

BrightWork365

Mastering Project Task Management with Microsoft 365

Presented by



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BrightWork

Mastering Project Task Management with Microsoft 365

AGENDA:

- An overview of managing projects with BrightWork 365 on Microsoft 365
 - Project task management fundamentals - turning chaos into control
 - Building task lists and schedule timelines using visual Gantt charts
 - Managing Project Work such as Actions, Risks, and Issues that arise from your tasks
 - Q&A
-

Live Questions & Answers at the end!

A photograph of a group of people sitting around a table in a meeting, with a red overlay. The text "QUICK POLL" is centered in the image.

QUICK POLL

BrightWork 365 for Microsoft 365

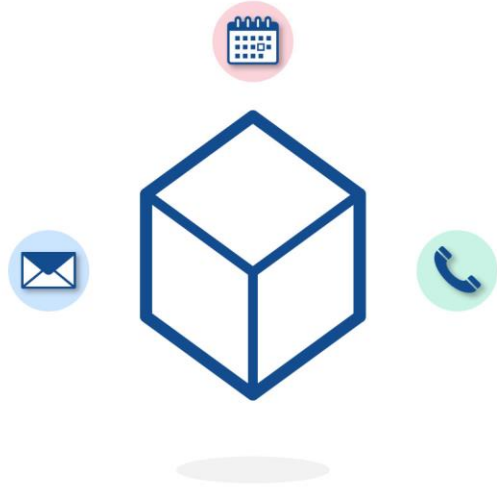
The "What"



The "How"

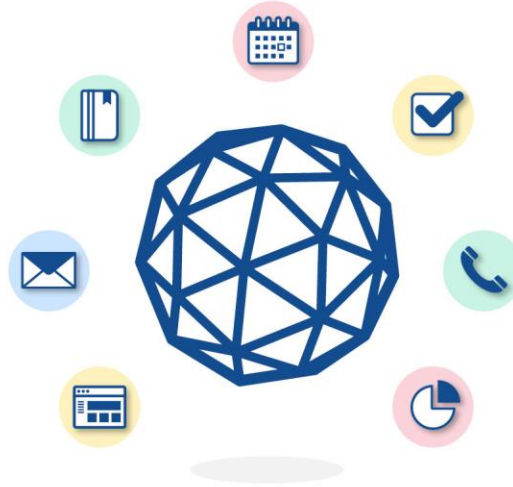


More "How"



