BrightWork365

Project and Program Management with Microsoft 365

What's New in BrightWork 365

Presented by

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Today's Topic: Project and Portfolio Management with Microsoft 365

Project and Portfolio Management on Microsoft 365 – an overview of BrightWork 365

Highlighting Some of the Recent Features:

1. **New Home Page Summary Data** for a quick overview of all projects, programs and requests in one place.

2. **Enhanced project, program and portfolio actions, costs, and communication logs** for increased control and collaboration.

3. **New Power App dashboards** to analyze critical portfolio data.

4. **Enhanced Power BI dashboards** for visual project reporting.

Live Questions & Answers!

Note: The agenda assumes questions throughout.

QUICK POLL

Why does your team wish to address Project and Portfolio Management?

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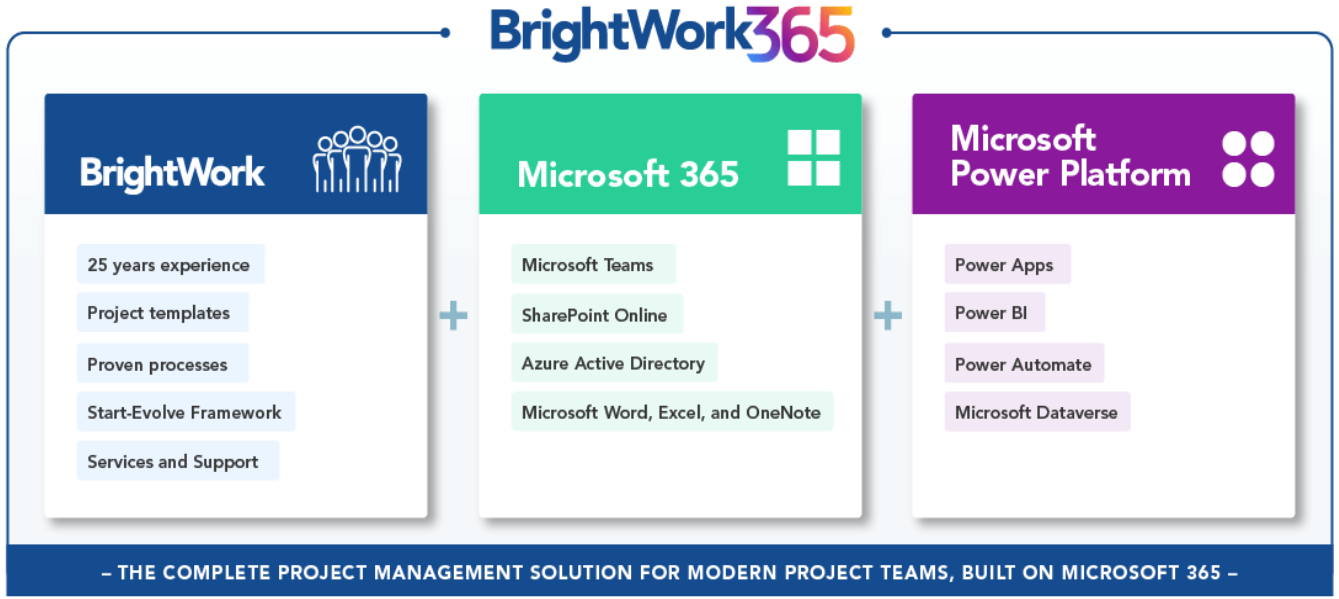
The "What"

The “How"



[BrightWork 365 Product page]

[BrightWork 365 Deployment page]

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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

