

# **Creating a Centralized PPM (Project and Portfolio Management) Solution with Microsoft 365**



#### **Presented By**

Éamonn McGuinness

BrightWork Product Manager

# **Quick Poll**

# Are you using Microsoft 365 for Project and Portfolio Management?



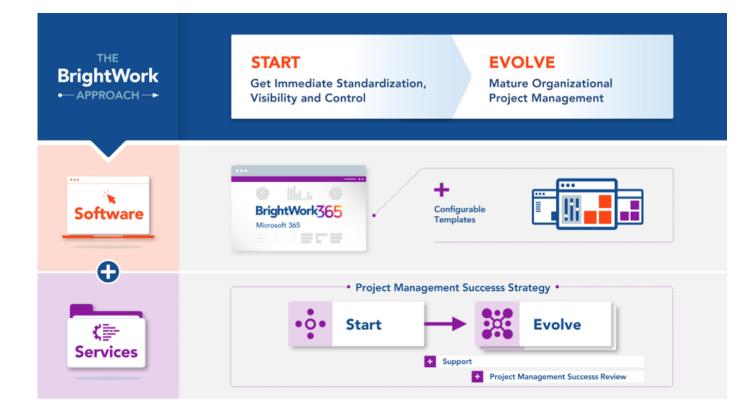
# Introducing BrightWork 365 Solution

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

BrightWork		Microsoft 365		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



## **Session / Demo Overview**

- **1. Start** Start with a Project Management Strategy and the right amount of Project Management templates and processes to enable quick success.
- 2. First Evolve Evolve your processes with project templates and portfolio and program dashboards.
- **3. Second Evolve** Mature your approach to ensure repeatable success by optimizing your project pipeline.





Project Management Success Strategy starts you on your journey

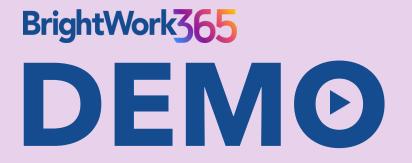
1. Project Light template gives a project managers control over

- Charter
- Status
- Team
- Gantt
- My Work
- Documents

2. My Work allows team members collaborate easily on projects.

3. Portfolios and Programs give cross-project visibility to senior managers







# **First Evolve**

Project Management Success Review revisiting and revising your Project Management Success Strategy.

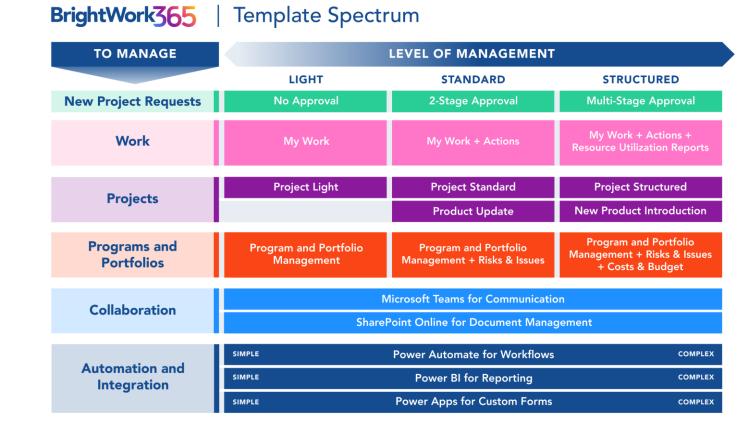
1. Project Standard (Project Managers and Project Teams – Project Management Maturity) has all of Project Light, plus much more, including

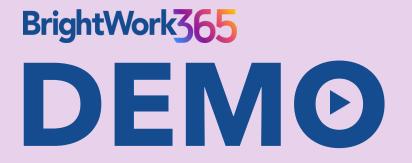
- Status Reports,
- Actions
- Issues

2. Project Structured (Project Managers and Project Teams – Project Management Maturity) has all of Project Standard, plus much more, including

- Risks,
- Costs
- Communications

3. Power BI Reports dashboard (Senior Management - Visibility) includes detailed interactive reports related to various elements of the system including Portfolios, Programs, Templates, Projects, and Project Managers.







# **Second Evolve**

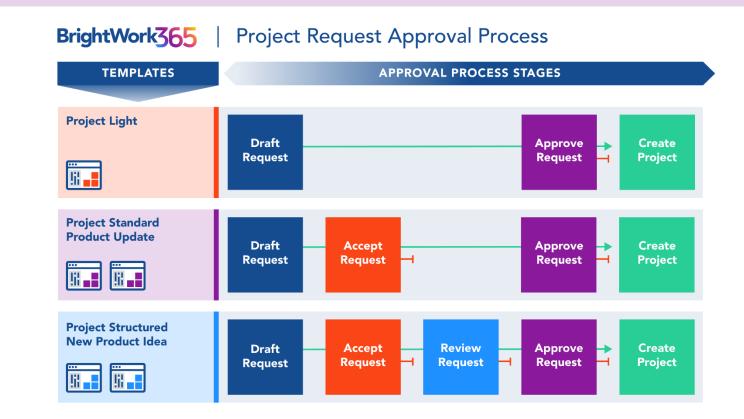
Project Management Success Review revisiting and revising your Project Management Success Strategy.

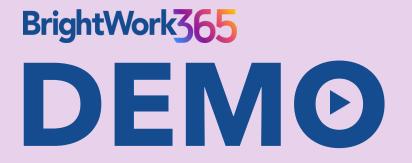
 Project Request Management (Project Management Office -Governance) ensures you get the right info to the right people for decision making.

