

# 3D Deployment Process Deep Dive

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## Introduction

### Introduction Summary Audio

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### Pre-Handover Call Activity

Your BrightWork Representative will schedule your deployment kickoff call and the handover to your [BrightWork Customer Success Partner](#).

Prior to the kickoff call, please ask your Microsoft 365 Administrator to review the [Pre-Install Power Platform Environment Instructions](#), and [BrightWork 365 Install & License Notes](#).

We will then setup a pre-installation call with your Microsoft 365 Administrator and your BrightWork Customer Success Partner to decide on the BrightWork 365 development environment options and coordinate your BrightWork 365 installation that will follow this call.

Your Microsoft 365 Administrator can request access to your BrightWork 365 software here: [Product Download](#).

### Handover Call Agenda

- Introductions
- Review meeting agenda and objectives
- Handover of Initial Understandings of Desired Outcomes and Value Expected
- [Project Management Success Strategy](#)
- [BrightWork 3D Deployment Process](#)
- Installation Coordination
- Deployment Duration
- Configuration, Customization, or Both
- Training Planning
- Assign Deployment Project Team Roles
- What's next?

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### Project Management Success Strategy

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A Project Management Success Strategy is a comprehensive plan and approach designed to enable you to effectively deploy your project and portfolio management processes. It

establishes a framework that allows for the seamless implementation of BrightWork 365 and these processes. The Project Management Success Strategy enables you to start quickly. As you gain experience, the Project Management Success Strategy facilitates the continuous improvement and evolution of project and portfolio management processes. It empowers you to adapt to changing dynamics and drive innovation, ultimately leading to improved project outcomes and organizational success.

### Project Management Success Strategy

1. Expected Value
2. Evolve Plan
3. Current Iteration Deployment Plan and Status
4. Project Team (Customer and BrightWork 365)
5. Latest Project Management Success Check
6. BrightWork 365 Support Status
7. BrightWork 365 Project Management Assistance – A Summary
8. Administration Summary

**BrightWork365** | Expected Value Customer Logo

**Value Expected:**  
"Business Justification" –  
*"Deliver this VALUE by doing this / these"*

**Value Already Delivered:**

- Project and Portfolio Management practices – Initial capabilities in place
- Simplified request process in place and supported by the solution

**Next Steps to Expected Value:**

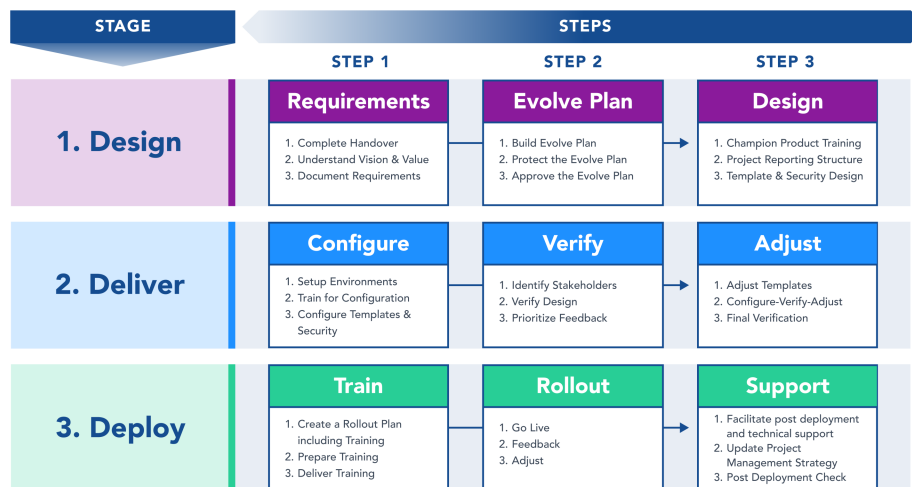
- Review with the key stakeholders
- Design and deliver role-based training sessions
- Check-in on results in 2 months

## BrightWork 3D Deployment Process

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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.