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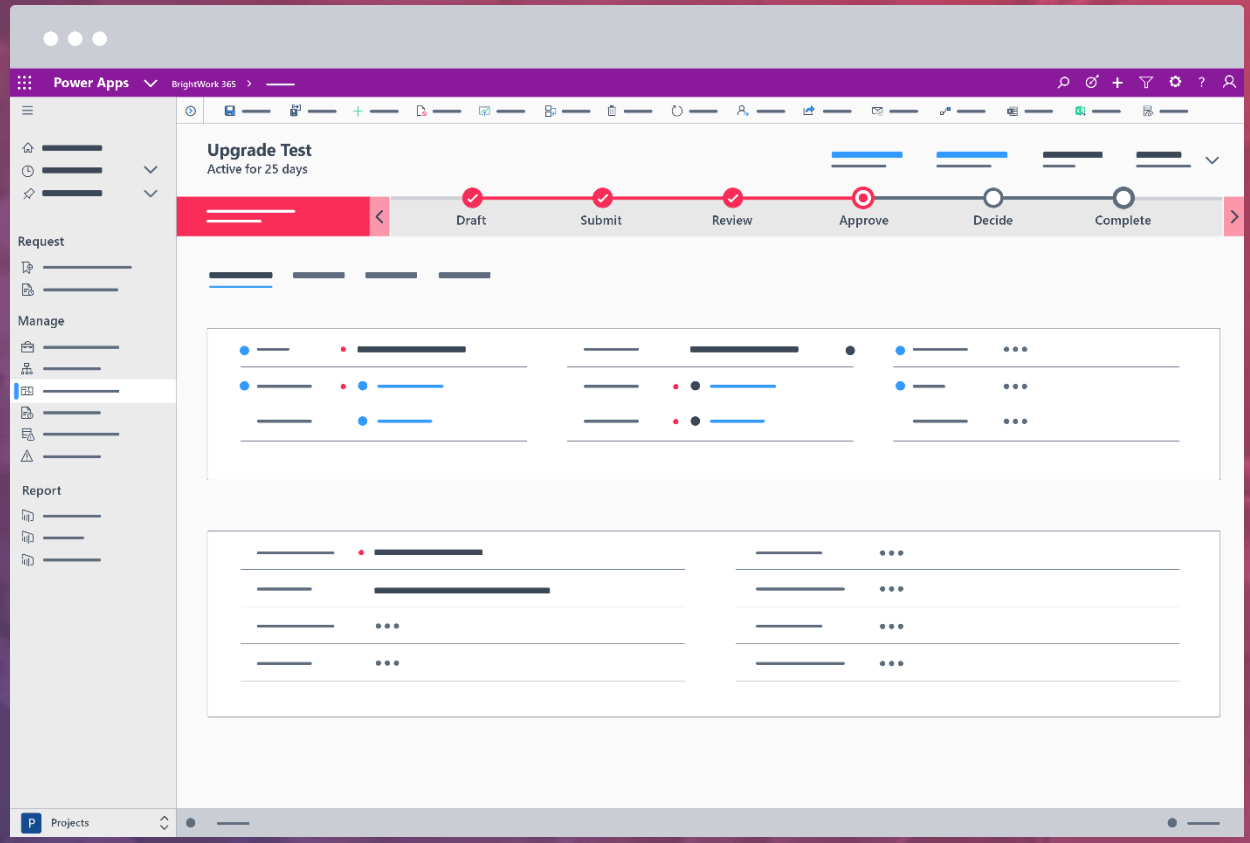
DEMO

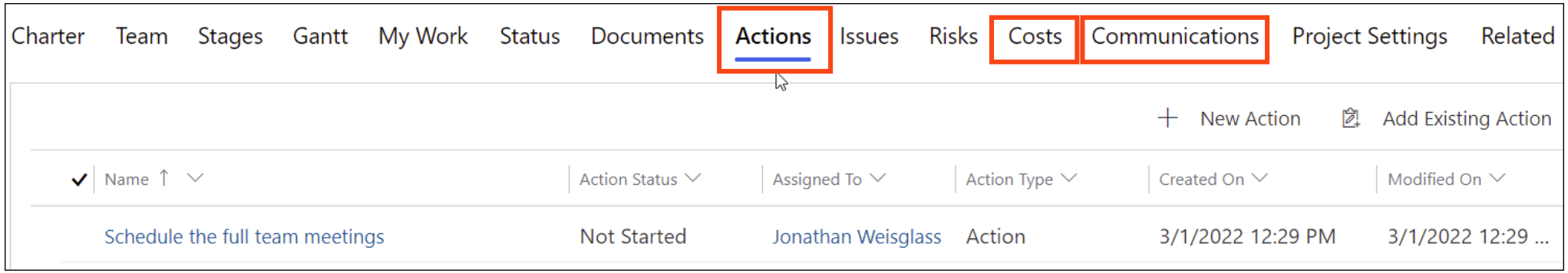
Project and Portfolio Management



Home Page Summary Data

We've added live metric data from across all app areas to the Home Page. Metric items link directly to their corresponding views.