• Approve projects and create automatically with PM templates.

2. Resource Utilization Dashboard (Senior Management - Visibility) focusses on one or more users to see if they are under or over-utilized.

3. Templates Configuration (Project Management Office - for Project Teams - Standardization) gives the ability to configure templates, adjusting the amount of process in projects and focusing on the more relevant project elements.







# **Concluding Poll**

Would you now consider using BrightWork 365 in your Microsoft 365 environment, to create a centralized PPM (Project and Portfolio Management) Solution?



# Questions





# THANK YOU!



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BrightWork Product Manager

### **Next Steps**

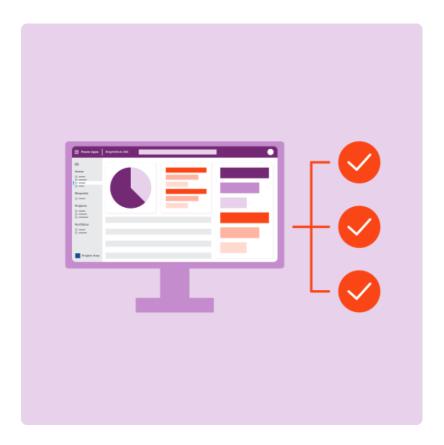
#### For discussion, more ideas and Q&A, contact us!



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**Email:** asheehan@brightwork.com

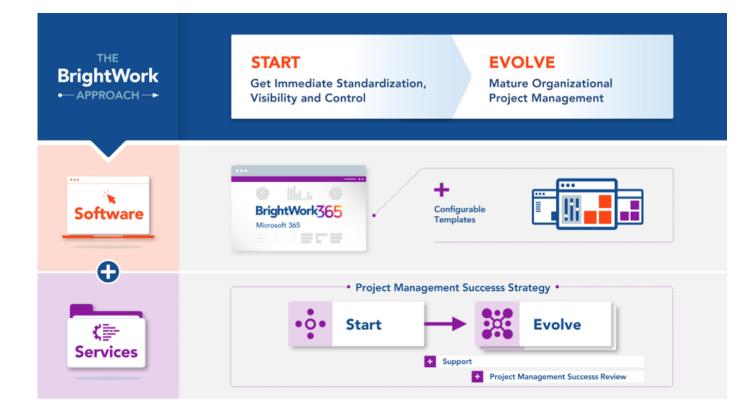




# Appendix



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



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

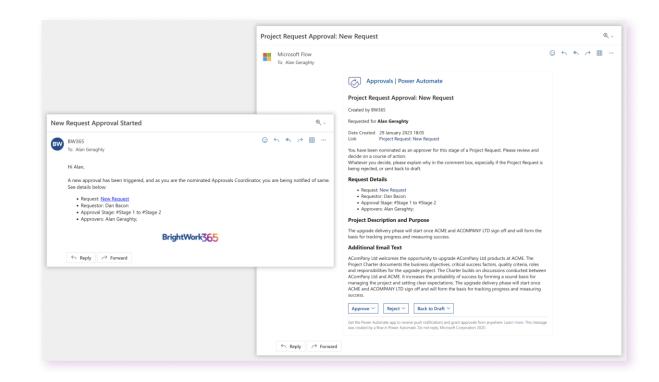
- Software with Configurable Templates
- Deployment Process
- Personalized Services



### **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.

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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.

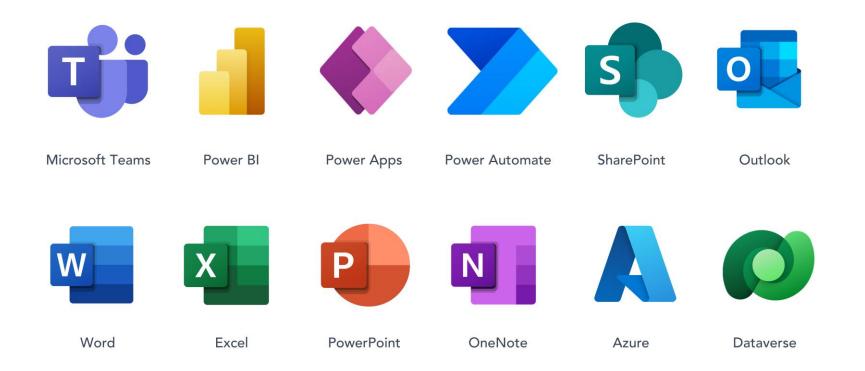
- Collaborate with your dedicated Customer Success Partner(s) to address your current PPM needs and to action towards desired goals.
- Get experts to review and evolve your PPM Success Strategy.
- Get access to new features of BrightWork 365 with every new release.
- Add new best-practice templates to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

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## 5. Leverage Microsoft 365

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





# **BrightWork 365 Personalized Services**

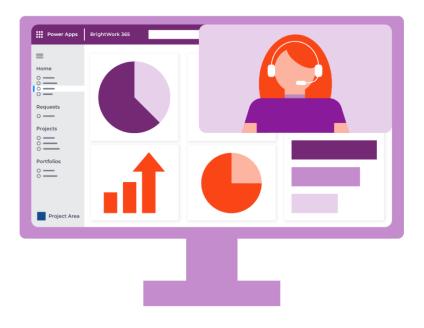
#### **Continuous support in deployment, review, and strategy**

#### **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**



















