

# 3D Deployment Process Deep Dive

## Introduction

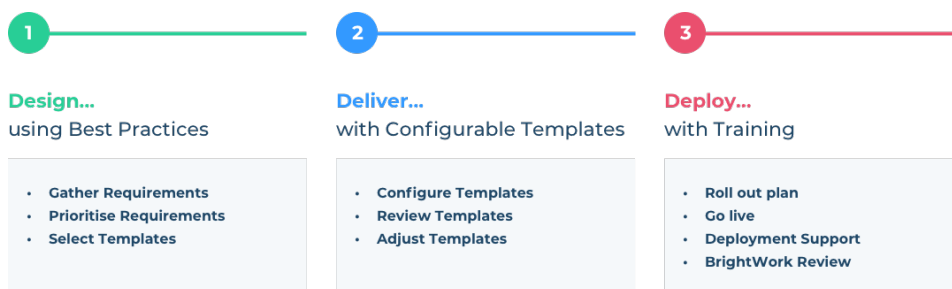
### Introductory Call Agenda

1. Introductions.
2. Review the meeting agenda and objectives.
3. Summarize the needs and the solution proposed.
4. Go over the BrightWork 3D deployment process.
5. Start the Design stage (optional).
6. Introduce the Portfolio Assessment questionnaire.
7. Discuss Next Steps.

---

## BrightWork 3D Deployment Process

The BrightWork deployment process makes it easy for you and your group to get to ... “Project Management Success,” using 3D, a clear transparent change management process.



---

## How Long Does Deployment Typically Take?

An iteration may take between 4 and 12 weeks. Factors that influence duration are:

- Project Management in use today versus what will be implemented.
- Infrastructure readiness.
- Speed of process/management level decisions.
- Resource availability and skill levels.
- External and organizational constraints.

Note: It's typically preferable to take on less rather than more in the first iteration.

---

## Configuration, Customization or Both?

As BrightWork 365 is built on the Microsoft 365 Power Platform, a highly configurable and customizable platform, customers have the option to choose configuration, customization, or both to deliver on project management requirements. For additional information see [Customization](#).

---

## Training Planning

1. During the Design stage we advise reviewing the BrightWork 365 [Getting Started](#) articles.
2. In the Deploy stage we will work with you to plan BrightWork 365 role-based training for Project Managers, Team Members and Senior Executives. We will start with our recommended [Training Syllabus](#) as the foundation for training.
3. If you or your colleagues would like additional training updates, sign up for our Customer Success [Mailing List](#).

---

## Assign Project Team Roles

**Project Manager** (Customer): Drives the overall deployment project for the customer and is from the customer organization. This is the all-important manager and cheerleader role.

**BrightWork Customer Success Partner** (BrightWork): Provide services including advice, product training, design and configuration support and consulting.

**BrightWork Trainer** (BrightWork): Provides training of the configured templates to end users during the Deploy stage.

**System Administrator** (Customer): Responsible for the BrightWork 365 installation and deeper Power Platform technical support on-site.

**BrightWork Designers** (Customer, BrightWork): Responsible for mapping the local project management process to BrightWork 365 templates.

**Senior Stakeholders** (Customer): Departmental or functional managers whose support is necessary for a successful deployment. May run the first set of projects.

**Executive Sponsors** (Customer): Funds, approves and directs the BrightWork 365 implementation in the customer organization.

---

## What's Next?

1. Complete the Portfolio Assessment Questionnaire.
2. Schedule the Requirements Session with your Customer Success Partner.

### Design

## Requirements

### Complete Handover

- During a scheduled handover call you and your assigned BrightWork 365 Solutions Specialist will have a first conversation for introductions and to better understand Requirements and the Expected Solution.

## Understand Vision and Value

### Understand and develop the project management longer term vision

- Work with the senior project management sponsor to capture this vision.
- Review actual customer case studies and examples from other BrightWork 365 customers (with permission) to illustrate what is possible .
- Demo and very lightly train to assist this visioning and requirements discovery process.

### Work with your sponsor, capture the Desired Outcome(s) / Value expected and rank in order of importance

- Examples of Desired Outcome include: Saving Time, Saving Money, Working more efficiently, Cost reduction, Number of projects being run through the system, Visibility, Collaboration, Ease of management, Automation, Management of resources.

### Document Value, etc. in the "Customer Project Management Success document" which will eventually contain:

- Expected Value Analysis
- Evolve Plan
- Current Deployment Plan and Status
- Project Team Member List
- Future Project Management Health Check information

## Document Requirements

- You and BrightWork will work together to capture immediate specific needs using BrightWork requirements gathering documents which will be used by the solution build team.

## Project Management Steps

- Create a BrightWork 365 project to manage the deployment.
- 

## Evolve Plan

### Build Evolve Plan

The Evolve Plan looks at the Vision, Value and the Requirements and decides what is for Iteration 1 delivery and puts the rest on a backlog (unprioritized).

Document the Evolve Plan in the Customer Project Management Success document.

