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

Presented By

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BrightWork Product Manager

Quick Poll

Are you using Microsoft 365 for Project and Portfolio Management?

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Introducing BrightWork 365 Solution

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

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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

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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.

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Start

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

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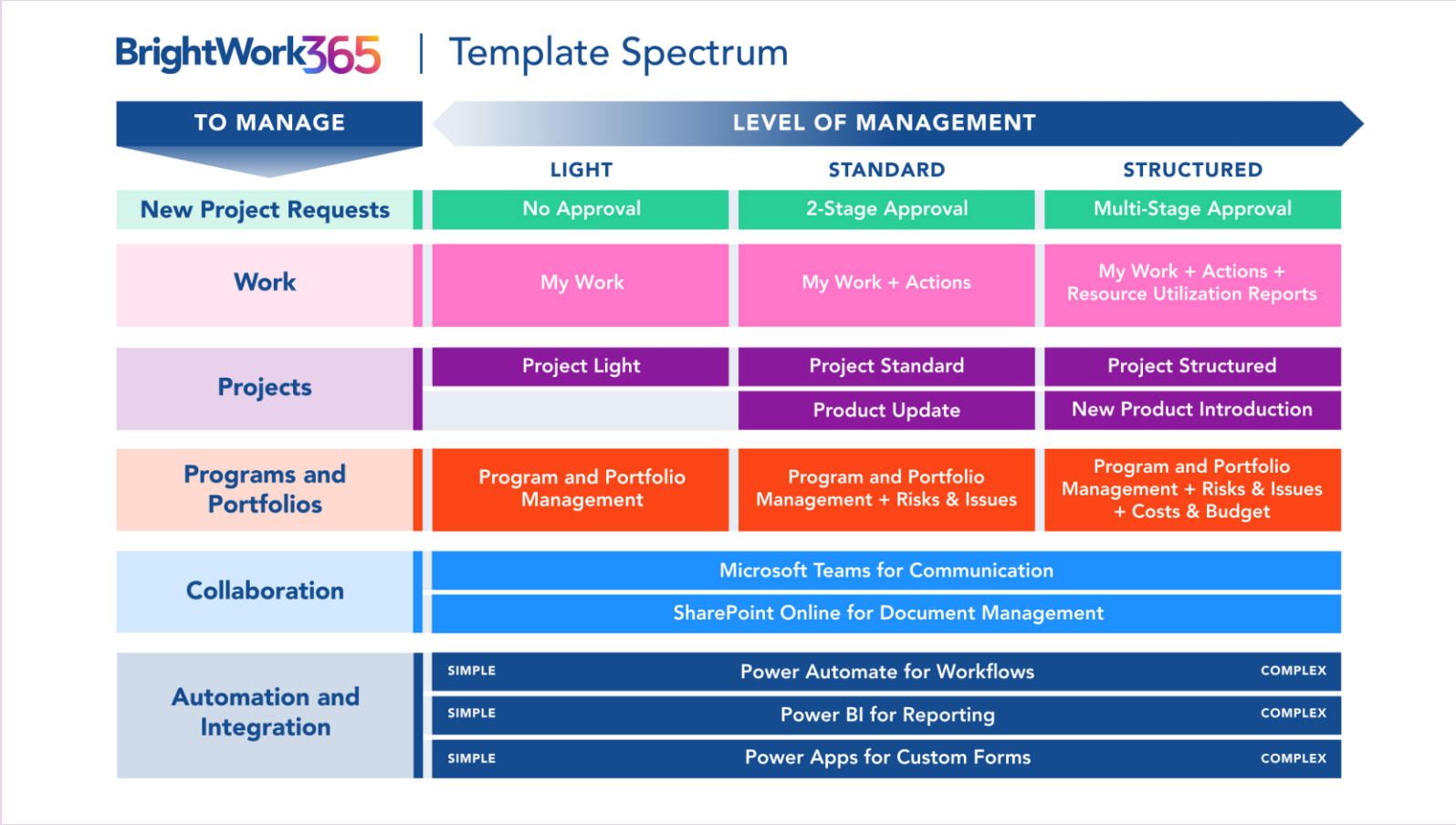
First Evolve

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.