START

Deliver Immediate
Visibility & Control



EVOLVE

Grow Organisational
Project Management

The BrightWork Approach

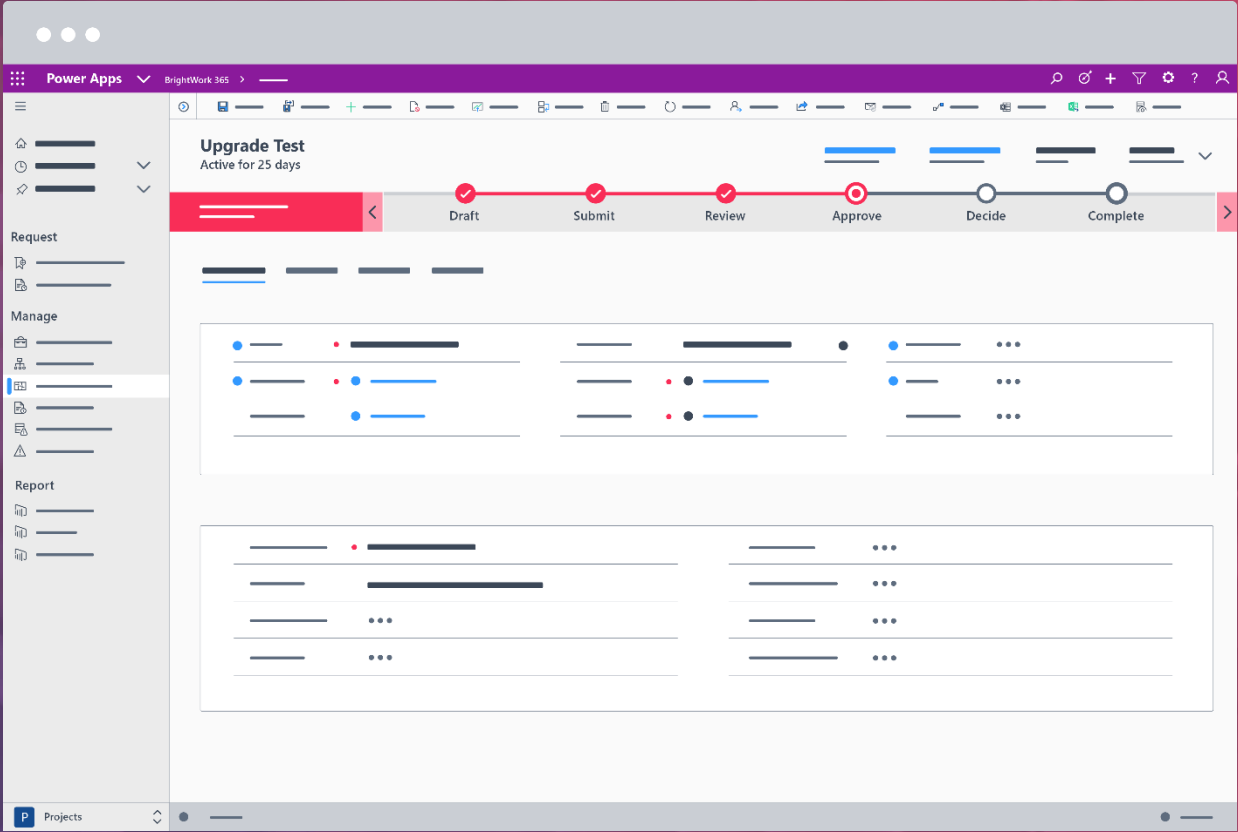
Built into our Product
with Templates

and

Designed into our
Deployment Approach with
Services

DEMO

Project and Portfolio Management



1. BUSINESS CASE

- 1.1. Interview stakeholders
- 1.2. Draft business case
- 1.3. Approve business case

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2. DEVELOPMENT

- 2.1.Requirements
 - 2.1.1. Gather requirements
 - 2.1.2. Document requirements (deliverable)
- 2.2.Create the Evolve Plan (deliverable)
- 2.3.Design product

3. SCALE-UP

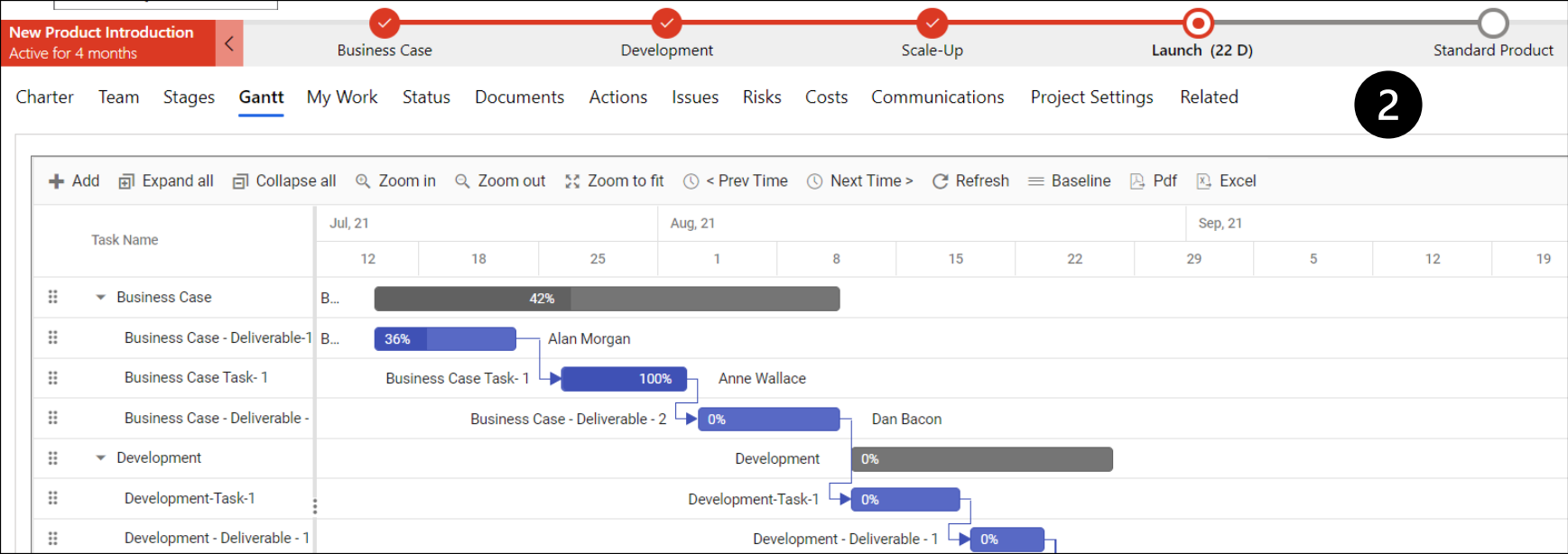
- 3.1.Configure templates
- 3.2.Review templates
- 3.3.Adjust templates