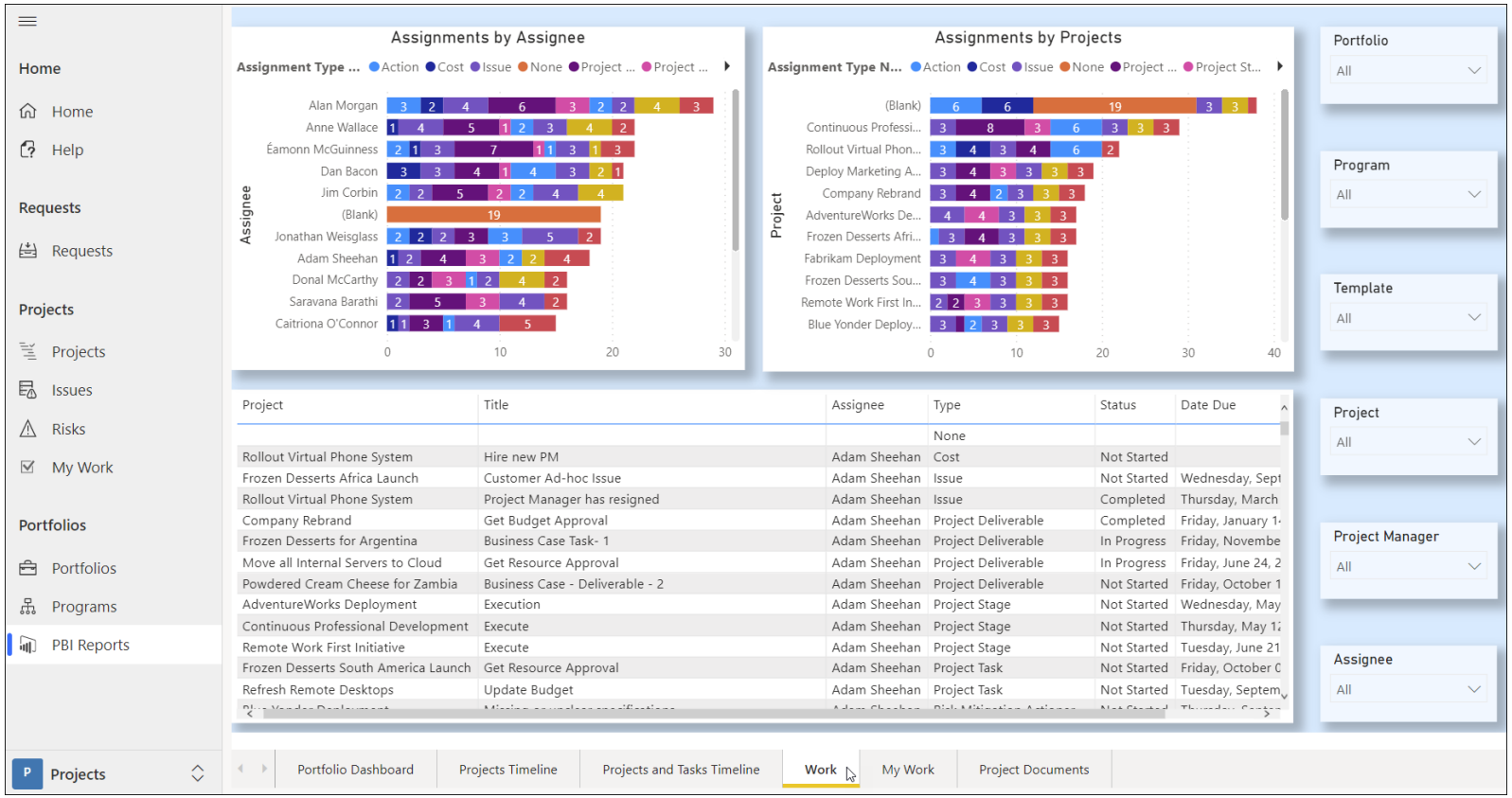
Project, Program and Portfolio Area Enhancements



Portfolio and Program Actions, Costs & Communications Logs give increased control of all aspects of projects.

A Program Schedule section has also been added to Portfolio and Program Status pages.

Power BI Enhancements



- Documents from Actions and Costs are now included in the Power BI Project Documents dashboard.
- Added an Active Stage column and a Project Status filter to Power BI dashboards so users can find projects that have specific criteria.
- Added Last Refresh Date information to report pages.

QUICK POLL

Does it look like BrightWork 365 might answer your Why?