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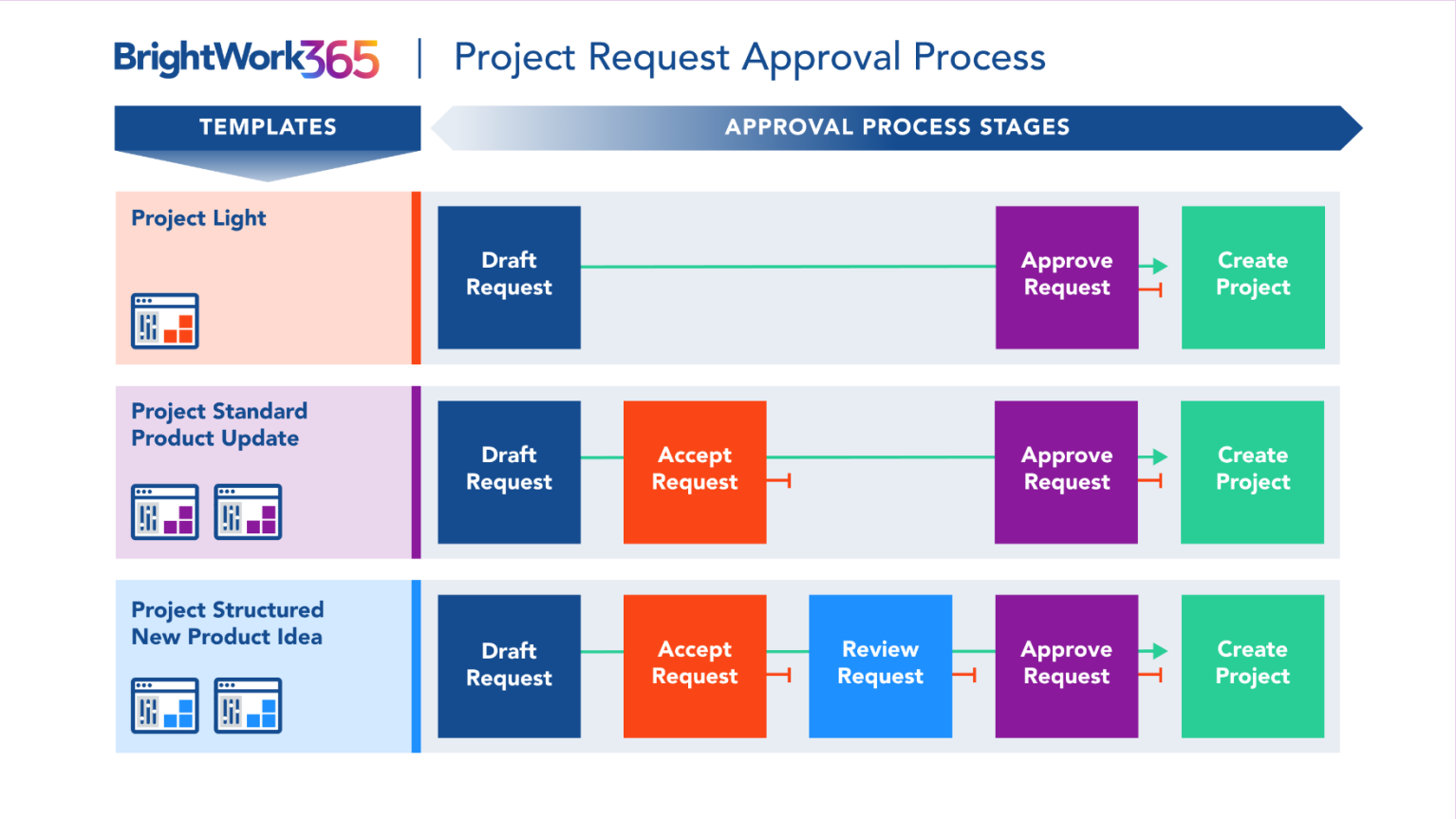
Second Evolve

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

1. 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.



