

BrightWork 365 Training Guide

Guide to BrightWork Learn and Customer Success Partner-led Training

Tip KEY TAKEAWAYS

- BrightWork Learn builds consistent foundational knowledge at each learner's own pace.
- Customer Success Partner-led training helps teams apply that knowledge to their organization, processes, governance, and goals.
- Used together, they provide a flexible and practical path to adoption and long-term value.

Purpose

This guide explains the BrightWork 365 learning and training options available to support successful adoption, effective project delivery, and long-term business value.

What is BrightWork Learn?

BrightWork Learn (learn.brightwork.com) is our BrightWork online learning academy. It helps customers build the knowledge and confidence needed to use BrightWork 365 effectively.

Learners can progress at their own pace through structured learning paths and role-relevant courses. Content includes interactive lessons, hands-on simulations, recorded videos, and supporting reading materials.

What are the benefits of BrightWork Learn?

BrightWork Learn provides a consistent, scalable foundation for customer learning. It can help organizations:

- Support faster onboarding and a quicker path to value for new users.
- Build consistent BrightWork 365 knowledge across roles, teams, and departments.
- Help learners prepare for more productive design, configuration, and live training sessions.
- Enable continuous learning as new colleagues join, responsibilities change, or refresher training is needed.

What is Customer Success Partner-led training?

Customer Success Partner-led training is a series of live, interactive sessions led by a BrightWork subject matter expert. Sessions are typically delivered virtually through

Microsoft Teams and are designed to help customers apply BrightWork 365 knowledge to their own business context.

Depending on the agreed training plan, live sessions may include group training, workshops, coaching, or webinars. They are most valuable when foundational learning has already been completed and the session can focus on:

- Real-time questions, discussion, and clarification.
- Practical application using relevant customer scenarios.
- Immediate feedback and guidance.
- A flexible pace based on learner needs and agreed session objectives.
- Customer-specific governance, reporting, workflows, adoption considerations, and agreed next steps.

What does BrightWork Learn cover?

BrightWork Learn focuses on standard BrightWork 365 learning topics that help customers build core product knowledge and prepare for practical application.

- BrightWork 365 product fundamentals and standard ways of working.
- Role-based learning for key user groups, such as Champions, Administrators, Project Managers, Team Members, and Senior Executives.
- Introductory guidance on governance, security, reporting, and adoption-related topics.

Customer-specific process design, configuration decisions, advanced reporting, and adoption planning are best addressed through Customer Success Partner-led workshops or advisory sessions.

How do BrightWork Learn and live training work together?

BrightWork Learn builds foundational knowledge through self-paced learning. Customer Success Partner-led training then helps customers apply that knowledge to their own processes, governance, reporting, workflows, and implementation goals.

How do Customer Success Partners support training success?

Customer Success Partners act as facilitators and trusted advisors. They help customers connect learning to implementation and adoption objectives by:

- Agreeing an appropriate learning and training plan.
- Helping translate learning into clear outcomes and next steps.
- Using live sessions to address practical questions and customer scenarios.
- Identifying additional learning needs and recommending suitable next steps.
- Working with the customer Champion to support progress and resolve blockers.

When should learners use BrightWork Learn?

Relevant BrightWork Learn courses can be completed at several points in the customer journey:

- Before design or configuration workshops.
- Before role-specific live training.
- Before go-live.
- When taking on a new role or responsibility.
- When onboarding new team members.
- As refresher or continuous learning after implementation.

How is the hybrid approach used during a BrightWork deployment?

The learning approach can be aligned with the [BrightWork 3D deployment process](#). Specific courses, sequencing, timelines, and live sessions are agreed with the Customer Success Partner based on the customer's scope and needs.

The following suggested learning milestones can help teams prepare for key activities:

Suggested milestone	Recommended learning focus	Purpose
Before a design workshop	Relevant Champion or Administrator learning.	Build foundational knowledge for informed design discussions.
Before configuration activities	Relevant Project Manager learning.	Prepare key users to understand and apply configuration decisions.
Before a governance or security review	Relevant governance and security learning.	Prepare stakeholders for decision-making and review.
Before go-live	Relevant Team Member and Senior Executive learning.	Support role readiness and adoption.

Where appropriate, courses may be assigned by role, with target completion dates linked to upcoming workshops or deployment milestones. Completing relevant learning in advance enables live sessions to focus on real scenarios, the customer environment, and practical application.

Why is a customer-appointed BrightWork Champion important?

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.

Can BrightWork Learn be used after go-live?

Yes. BrightWork Learn is intended to support continuous learning throughout the BrightWork journey. Customers can use it to onboard new team members, refresh knowledge, support role changes, and explore additional BrightWork 365 capabilities as their needs evolve.

How should customers get started?

Customers should work with their BrightWork Customer Success Partner and customer-appointed BrightWork Champion to agree on the right learning approach for their organization. This includes identifying learner groups, recommended BrightWork Learn courses, target completion timelines, and any live training or workshop needs aligned to deployment milestones and business outcomes.