4. LAUNCH

- 4.1.Create Training Plan (deliverable)
- 4.2.Conduct training
- 4.3.Rollout the product
- 4.4.Support the product

5. STANDARD PRODUCT

- 5.1. Sign-off
- 5.2. Lessons Learned
- 5.3. Close project



2

Documents Actions Issues Risks Costs Communications **Project Settings** Related

Reset Target Dates in all Project Tasks ☐ No ☒ Yes

Create Teams Channel ☐ No ☒ Yes

Reset Target Dates in all Project Tasks - Copy Current Start and Current Finish dates in Project Tasks to Target Start and Target Finish dates to reset baselines in the Gantt

3

QUESTIONS?

➤ Use the Question panel to ask questions

THANK YOU



For sales info contact:

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Our mission is to:

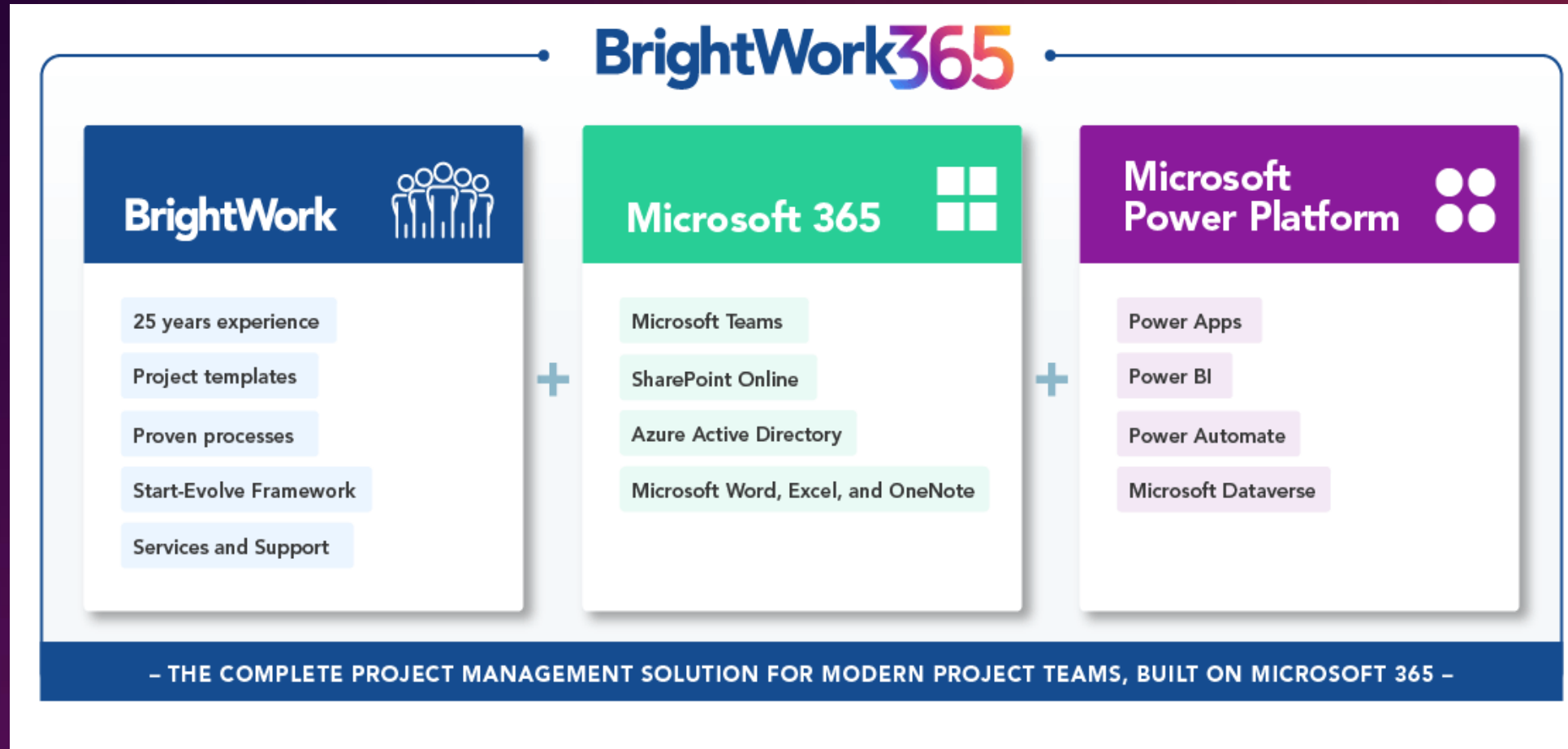
Make Project and Portfolio
Management with Microsoft
SharePoint and Microsoft 365
easier for our customers.