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Concluding Poll

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

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Questions

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THANK YOU!

Presented By

Éamonn McGuinness

BrightWork Product Manager

Next Steps

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

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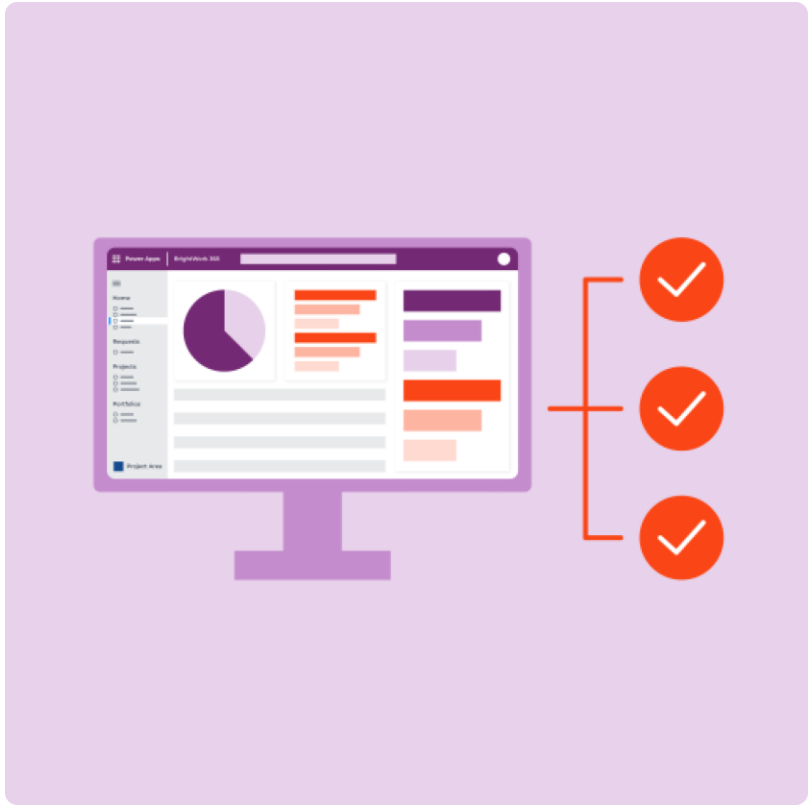

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Appendix

BrightWork Project Management Success Approach: Start-Evolve

It is a core element in our:

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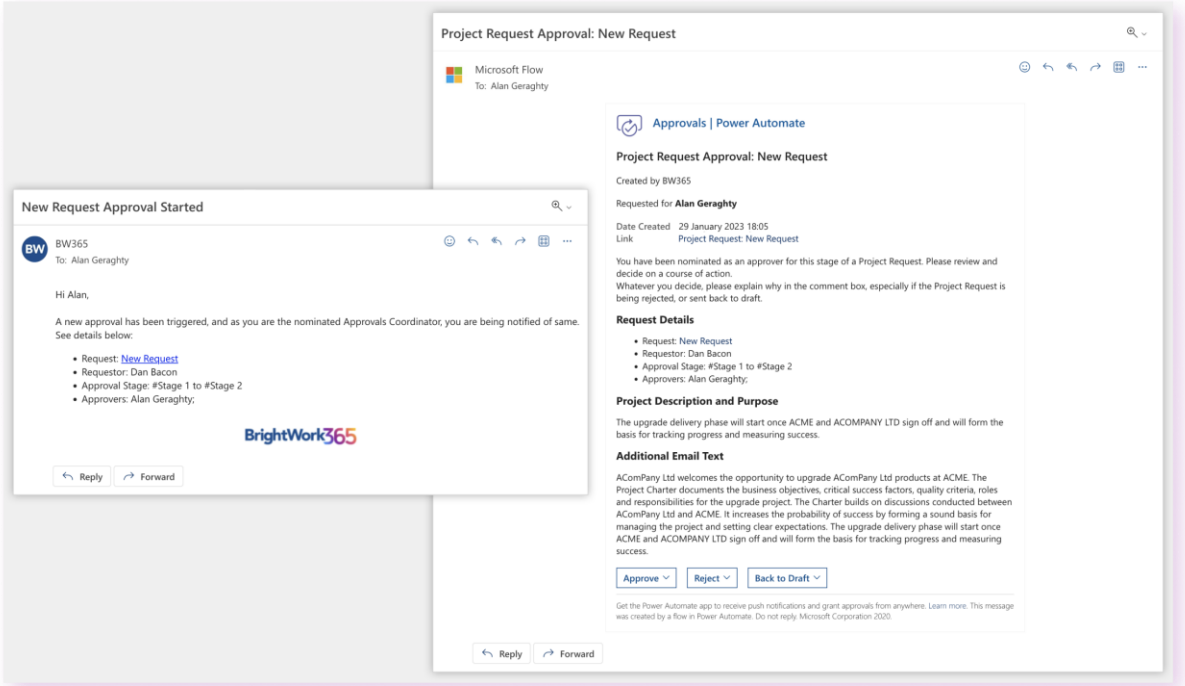
1. Process New Project Requests

