

Customer Success Training Syllabus

This role-based training content is used by our BrightWork Customer Success Partners as part of BrightWork 365 [Service Offerings](#). This sample content can be adjusted by the BrightWork Champion along with the Customer Success Partner to ensure proper tracking with the customer's custom solution.

We recommend working through the roles in the order presented, starting with the BrightWork Champion role to setup the necessary app elements for further use by the other roles.

1-BrightWork Champion

Approximately 2 hours

BrightWork 365 Overview

- [What is a BrightWork Champion?](#)
- [What is BrightWork 365?](#)
- [BrightWork 365 Structure](#)
- [Technologies Used](#)
- [Navigating BrightWork 365](#)
- [BrightWork User Management | BrightWork Security Roles Details](#)
- [Frequently Asked Questions](#)

Portfolios & Programs

- [Use Case Discussion](#)
- [Create a Portfolio](#)
- [Create a Program](#)
- [Exercise](#)

Requests

- [Use Case Discussion](#)
- [Create a Project Request](#)
- [How to Create a Project Without a Request](#)
- [Request Approval Stages and Built-in Approval Business Process Flows](#)
- [Exercise](#)

Project Standard Template

- [Template Details](#)
 - [Task Management](#)
 - [Documents](#)
-

- [Status Reporting](#)
- [Project Settings](#)
- [Exercise](#)

New Product Introduction Template

- [Template Details](#) including Differences from Project Standard
- [Exercise](#)

Product Update Template

- [Template Details](#) including Differences from Project Standard
- [Exercise](#)

Work Reports (Issues, Risks, My Work)

- [Use Case Discussion](#)
- [Work Reports](#)
- [Demo](#)
- [Exercise](#)

Interface

- [System & Personal Views & Charts](#)
- [Document Management](#)
- [Microsoft Teams](#)
- [Microsoft Excel](#)
- [Search](#)

Power BI Reports

- [Use Case Discussion](#)
- [Power BI Reports Overview](#)
- [Demo](#)
- [Exercise](#)

Customization

- [Customization Overview](#)
- [Template Configuration](#)
- [Content Template Configuration](#)
- [Power BI Customization](#)

Open Forum Q&A

2-Project Manager

Approximately 2 hours

BrightWork 365 Overview

- [What is BrightWork 365?](#)
- [BrightWork 365 Structure](#)
- [Technologies Used](#)
- [Navigating BrightWork 365](#)
- [Frequently Asked Questions](#)

Requests

- [Use Case Discussion](#)
- [Create a Project Request](#)
- [How to Create a Project Without a Request](#)
- [Request Approval Stages and Built-in Approval Business Process Flows](#)
- [Exercise](#)

Project Standard Template

- [Template Details](#)
- [Task Management](#)
- [Documents](#)
- [Status Reporting](#)
- [Project Settings](#)
- [Exercise](#)

New Product Introduction Template

- [Template Details](#) including Differences from Project Standard
- [Exercise](#)

Product Update Template

- [Template Details](#) including Differences from Project Standard
- [Exercise](#)

Work Reports (Issues, Risks, My Work)

- [Use Case Discussion](#)
- [Work Reports](#)
- [Demo](#)
- [Exercise](#)

Interface

- [System & Personal Views & Charts](#)

- [Document Management](#)
- [Microsoft Teams](#)
- [Microsoft Excel](#)
- [Search](#)

Power BI Reports

- [Use Case Discussion](#)
- [Power BI Reports Overview](#)
- [Demo](#)
- [Exercise](#)

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3-Team Member

Approximately 1 hour

Training Topics

- [Navigating BrightWork 365](#)
- [Find Assigned Work and Update Work Progress](#)
- [Document Management](#)
- [Microsoft Teams](#)
- [Configure a Personal View](#)
- [Exercise](#)

Open Forum Q&A

4-Senior Executive

Approximately 1 hour

BrightWork 365 Overview

- [What is BrightWork 365?](#)
- [BrightWork 365 Structure](#)
- [Technologies Used](#)
- [Navigating BrightWork 365](#)
- [Frequently Asked Questions](#)

Requests

- [Use Case Discussion](#)
- [Create a Project Request](#)
- [Request Approval Stages and Built-in Approval Business Process Flows](#)

- [Exercise](#)

Interface

- [System & Personal Views & Charts](#)
- [Document Management](#)
- [Microsoft Teams](#)
- [Microsoft Excel](#)
- [Search](#)

Power BI Reports

- [Use Case Discussion](#)
- [Power BI Reports Overview](#)
- [Demo](#)
- [Exercise](#)

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