### Protect the Evolve Plan

- Talk through Issues and Risks which could affect this iteration of the Evolve Plan and make adjustments to the plan as necessary.
- Check this iteration of the Evolve Plan against the maturity and appetite of the target group and make adjustments to the plan as necessary.
- Document any issues and risk in the Evolve Plan in the Customer Project Management

Success document.

## Approve the Evolve Plan

- Have the Evolve Plan signed off by the most senior Executive.
- Save the Customer Project Management Success document to a place where it can be accessed, controlled and managed.

## Project Management Steps:

- Develop a task plan / schedule for the current iteration of the Evolve Plan.
- 

# Design

## Select Templates

- Decide which templates will be used in the first iteration.
- Decide the infrastructure to be used for the design/configuration work.

## Decide Template Configurations

- An organization with a lower project management maturity level should strongly consider staying closer to out of the box templates.

## Decide Roles and Security

- Decide what roles are needed and what rights will be associated with each role (e.g. Project Manager, Team Member, Request Approver, Request Submitter, Senior Sponsor, etc.).

## Document the Design Decisions in the Design Documents

## Project Management Steps

- Track and Re-plan the project as necessary.

Deliver

# Configure

## Train for Configuration

- Customers are offered BrightWork 365 Role based and Configuration training.

## Configure Templates

- This "Deliver" phase is intended to help you be empowered and trained - it is a combination of consulting and also delivery of on the job training.

## Implement Roles and Security

- Implement the roles needed with the associated rights with each role (e.g. Project Manager, Team Member, Request Approver, Request Submitter, Senior Sponsor, etc.) so these can be

tested.

## **Project Management Steps**

- Track and Re-plan the project as necessary.

## **Customization Note**

Certain customer requests will necessitate work beyond configuration and therefore customization of the solution will be required. BrightWork will deliver any customizations via an additional managed solution that is specific to the customer (i.e., the 'customer solution'). The customer solution will typically be developed by BrightWork in a customer-dedicated Power Platform environment in a BrightWork tenant and made available to the customer for installation on top of their BrightWork 365 managed solution.

To facilitate reviews, BrightWork will demo the ongoing work to the customer, and will ship incremental releases of the customer solution for installation into an environment in the customer's own tenant.

Upon completion, BrightWork will also make the customer solution available as an unmanaged solution should the customer desire it, to facilitate the customer making future customizations in their own tenant.

Should the customer require BrightWork to develop the customer solution in the customer tenant, the customer will need to apply the necessary licenses to the BrightWork consultants.

---

## **Verify**

### **Identify Stakeholders**

- Seek a representative set of users, e.g. Executive Sponsor and a Project Manager and a Team Member.

### **Verify Design**

- Verify the template design with these key stakeholders in order to review and validate the design work before continuing.
- Be mindful to check that the amount of project management process to be implemented is feasible for the customer's environment.

### **Prioritize Feedback**

- With the key stakeholders, determine items to be adjusted immediately and those that will be added to the Backlog.

## **Project Management Steps**

- Track and Re-plan the project as necessary.
- 

## Adjust

### Adjust Templates

### Configure-Verify-Adjust

- Sometimes (but not always) we may need to cycle through Configure-Verify-Adjust until Project Management Success is likely.

### Final Verification

### Project Management Steps

- Track and Re-plan the project as necessary.

### Deploy

## Train

### Create a Rollout Plan including Training

#### Determine the initial set of projects to manage

#### When designing the training, consider and discuss together:

- Training based on the key roles, e.g. Team Member and Project Manager.
- Training focused on configuring BrightWork 365.
- Extra training as needed to the internal support team (who might be in a project management office or in an IT support team).
- Collaborative Project Management training - can be configured to suit the customer's environment.

### Prepare Training

- Prepare or Configure user guidance / training materials for each of the key roles (Team Member, Project Manager, Senior Manager).
- Grant user access with appropriate permissions for the current set of users.

### Deliver Training

- Offer individual 1:1 follow-up training after the group sessions.

### Project Management Steps

- Track and Re-plan the project as necessary.
- 

## Rollout

## Go Live

- After finishing the BrightWork 365 installation, verify success by completing all [Post Installation Checklist](#) items.

## Feedback

- Conduct a feedback session with the team after some initial usage.

## Adjust

- Determine items to be adjusted immediately and those to be added to the Backlog.

## Project Management Steps

- Track and Re-plan the project as necessary.
- 

## Support

### Handover to Support

- You and BrightWork will confirm all in-scope deliverables have been achieved.
- Review the Support vs Services distinction.
- Handover to the Support Desk.

### Update Project Management Strategy

- Update the strategy in the Customer Project Management Success document.

### Setup ongoing post-deployment status and working sessions, e.g.

- Quarterly Sponsor Start-Evolve review meetings.
- Next Project Management Health Check.

### Post Deployment Check

- Formally close this iteration of the project.
- After 3 months there will be a check-in with your group to validate (or otherwise) the achievement of the Value / Desired Outcomes.

### Project Management Steps

- Close out the Project and conduct a Post-Mortem.
-