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:

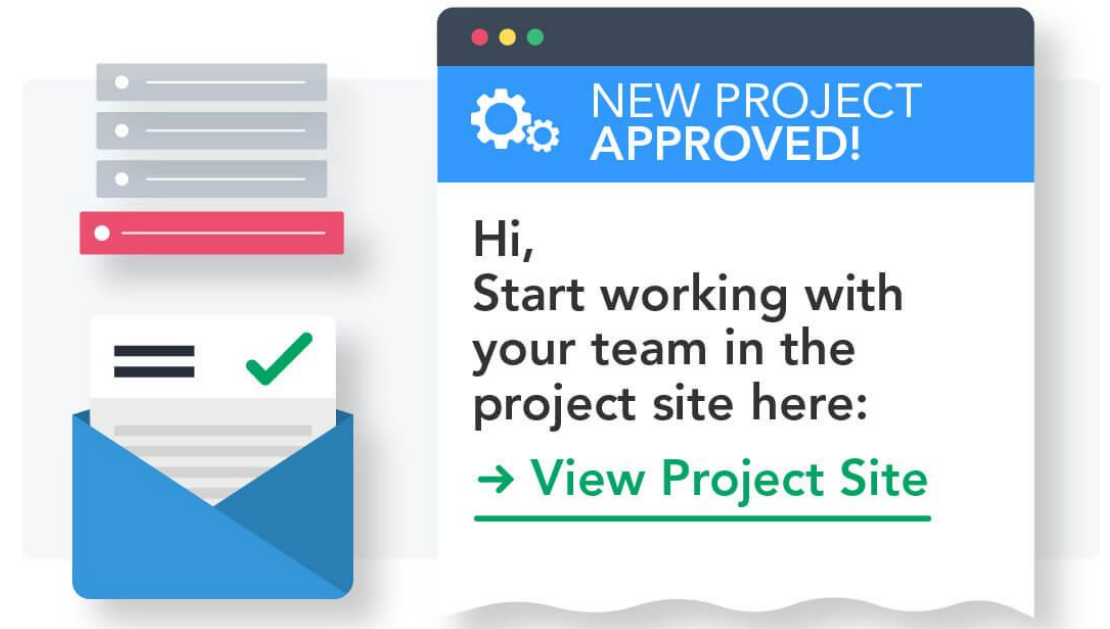
- A pre-evaluation of your Microsoft 365 solution to facilitate a smooth upgrade process.
- Providing on-hand technical assistance during the upgrade process.
- Updating any processes to leverage and new features of the latest release.

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.