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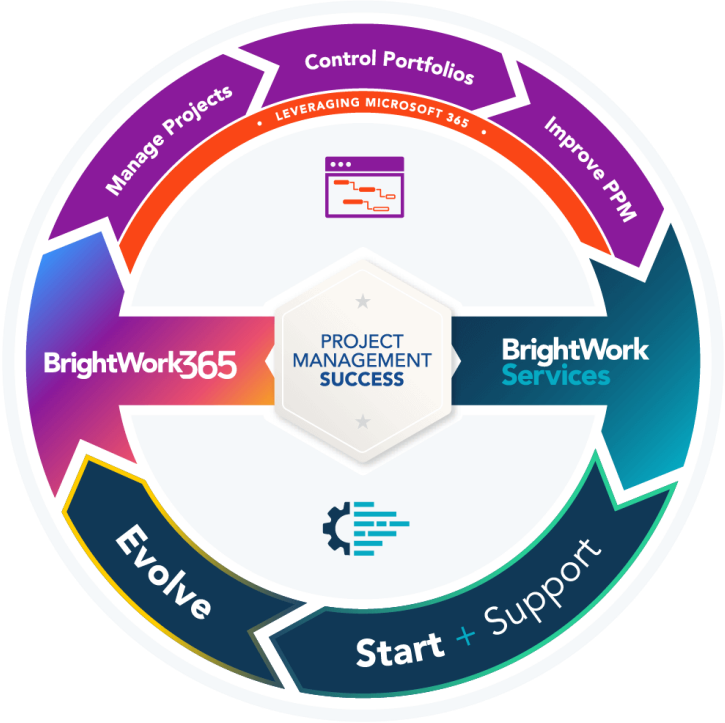
QUESTIONS?

- Use the Question panel to ask questions

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.

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THANK YOU

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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.

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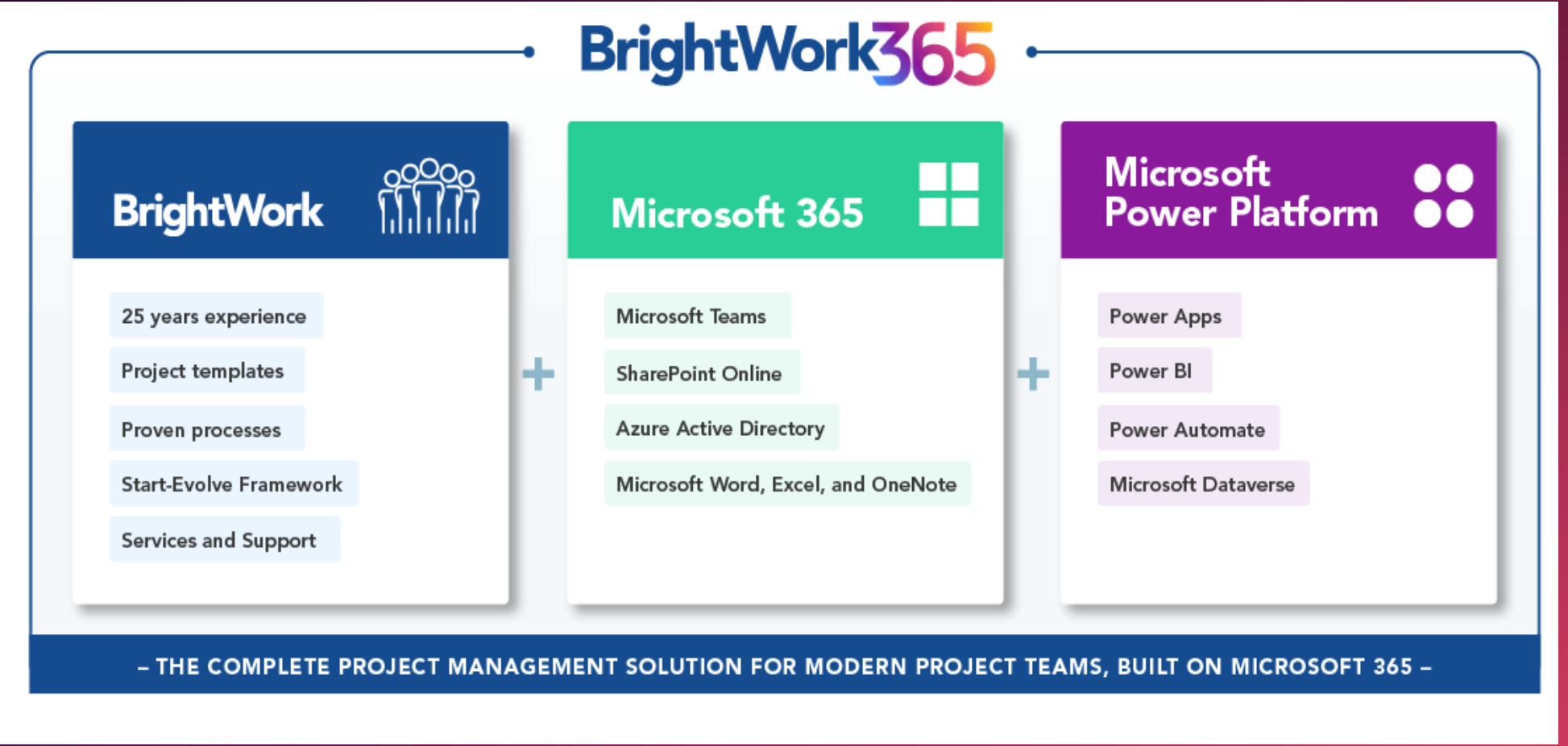
Introducing BrightWork 365: Project and Portfolio Management for Microsoft 365