## BrightWork365 | 3D Deployment Process



## Installation Coordination

- IT contact for installation coordination
- Dev environment - In your Microsoft 365 tenant or a BrightWork's Microsoft 365 tenant ...  
[BrightWork 365 Hosted Development Environment Policy & Cost](#)

## Deployment Duration

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Our Start service includes 40 hours of effort spread out over a chosen time period:

- 30 day, 60 day, 90 day preference - see [example plans of each](#)
- Start date preference

The 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

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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](#), and speak with your Customer Success Partner.

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## Training Planning

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1. During the Design stage we advise reviewing the BrightWork 365 [Getting Started](#) series of 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](#).
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## Assign Deployment Project Team Roles

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**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.

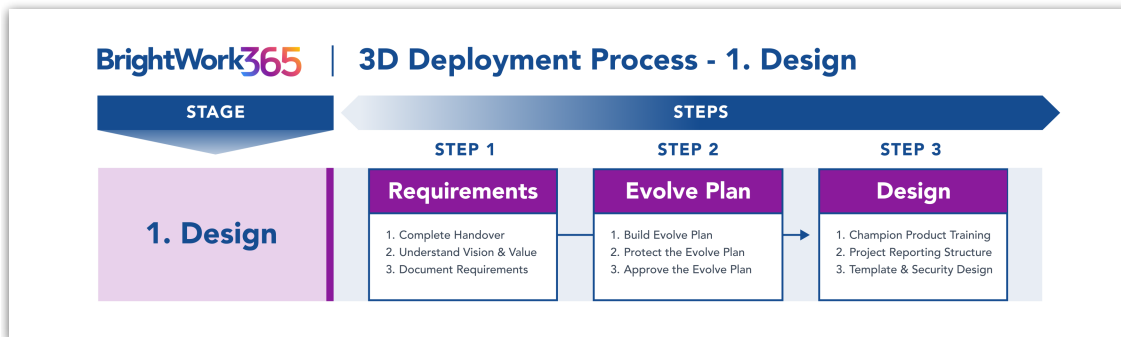
**Executive Sponsors** (Customer): Funds, approves and directs the BrightWork 365 implementation in the customer organization.

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## What's next?

Continue to the **Design stage** and schedule the **Requirements session** with your Customer Success Partner.

## Stage 1 - Design



## Project Management Introduction

BrightWork will collaborate with your team to co-create or revise the Project Management Success Strategy needed to achieve your group's desired business outcomes. We will then work with you to design the first or next iteration of your group's Project and Portfolio Management (leveraging Microsoft 365 and BrightWork 365).

## Step 1 - Requirements

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### Sub-Step 1: 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.

### Sub-Step 2: 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 Project Management Success Strategy document which will eventually contain:**

- Expected Value Analysis
- Evolve Plan
- Current Deployment Plan and Status
- Project Team Member List
- Future Project Management Success Review

## **Sub-Step 3: 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 (data to be added later).
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## **Step 2 - Evolve Plan**

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### **Sub-Step 1: Build Evolve Plan**

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

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

### **Sub-Step 2: 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 Evolve Plan issues and risks in the Project Management Success Strategy document.

### **Sub-Step 3: Approve the Evolve Plan**

- Have the Evolve Plan signed off by the most senior Executive.
- Save the Project Management Success Strategy document in 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 including the **Go-Live date**.

Sample portion of BrightWork 365 Gantt:

Status	Status Reports	Team	Stages	Gantt	My Work	Documents	Actions
Task Name			Duration				
				25	1	8	15
▼ Design			13 days	Design	0%		
▼ Requirements			7 days	Require...	0%		
Complete handover			1 day	Comple...			
Understand the vision			5 days	Understa...	0%		
Capture value statement			1 day	Capture value statement			
▼ Evolve Plan			1 day	Evolve Plan			
Build Evolve Plan			1 day	Build Evolve Plan			
Protect Evolve Plan			1 day	Protect Evolve Plan			
Capture Evolve Plan			1 day	Capture Evolve Plan			
Evolve Plan Complete			0 days	Evolve Plan Complete			
▼ Template Design			5 days	Template Design	0%		

**Tip** It's imperative for subject matter expert team members to confirm the completeness of the task list, the task durations and the completion dates, so as to not jeopardize the deployment's agreed **Go-Live date**.

