%	48	48	100.0%	48	48	100.0%	48	48	100.0%	24	24	100.0%	288	192	66.7%
Total	**352**	**72**	**20.5%**	**680**	**136**	**20.0%**	**680**	**160**	**23.5%**	**680**	**144**	**21.2%**	**680**	**144**	**21.2%**	**680**	**96**	**14.1%**	**328**	**48**	**14.6%**	**4080**	**800**	**19.6%**

Control resource allocation and utilization – Power BI

Resource Dashboard tab
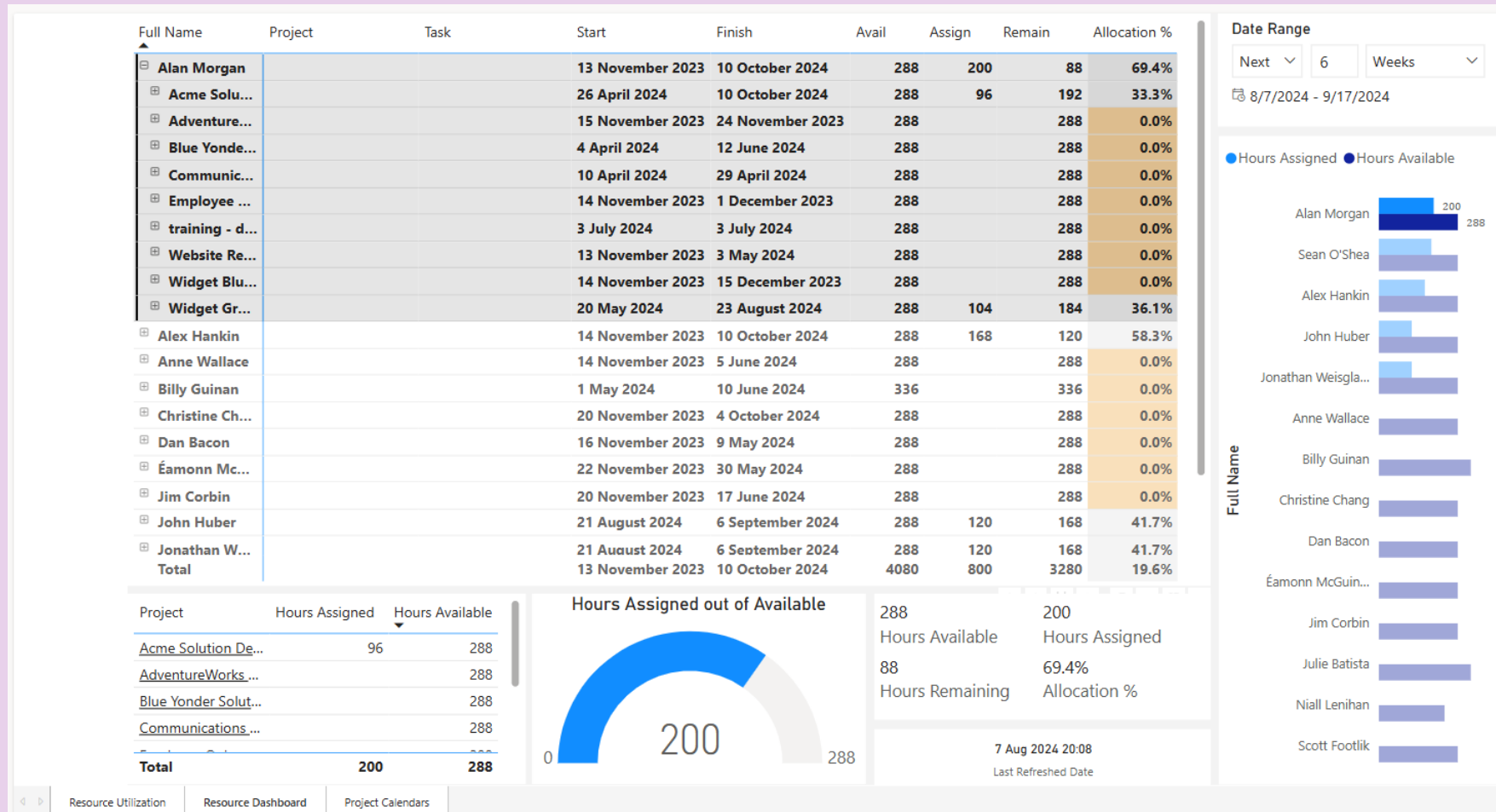
Report on Project and Portfolio Status – Status Tab