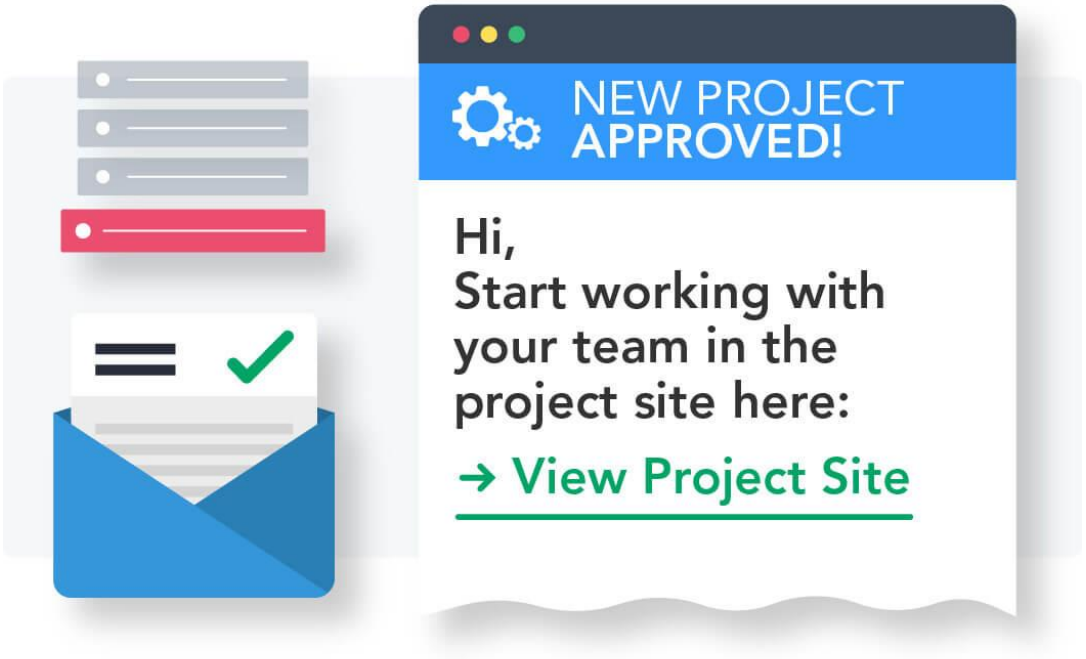


Introducing BrightWork 365 for Microsoft 365

- 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

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.