## Step 3 - Design

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### Sub-Step 1: Product Training for the Champion Team

A hands-on review of all the out of the box functionality in BrightWork 365 so the team can make informed design decisions in the follow-on Design session. See [BrightWork Champion Syllabus](#).

### Sub-Step 2: Project Reporting Structure

- How do you want to structure your Portfolios and Programs?
- Any other Project attributes you need for reporting?

### Sub-Step 3: Template & Security Design

- Decide which templates will be used in this 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.

## Document the Design Decisions

Work with your Customer Success Partner to review and document the Design decisions.

## 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.).

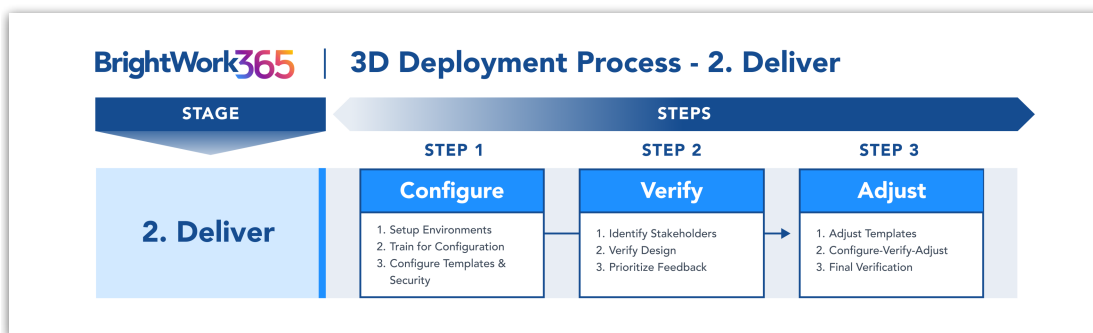
## Project Management Steps

- Track and re-plan the project as necessary.

## What's next?

Continue on to the **Deliver stage**.

### Stage 2 - Deliver



## Project Management Introduction

BrightWork will collaborate with your team using a defined process to configure, customize and verify the prioritized requirements needed to deliver on the first or next iteration of your group's Project and Portfolio Management as called out in your Project Management Success Strategy.

## Step 1 - Configure

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### Sub-Step 1: Setup the Configuration Environments

If not already done as part of the [BrightWork 365 installation process](#), three environments will need to be created in the customer's Microsoft 365 tenant: Dev, Test, and Production.

In order for the BrightWork Customer Success team to collaborate with customers for



solution configuration/customization during the Deliver stage, a guest user account for a named BrightWork person will need to be added to the Dev and UAT environments and given relevant security roles and a Power Apps per User license (preferred), or Power Apps per App license.

For more information see [Add a BrightWork Customer Success Guest User](#) and [Share a canvas app with guest users](#).

## Sub-Step 2: Train for Configuration

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

## Sub-Step 3: Configure Templates & Security

- 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.
- Implement the previously designed BrightWork 365 business unit and portfolio hierarchy structure.

## Project Management Steps

- Track and re-plan the project as necessary.
- Communicate to stakeholders any task date changes that may affect the scheduled **Go-Live date**.

## 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 be developed by BrightWork in the customer's Power Platform environment and made available to the customer for installation on top of their BrightWork 365 managed solution. BrightWork will periodically demo the ongoing work to the customer for collaborative review.