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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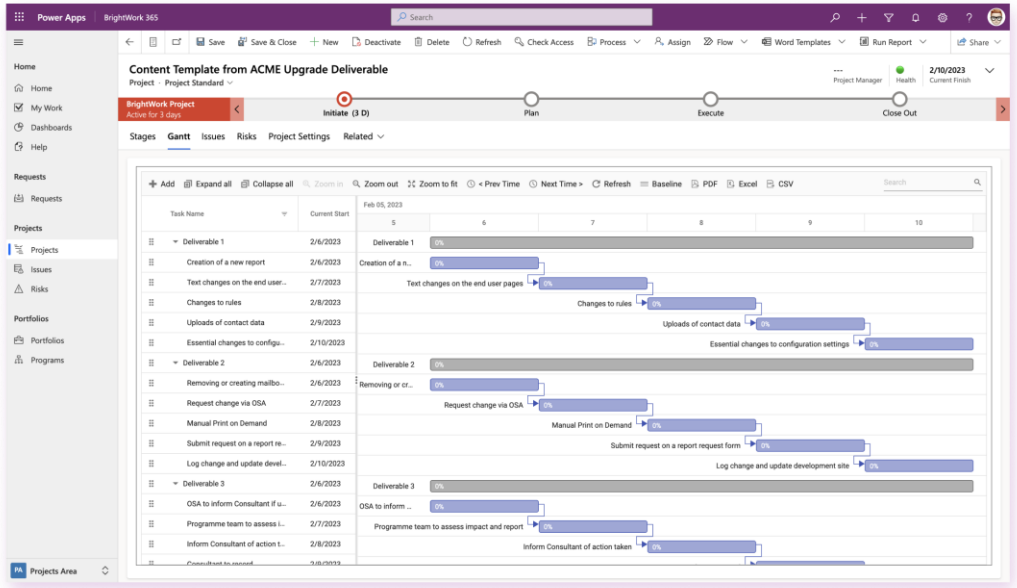
2. Manage Projects

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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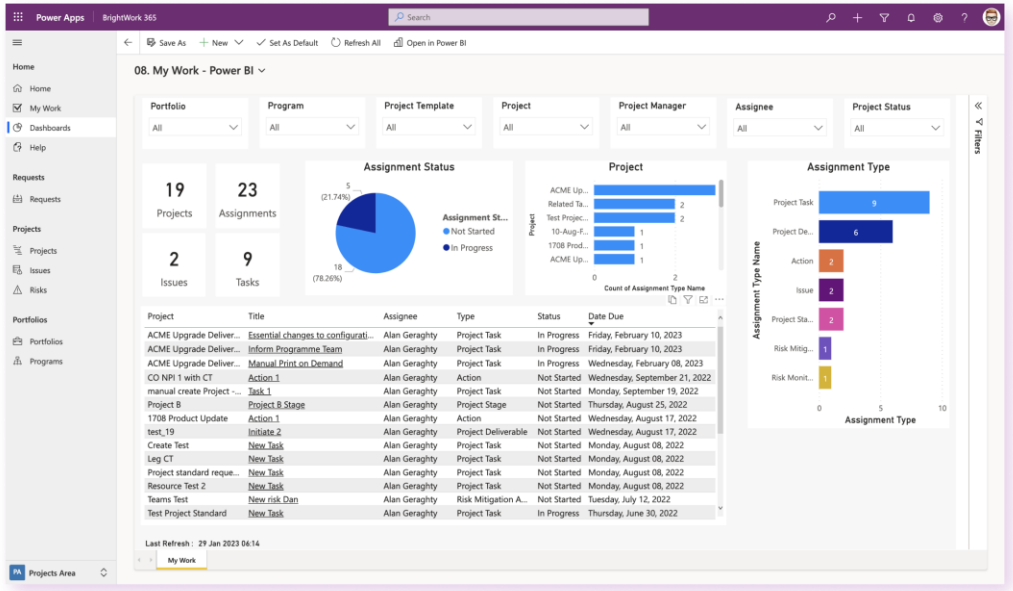
3. Control Portfolios