Charter **Status** Status Reports Team Stages Gantt My Work Documents Actions Issues Risks Costs Communications Project Settings Approvals Related ⌄

Schedule

Project Status	*	**In Progress**
% Complete		80
% Complete Comment		**Project now 80% complete**
🔒 Current Start		4/9/2024
🔒 Current Finish		10/10/2024
🔒 Target Start		4/9/2024
🔒 Target Finish		10/4/2024

Indicators

	Red	Yellow	Green
🔒 Health	**Red**	Yellow	Green
Health Comment	**HC because of Scope**		
Cost	Red	**Yellow**	Green
Cost Comment	**Bad - all going wrong**		
Time	**Red**	Yellow	Green
Time Comment	**No longer Tracking to schedule**		
Scope	Red	Yellow	**Green**
Scope Comment	**SC**		

Report on Project and Portfolio Status – New Status Report

New Status Report

| Éamonn McGuinness | Christine Chang | Acme Solution Deployment (Project Structured Demo) | Contoso |
| Manager | Sponsor | Project | Portfolio |

General

Log Report

Period Ending	*	--- 📅
Key Accomplishments		---
Significant Challenges		---
Upcoming Focus		---
Email Report to Sponsor		☐
Email Report to Project Team		☐
Include Additional Recipients		☐
Complete Status Report		⬤ No
🔒 Created On		--- 📅

Details

🔒 Project	📑 Acme Solution Deployment (Project Structured Demo)
🔒 Stage	**Execute**
🔒 Portfolio	💼 Contoso
🔒 Program	🔗 Customer Success

Project Schedule

🔒 Status	**In Progress**
🔒 % Complete	**80**
🔒 % Complete Comment	**Project now 80% complete**
🔒 Current Start	4/9/2024 📅
🔒 Current Finish	10/10/2024 📅
🔒 Target Start	4/9/2024 📅
🔒 Target Finish	10/4/2024 📅

Indicators

🔒 Health	Red	Yellow	Green
🔒 Health Comment	HC because of Scope		
🔒 Cost	Red	Yellow	Green
🔒 Cost Comment	Bad - all going wrong		
🔒 Time	Red	Yellow	Green
🔒 Time Comment	No longer Tracking to schedule		
🔒 Scope	Red	Yellow	Green
🔒 Scope Comment	SC		