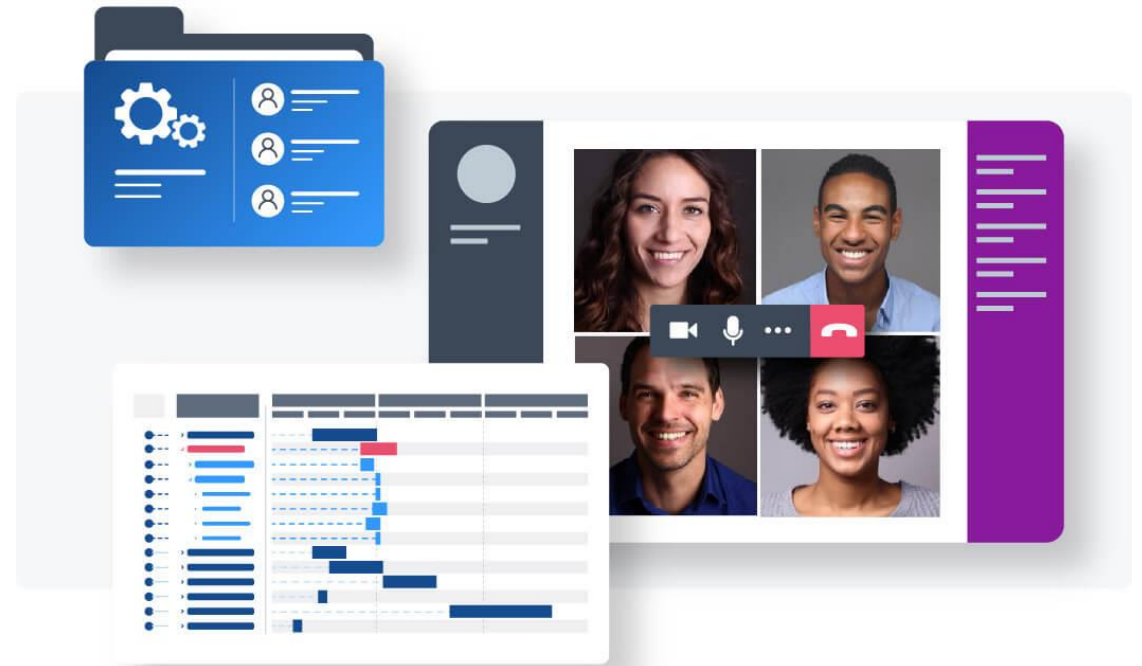
Project Requests

- 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.



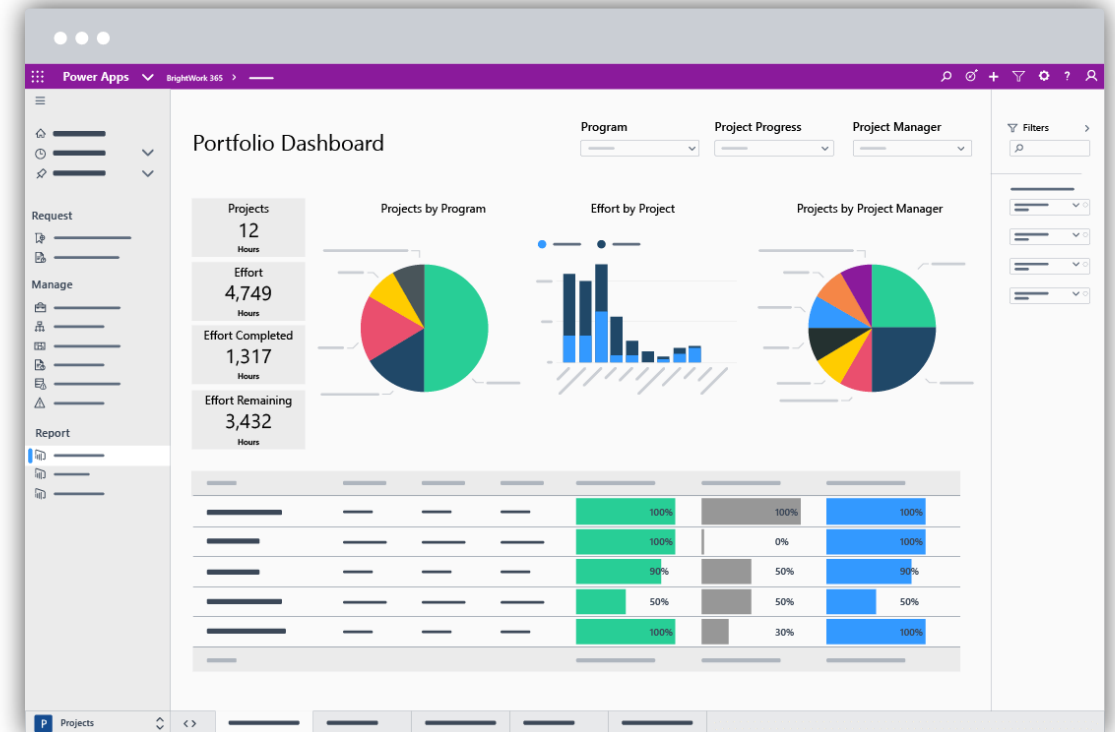
Manage Projects

- 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