BrightWork Champion

Who Is This Guide For?

This guide is geared to the customer organization's BrightWork Champion, the person responsible for the initial in-app setup of BrightWork 365, including the Program and Portfolio structure, prior to starting the management of projects within the app. The Champion gains a thorough understanding of BrightWork 365 top to bottom, helps define their organization's requirements, and acts as an invaluable subject matter resource for their peers.

Prerequisites

We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- BrightWork User Management | BrightWork Security Roles Details

---

Importance of a Customer-Appointed BrightWork Champion

A customer-appointed BrightWork Champion is an internal contact within the customer organization who helps coordinate learning, adoption, and communication. This is not a BrightWork internal role; it is a customer-side role that supports engagement across the relevant teams and provides a clear point of contact for training-related progress and questions.

The Champion can support by:

- Coordinate the internal rollout of learning.
- Help identify learners by role or group.
- Communicate agreed learning timelines.
- Raise blockers or questions with the Customer Success Partner.
- Encourage consistent participation and reinforce the value of learning.

The Customer Success Partner can support the Champion by sharing the agreed learning plan, aligning learning with deployment milestones, providing communication guidance, and reviewing progress at agreed checkpoints.

Create the Portfolio and Program structure

In order to submit project requests and manage projects in BrightWork 365, you'll first need to create at least one parent Portfolio and one child Program associated with the Portfolio. Once this initial structure is in place you can move on to setting up your first project.

Create a Portfolio

Click the **Portfolios** link, click **+ New** and fill out the form fields.

Create a Program

Click the **Programs** link, click **+ New** and fill out the form fields.

Deeper Dive - Portfolios & Programs

- Portfolios
- Programs

Portfolio Security and Access

Assign security roles to your BrightWork 365 users.

Design and implement your organization's security and access model.

What's Next?

We suggest you next move on to subsequent role-based guides, beginning with the Project Manager guide.