Report on Project and Portfolio Status – Power BI
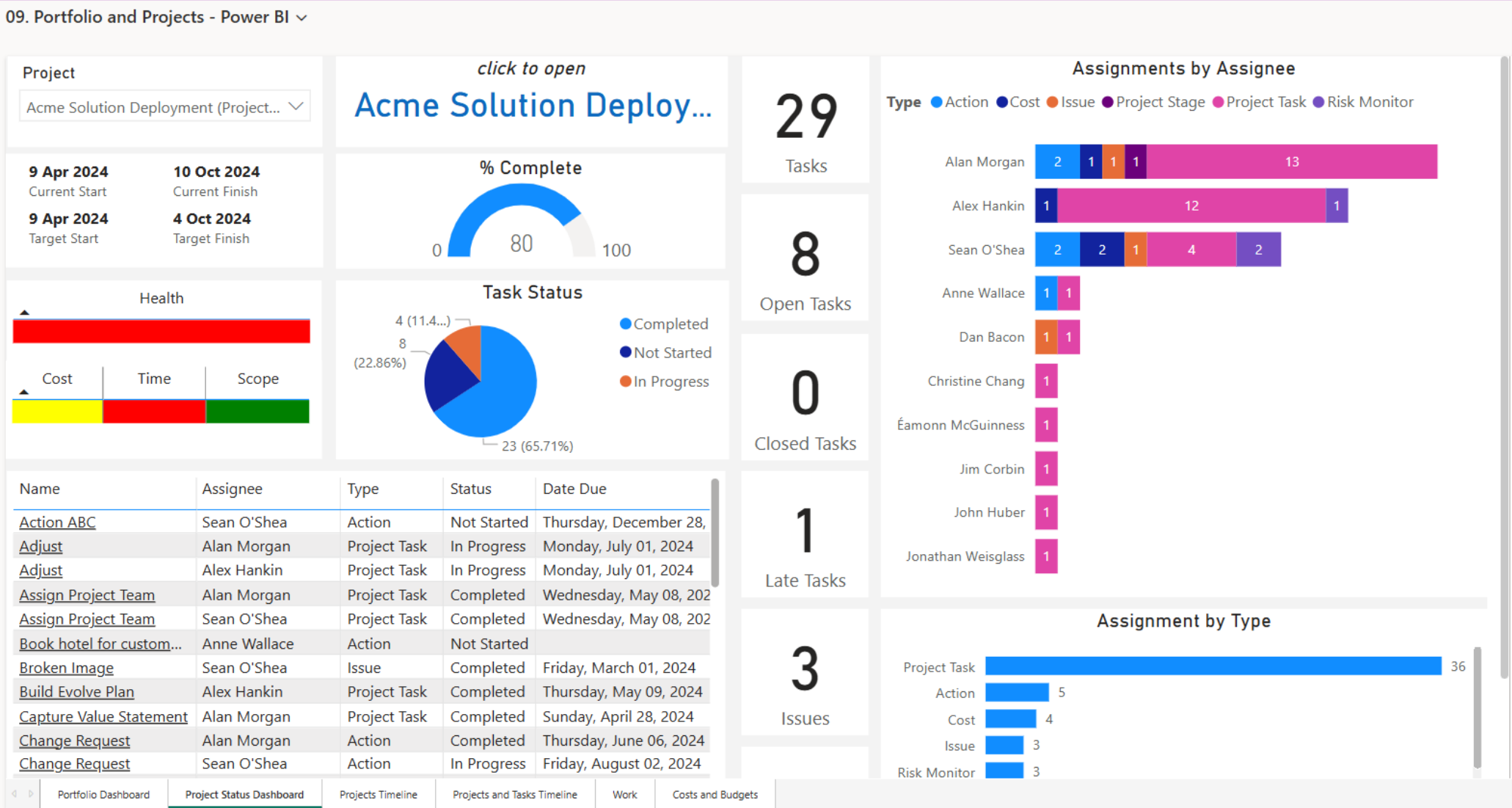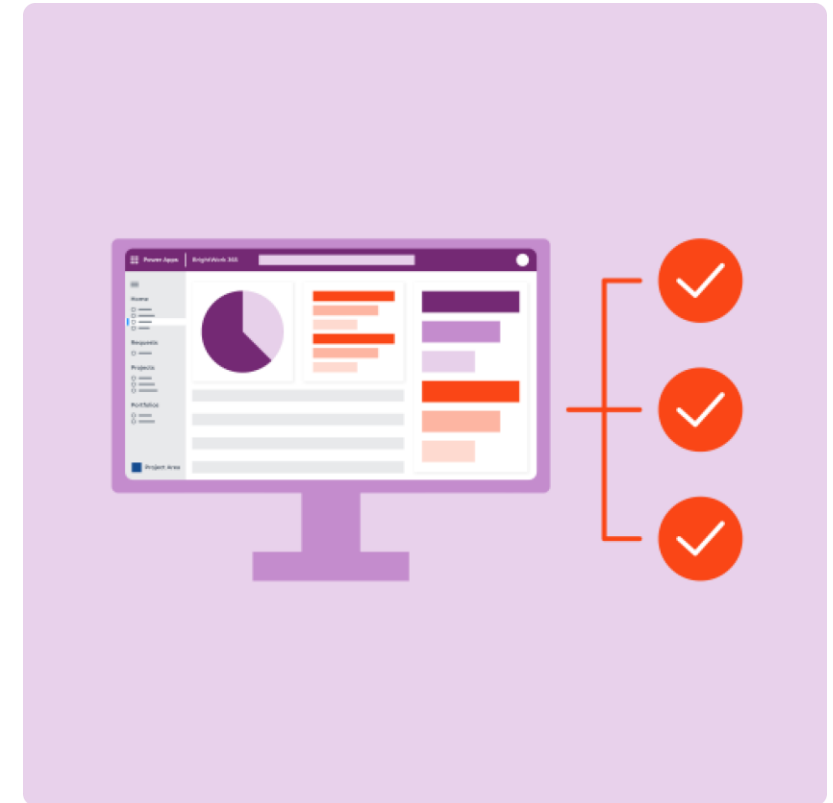
Questions

