

6 Project Management Success Stories

Learn how leading organizations have leveraged SharePoint 2013 for project management success!

BrightWork

Introduction

Several BrightWork customers have been generous enough to share their success stories about using SharePoint to manage projects.

This ebook summarizes the project management challenges these companies faced and the solution BrightWork provided which aided their success.

These stories explore the entire spectrum of project management, from simple task management to full program management.

Each individual case study reveals how BrightWork templates and reporting tools helped customers leverage SharePoint 2013 to collaboratively and efficiently manage projects and portfolios.



MUTI instantly get their projects under control with a SharePoint solution that could evolve with their success

Problem

MUTI manages a shelter recycling/deployment program for major telecommunications providers in the United States, where they take decommissioned concrete shelters and bring them to a central location for refurbishment and redeployment.

The entire program had been managed using a very light, ad hoc process consisting primarily of email and various Excel spreadsheets. As they added more and more shelters to the program, MUTI knew they had to move toward a project management solution to evolve with their success, which their previous process would have made difficult.

Solution

MUTI chose BrightWork as their project management solution. They started out using the Projects Tracker template to get things up and running quickly, managing the macro items associated with each project. After approximately one month of use, their system evolved considerably and MUTI easily migrated to the BrightWork Project Structured template leveraging the two-way Microsoft Project sync and began managing all projects at the (micro) task level.

✓	?	□	Health	Time	Cost	Quality	Project ID	Project Manager	% Complete	Required Date	Start Date
!	!	!	✓	✗	!	✓	Small Systems Projects	...	75 %	12/21/2014	10/6/2014
!	!	!	✓	✓	✓	✓	Upgrade Hardware for Finance Dept.	...	0 %	12/21/2014	
			✗	✓	✓	✓	Install new OS	...	50 %	12/22/2014	10/7/2014
			!	✓	✗	✗	Install new wireless network for IT	...	30 %	12/23/2014	10/8/2014
!	!	!	✓	!	✓	✗	Training for Finance Dept.	...	0 %	12/24/2014	
!	!	!	✗	✓	✓	✓	Setup SharePoint Server Farm	...	10 %	12/25/2014	10/9/2014
			✓	✓	!	✓	Hardware Inventory	...	54 %	12/26/2014	10/6/2014

The Projects Tracker enables the project manager to track just the high-level details of certain projects, without having to create a full site for these projects.

The process to refurbish one shelter consists of approximately 40 tasks, all grouped under various milestones (i.e., get the shelter, move the shelter, triage, take inventory, etc.). Every project consists of standard work which has to be done, with additional work added on a case-by-case basis. Using the Project Structured template, MUTI can schedule activities milestones in Microsoft Project and report on project status to key stakeholders by rolling up the data in BrightWork using the sync between Microsoft Project and SharePoint.

The screenshot displays the BrightWork project dashboard for 'Hardware Upgrade Global (PStr)'. The interface includes a navigation sidebar on the left with categories like 'Project Home', 'Project Help', 'Initiate', 'Plan', 'Execute', and 'Control'. The main content area features a 'Get started with your project' section with five numbered steps: 1. Setup Project, 2. Add Goals, 3. Add Tasks, 4. Add Documents, and 5. Add Risks. Below this is a 'Timeline' section showing a Gantt chart for the project duration from March 2014 to July 2014, with phases for Project Initiation, Project Planning, and Project Implementation. Other sections include 'Top Open Issues' with a table of issues, 'Overdue Items' with a table of overdue tasks, 'Project Goals' with a progress bar, and 'Project Announcements'.

The enhanced Microsoft Project syncing included with this template facilitates the syncing of extra auto-calculated information into SharePoint such as baseline information; costs; and planned work and duration.

About MUTI

Midwest Underground Technology, Inc. (MUTI) provides infrastructure construction services to the telecommunications industry.