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## Step 2 - Verify

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### Sub-Step 1: Identify Stakeholders

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

## Sub-Step 2: 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.

## Sub-Step 3: 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.
  - Communicate to stakeholders any task date changes that may affect the scheduled **Go-Live date**.
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# Step 3 - Adjust

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## Sub-Step 1: Adjust Templates

## Sub-Step 2: Configure-Verify-Adjust

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

## Sub-Step 3: Final Verification

Conduct a final verification of the Deliver stage activities to ensure all is in order.

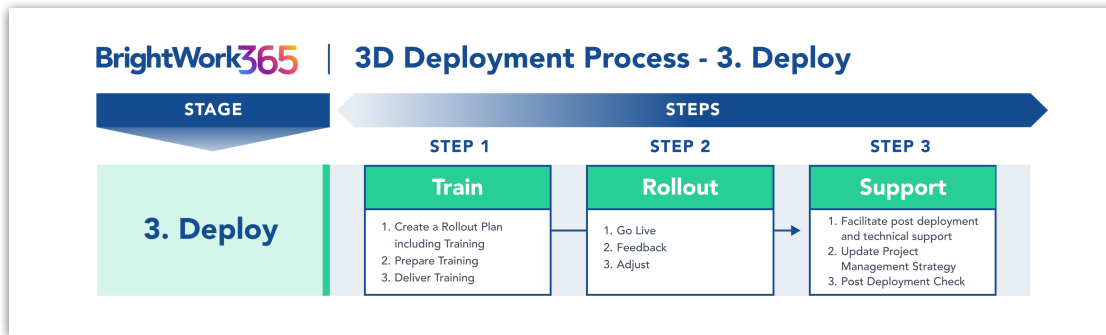
## Project Management Steps

- Track and re-plan the project as necessary.
  - Communicate to stakeholders any task date changes that may affect the scheduled **Go-Live date**.
- 

# What's next?

Continue on to the **Deploy stage**.

## Stage 3 - Deploy



## Project Management Introduction

BrightWork will collaborate with your team to securely deploy the next iteration of your group's Project and Portfolio Management. We will work with you to provide relevant in-context role based training to your internal user base, and we will provide the initial support to ensure the next iteration of your Project Management Success Strategy enables your group to achieve your desired business outcomes.

### Step 1 - Train

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#### Sub-Step 1: 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, i.e., [Champion](#), [Project Manager](#), [Team Member](#), and [Senior Executive](#).
- 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.

#### Sub-Step 2: 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.

#### Sub-Step 3: Deliver Training

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

## Project Management Steps

- Track and re-plan the project as necessary.
  - Communicate to stakeholders any task date changes that may affect the scheduled **Go-Live date**.
- 

## Step 2 - Rollout

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### Sub-Step 1: Go Live

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

### Sub-Step 2: Feedback

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

### Sub-Step 3: 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.
  - Communicate to stakeholders any task date changes that may affect the scheduled **Go-Live date**.
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## Step 3 - Support

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### Sub-Step 1: 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.

### Support Boundaries

#### What does BrightWork Support cover?

- Break / fix problem resolution
  - e.g. error, unexpected behavior, service interrupted, etc.
- Access to information such as the latest release, guides for role based training and configuration, webinar invites and on-demand access to recordings, etc.
  - BrightWork Support does not cover the actual delivery of this training.

**For Support assistance, please submit a ticket or email [support@brightwork.com](mailto:support@brightwork.com).**

### **What are BrightWork or Partner Billable Deployment Services needed for?**

- Infrastructure setup and configuration
- Consulting on design, rollout, etc.
- Configuration of BrightWork 365
  - e.g. setting up new reports, creating new forms, workflows.
- Training

### **Sub-Step 2: Update Project Management Strategy**

- Update your Project Management Success Strategy document.

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

- Quarterly Sponsor Start-Evolve review meetings.
- Your next [Project Management Success Review](#).

### **Sub-Step 3: Post Deployment Check**

- Formally close this iteration of the project.
- Continue to follow up on Deployment Status and address any adjustments that arise.

### **Project Management Steps**

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