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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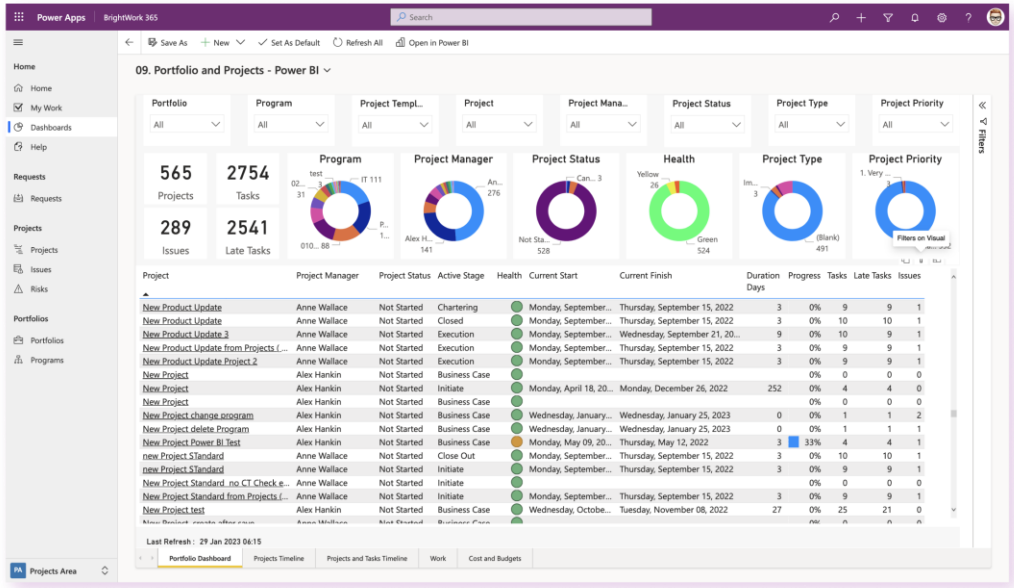
4. Improve Organizational PPM

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.



