

BrightWork365

Project Management Best Practices With Microsoft 365

Presented by



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Project Management Best Practices With Microsoft 365

AGENDA:

- 1. Brief Overview of BrightWork 365 on Microsoft 365**
- 2. Custom Forms, Business Process Flows**
- 3. Projects: Risk Management, Baselines, Content Templates (with sample risks, etc.)**
- 4. Improving People Management with Communications, Microsoft Teams, OneNote, My Work**

Live Questions & Answers at the end!



QUICK POLL

**Are you currently using Microsoft 365
for Project Management?**

BrightWork 365 for Microsoft 365

The "What"



The "How"



[BrightWork 365 Product page](#)

[BrightWork 365 Deployment page](#)

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

The screenshot displays a Power Apps interface for a project titled "Upgrade Test", which is active for 25 days. The interface features a purple header with the "Power Apps" logo and navigation icons. A central workflow bar shows six stages: Draft, Submit, Review, Approve, Decide, and Complete. The "Draft" stage is currently active, indicated by a red checkmark and a red bar. Below the workflow bar, there are two main content areas. The top area contains a grid of task cards, each with a blue dot and a horizontal bar representing progress. The bottom area contains a list of items, each with a horizontal bar and a three-dot menu icon. On the left side, there is a navigation pane with sections for "Request", "Manage", and "Report", each containing several icons. The bottom status bar shows a "Projects" tab.

Custom Forms, Business Process Flows

Name	* Project Standard
Description	This template is for requesting and managing projects that have a reasonably mature amount of project management process applied.
Request Business Process Flow	*  Project Request 1 Stage
Request Form	*  Project Request 1 Stage

Risks, Baselines, Content Templates

Frozen Desserts South America Launch - Saved
Project · Project Standard ▾

Adam Sheehan
Project Manager

Marketing
Program

Health

10/22/2021
Current Finish

BrightWork Project
Active for 9 months

Initiate (9 Mo) Plan Execute Close Out

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

Name	* Frozen Desserts South...	Portfolio	* Contoso Projects	Created On	9/22/2021
Project Reference	Proj-001044	Program	* Marketing		8:48 AM

Improving People Management

The screenshot shows a project management interface with a timeline at the top. The timeline has three milestones: 'Scale-Up (7 Mo)', 'Launch', and 'Standard Product'. Below the timeline is a navigation bar with tabs: 'Actions', 'Issues', 'Risks', 'Costs', 'Communications' (which is underlined), 'Project Settings', and 'Related'. A dropdown menu is open from the 'Communications' tab, listing options: 'Activity', 'Appointment', 'Email', 'Phone Call', 'Note', and 'OneNote'. There are also icons for adding, filtering, and sorting items.



My Work* Edit columns Edit filters

Assignment Title	Created By	Project	Assignme...	Assignme...	Portfolio	Program	Due D
Schedule meeting rooms	Donal McCarthy ...	Remote ...	Action	Not St...	Contoso ...	Company...	4/26/
Launch - Deliverable- 1	Jonathan Weisgl...	Frozen D...	Project...	Not St...	Contoso ...		5/10/

QUESTIONS?

➤ Use the Question panel to ask questions

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.





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:

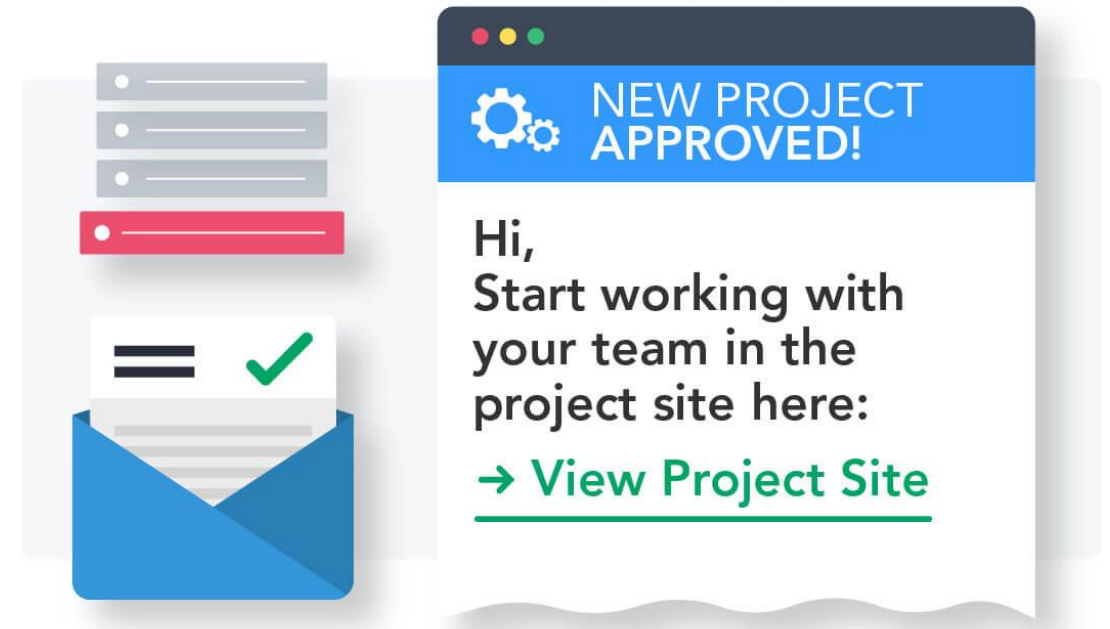
- A pre-evaluation of your Microsoft 365 solution to facilitate a smooth upgrade process.
- Providing on-hand technical assistance during the upgrade process.
- Updating any processes to leverage and new features of the latest release.