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Next Steps

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

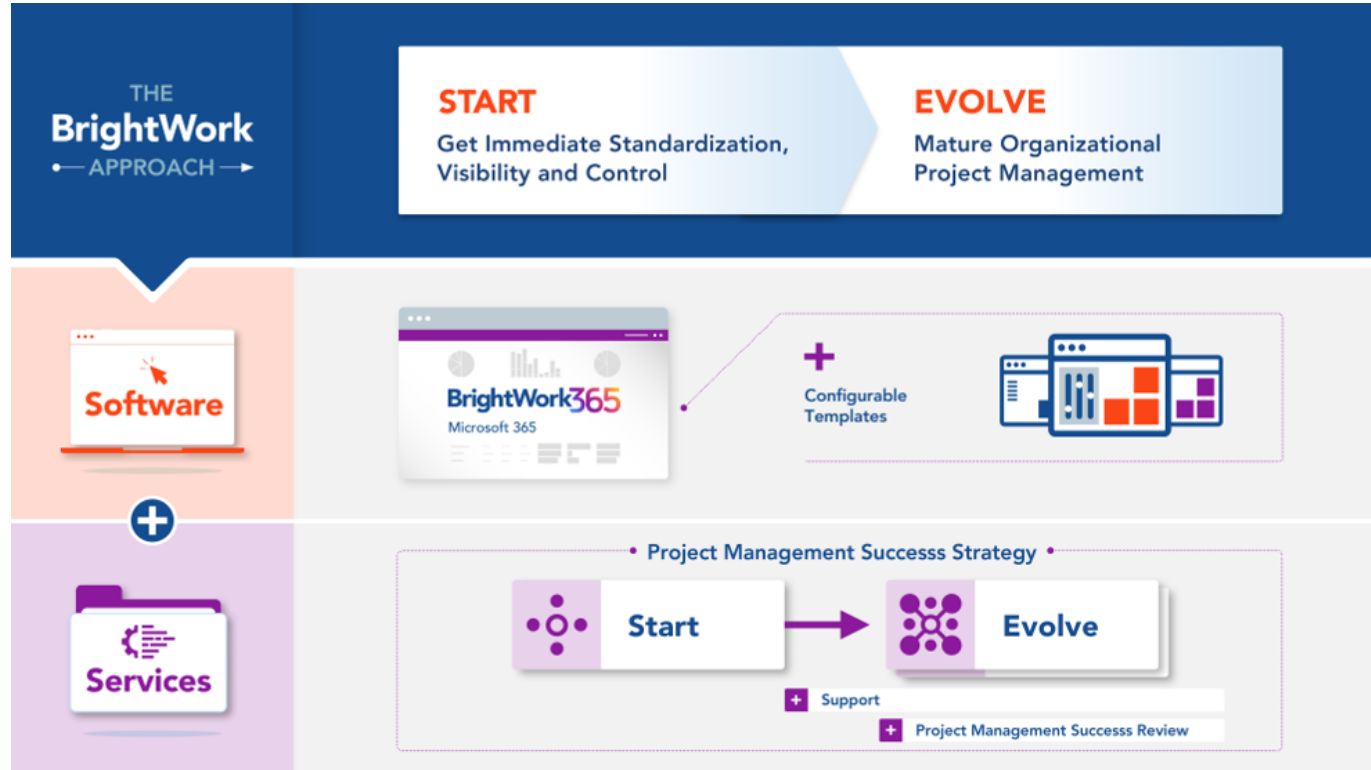### Adam Sheehan

Tel: +1 617 631 9825 or +353 91 412477

Email: asheehan@brightwork.com

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Appendix

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# 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.