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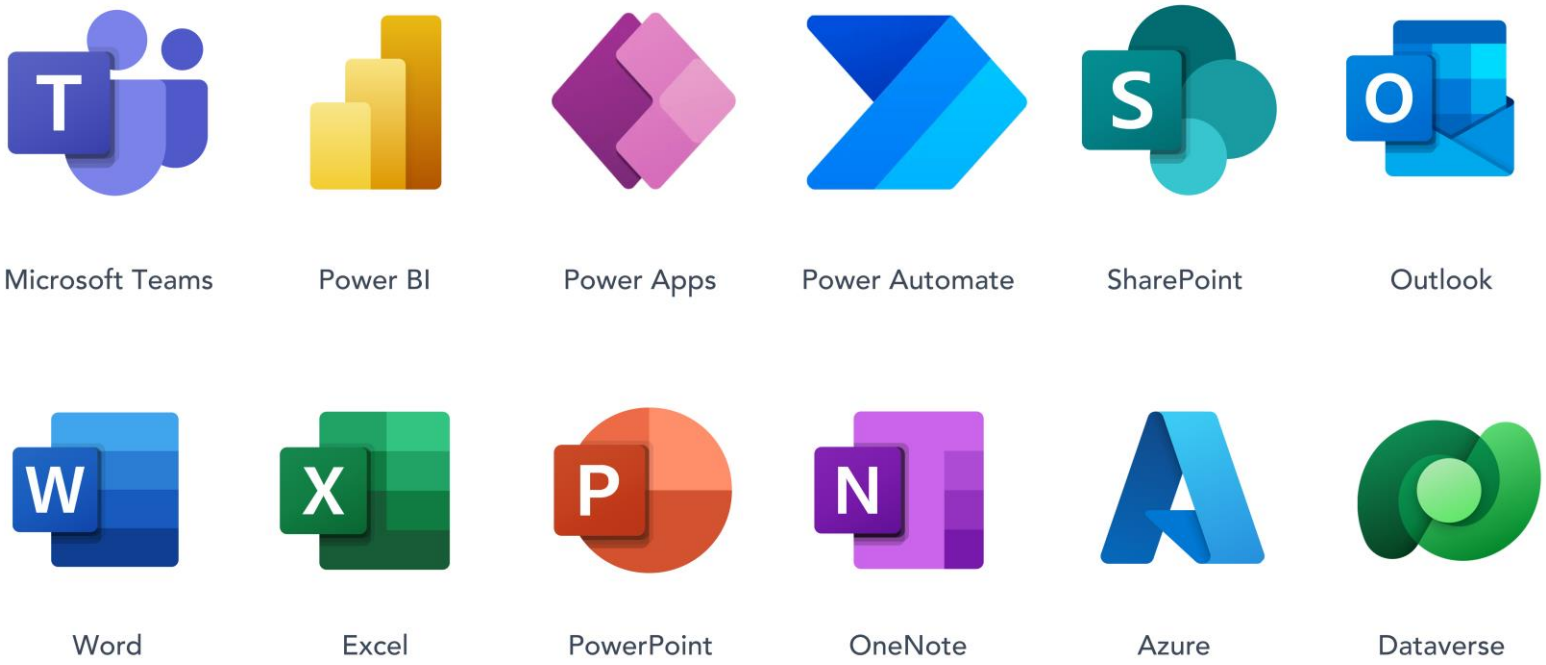
5. Leverage Microsoft 365

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



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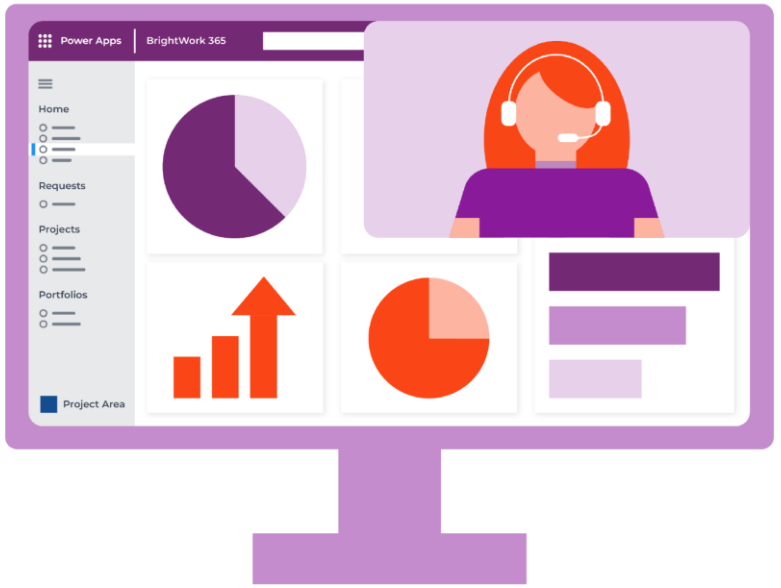
BrightWork 365 Personalized Services

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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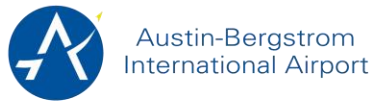
BrightWork 365 Customer Success Stories



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