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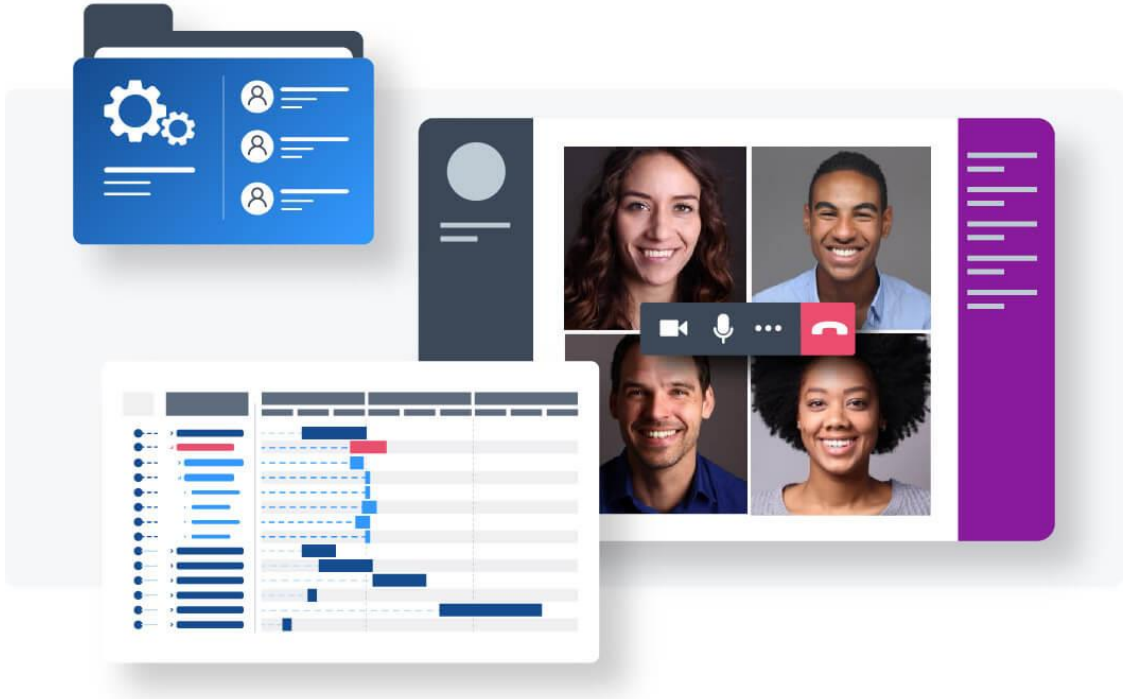
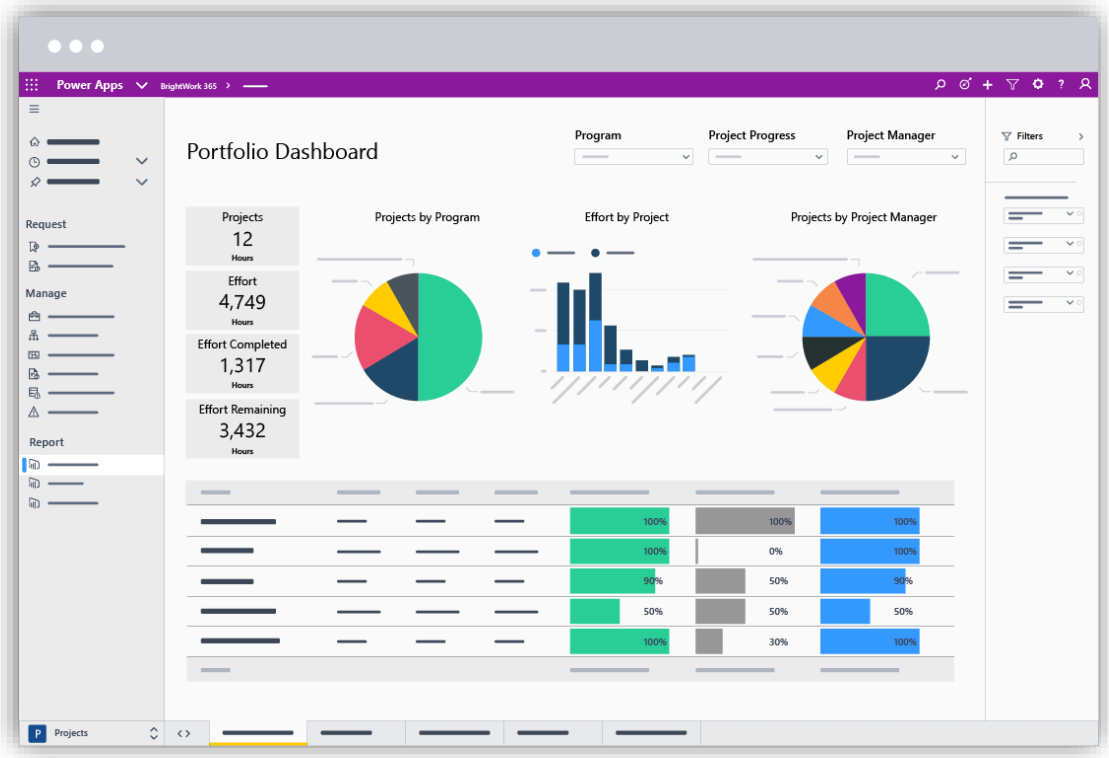
Manage Projects

- 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.

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BrightWork Customer Success stories