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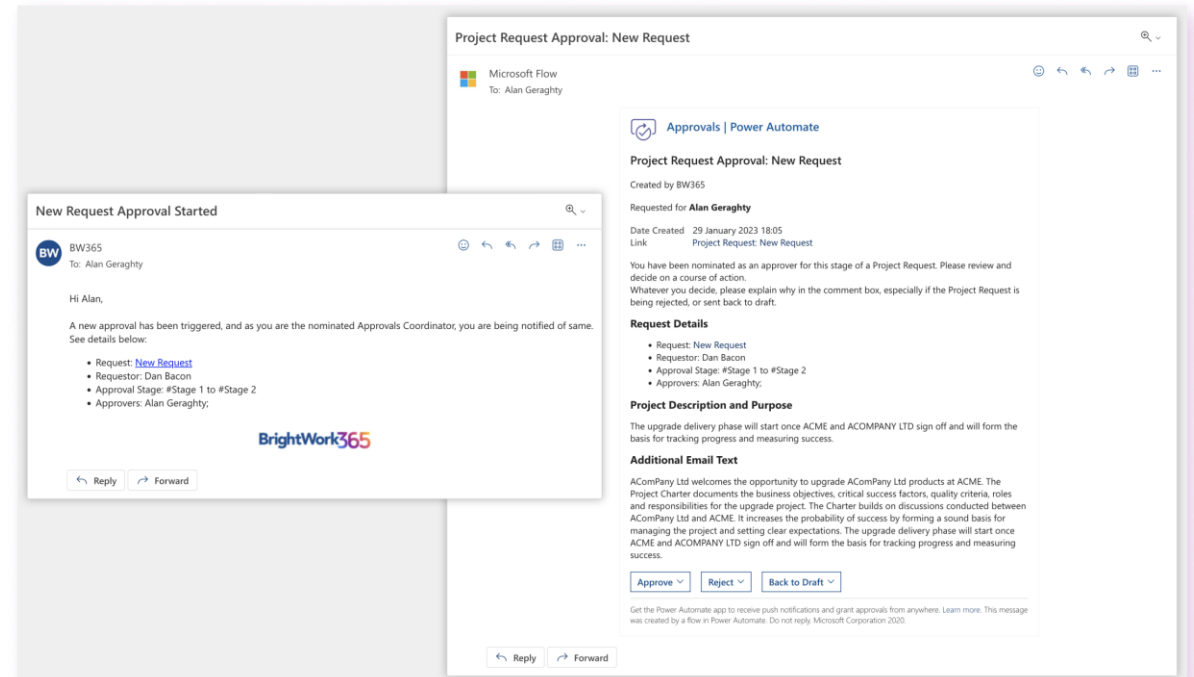
2. Manage Projects

**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.

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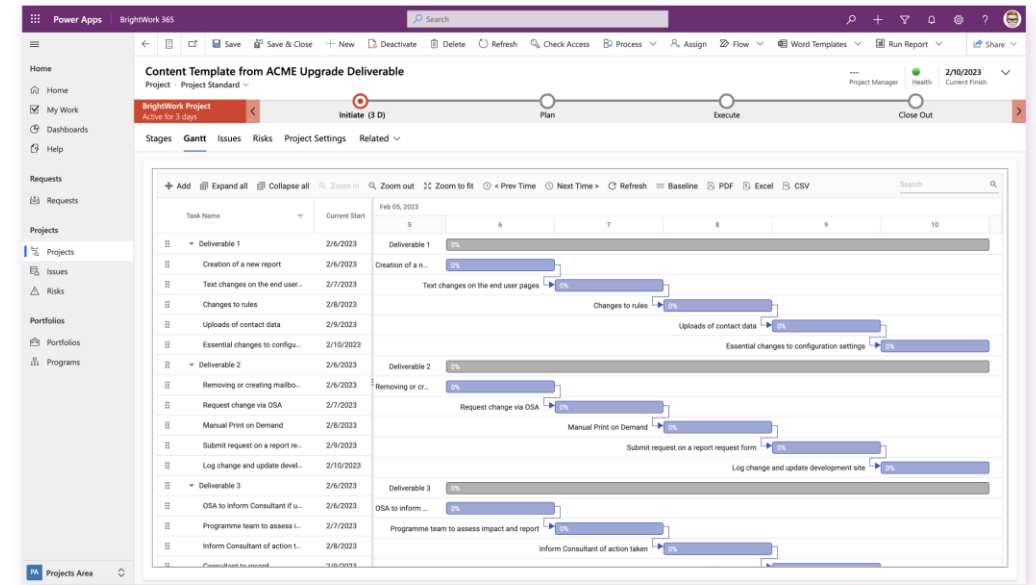
3. Control Portfolios

## 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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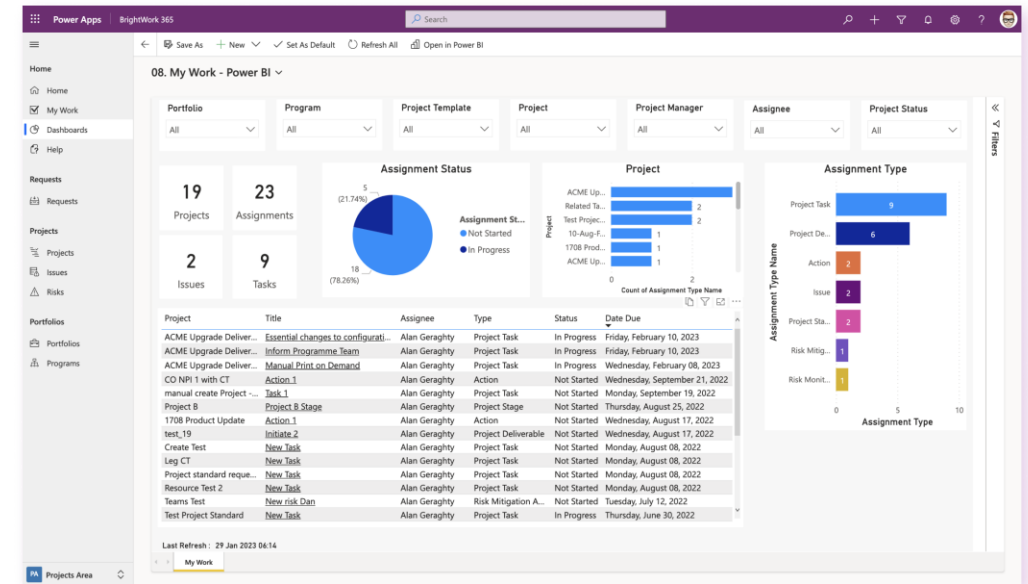
4. Improve Organizational PPM

