

Customer Success Training Syllabus

Introduction

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.

Please confirm attendees have all relevant Security Roles and Licenses to successfully access their BrightWork 365 environment prior to the first session.

1-BrightWork Champion

Approximately 2 hours

BrightWork Champion Introduction

- What is a BrightWork Champion?
- [What is a BrightWork Customer Success Partner?](#)
- [What is BrightWork 365?](#)
- [Technologies Used](#)
- [Navigating BrightWork 365](#)
- [Projects Area Components](#)
- [BrightWork User Management](#)
- [BrightWork Security Roles Details](#)
- [Frequently Asked Questions](#) (see bottom of page)
- See [suggested exercises](#) - decide with your assigned trainer if done during or after the live session

Portfolios & Programs

- [Portfolios Overview](#)
- [Create a Portfolio](#)
- [Create a Program](#)
- See [suggested exercises](#) - decide with your assigned trainer if done during or after the live session

Requests

- [Request Process Overview](#)
- [Create a Project Without a Request](#)
- See [suggested exercises](#) - decide with your assigned trainer if done during or after the live session

Projects

- [Projects Overview](#)
- [Schedule Settings](#)
- [Task Management](#)
- [Project Stage Approval Process](#)
- [Risks & Issues](#)
- [Actions](#)
- [Costs](#)
- [Communications](#)
- [Document Management](#)
- [Status Reporting](#)
- See [suggested exercises](#) - decide with your assigned trainer if done during or after the live session

Work Allocation Reports (My Work, Tasks, Issues, etc.)

- [Work Allocation Reports Overview](#)
- [Resource Utilization Overview](#)
- Suggested exercises - decide with your assigned trainer if done during or after the live session:
 - Find the work assigned to you within the project and also from the main nav.
 - Change the status of the work assigned to you.

Interface

- [System & Personal Views & Charts](#)
- [Document Management](#)
- [Microsoft Teams](#)
- [Microsoft Excel](#)
- [Search](#)
- See [suggested exercises](#) - decide with your assigned trainer if done during or after the live session

Power BI Dashboards

- [Power BI Dashboards Overview](#)
- Suggested exercise (if you have Power BI access) - decide with your assigned trainer if done during or after the live session:
 - Find the work assigned to you in all relevant Power BI Dashboards.

Customization

- [Customization Overview](#)
 - [Request Template & Project Template Configuration](#)
 - [Form Configurator](#)
 - [Content Templates](#)
 - [Power BI Customization](#)
 - See [suggested exercises](#) - decide with your assigned trainer if done during or after the live session
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Open Forum Q&A and Training Feedback

2-Project Manager

Approximately 2 hours

Project Manager Introduction

- [What is BrightWork 365?](#)
- [Technologies Used](#)
- [Navigating BrightWork 365](#)
- [Projects Area Components](#)
- [Frequently Asked Questions](#) (see bottom of page)
- See [suggested exercises](#) - decide with your assigned trainer if done during or after the live session

Requests

- [Request Process Overview](#)
- [Create a Project Without a Request](#)
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Projects

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Open Forum Q&A and Training Feedback

3-Team Member

Approximately 1 hour

Team Member Training Topics

- [What is BrightWork 365?](#)
- [Navigating BrightWork 365](#)
- [Projects Area Components](#)
- [Find Assigned Work and Update Progress](#)
- [Document Management](#)
- [Microsoft Teams](#)
- [Configure a Personal View](#)
- Suggested exercises - decide with your assigned trainer if done during or after the live session:
 - Find the work assigned to you within the project and from the main nav.
 - Change the status of the work assigned to you.

Open Forum Q&A and Training Feedback

4-Senior Executive

Approximately 1 hour

Senior Executive Introduction

- [What is BrightWork 365?](#)
- [Technologies Used](#)
- [Navigating BrightWork 365](#)
- [Projects Area Components](#)
- [Frequently Asked Questions](#) (see bottom of page)
- See [suggested exercises](#) - decide with your assigned trainer if done during or after the live session

Requests

- [Request Process Overview](#)
- [Create a Project Without a Request](#)
- See [suggested exercises](#) - decide with your assigned trainer if done during or after the live session

Interface

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