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.

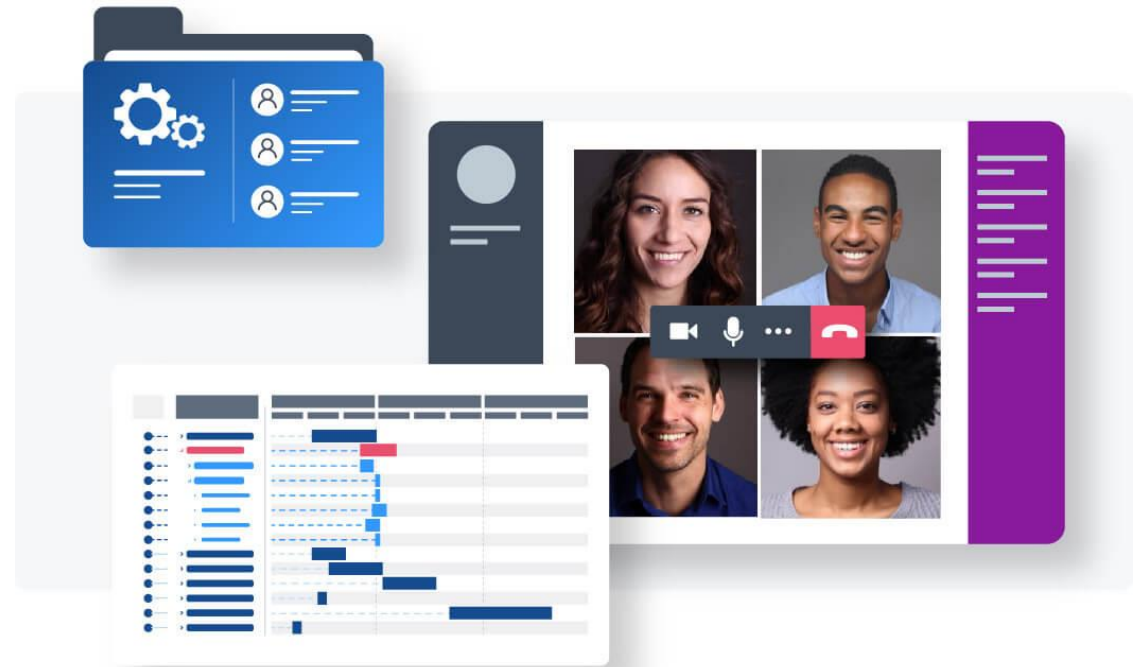
Project Requests

- 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.



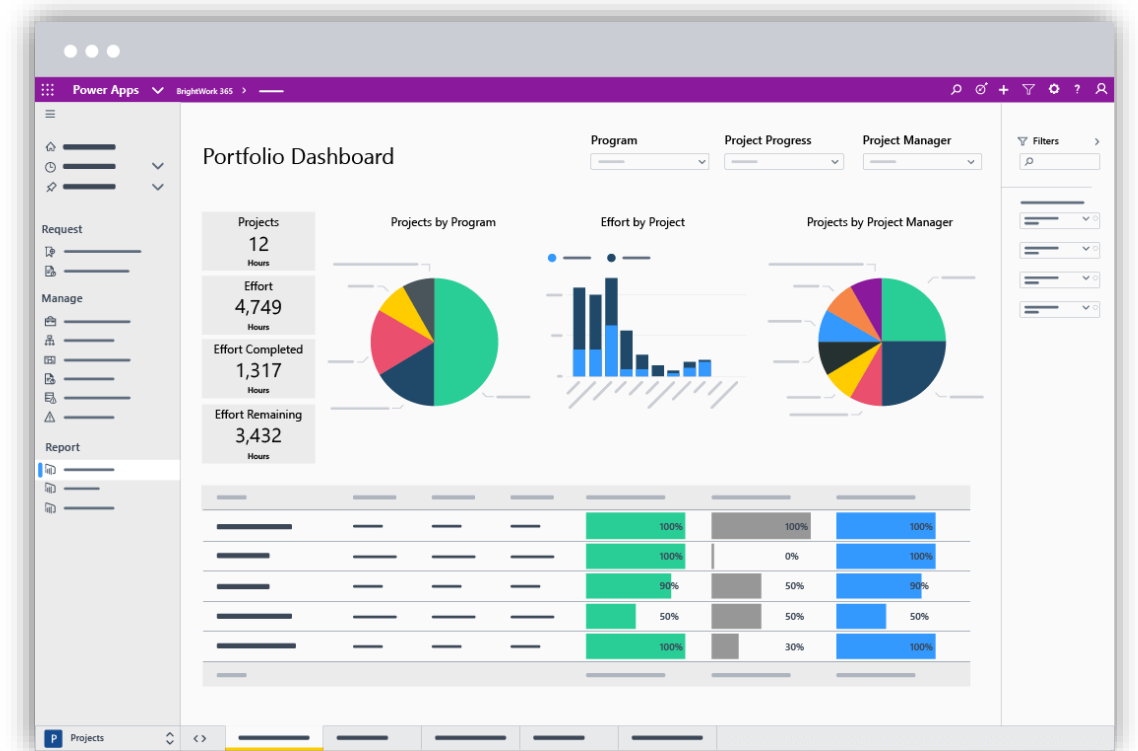
Manage Projects

- 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