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.
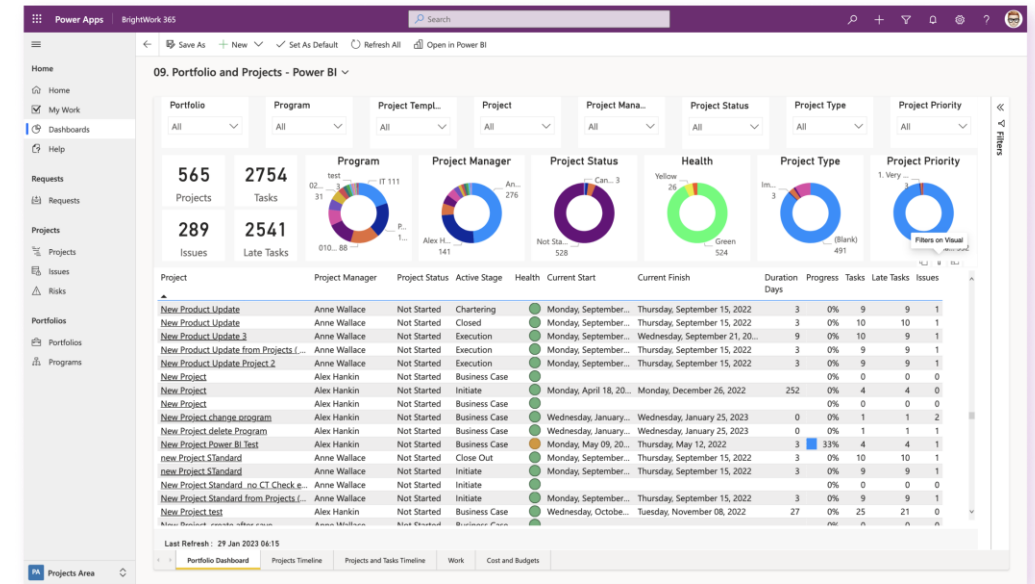
5. Leverage Microsoft 365

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

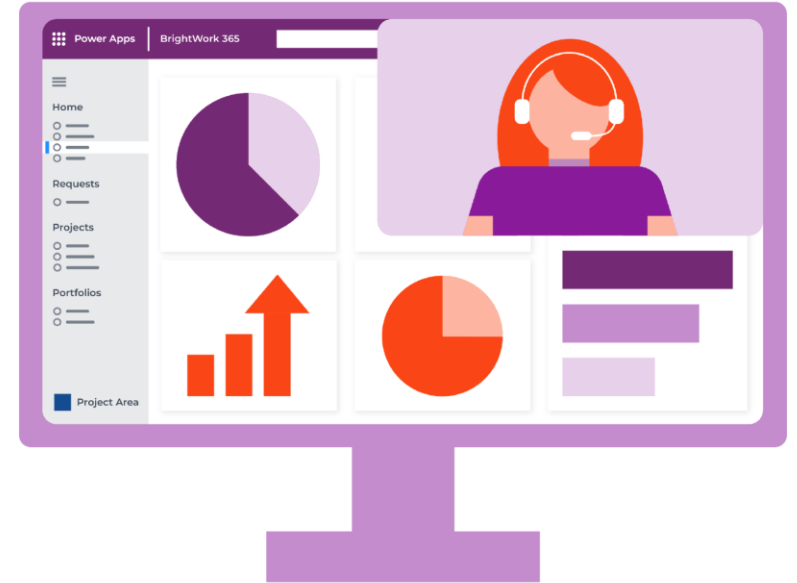BrightWork365

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

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BrightWork 365 Customer Success Stories