Ritchey Design perform advanced task management using a combination of the Discussion App and BrightWork reporting in SharePoint 2013

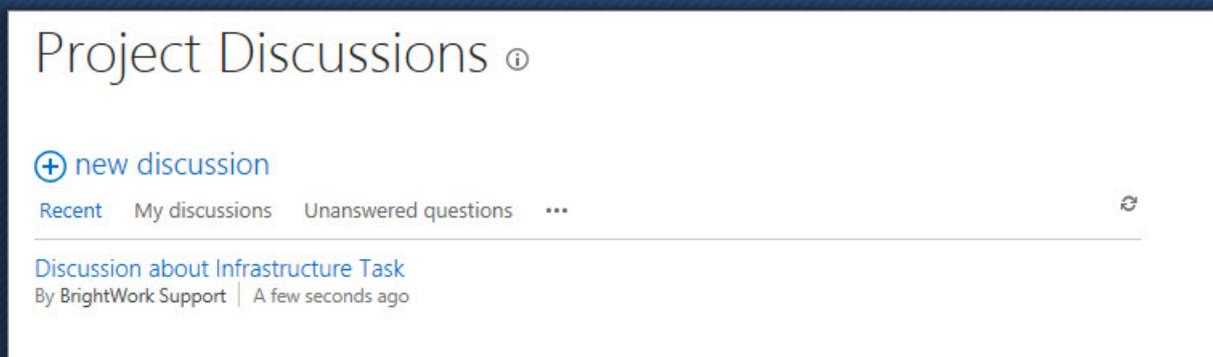
Problem

Ritchey Design needed a project management solution to manage new product development. The company is well-known for its technical merits through attention to detail during the product design phase, combined with rigorous fatigue testing, resulting in high-quality, road and mountain bike components.

To manage this meticulous process, Ritchey Design needed a collaborative platform to closely track and control details of their projects, especially down to the task level. They needed to measure the ownership, deadlines and responsiveness of both project tasks and the discussions around these tasks.

Solution

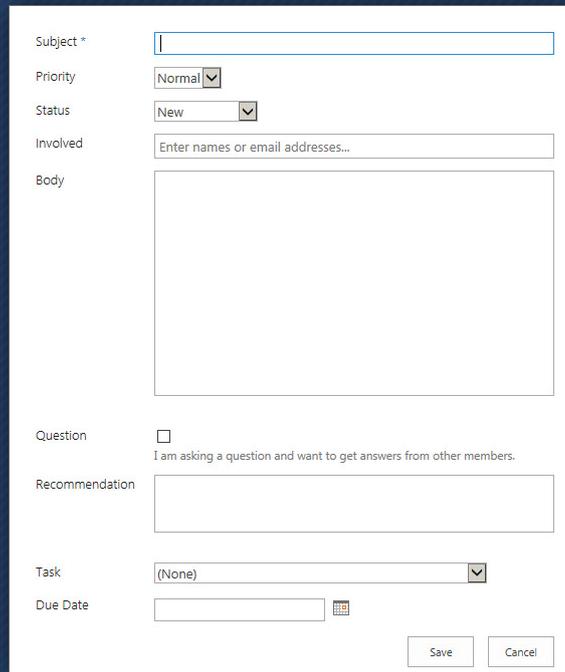
Ritchey Design had an idea to include advanced collaboration of tasks by linking project tasks to discussion forums in SharePoint 2013. The redesigned Discussion App in SharePoint 2013 has been significantly improved, making it the perfect component to collaborate on project tasks in such detail.



The new Discussion App in SharePoint 2013

The need for close management of projects, project tasks and discussions was fulfilled with the Discussion App and the BrightWork Reporting Engine. The first step was to design the Discussion App as a "work item," so the discussion could be processed as a project task. Simultaneously, they used custom views to track the status of project tasks, as well as the discussions linked to those tasks. Custom dashboards were built to report on discussions across multiple projects.

With this new approach to task management, Ritchey Design has increased the overall visibility of their projects, and as a result has improved their time to market.



The image shows a screenshot of a task management form. The form includes the following fields and controls:

- Subject ***: A text input field.
- Priority**: A dropdown menu with "Normal" selected.
- Status**: A dropdown menu with "New" selected.
- Involved**: A text input field with the placeholder text "Enter names or email addresses...".
- Body**: A large text area for the task description.
- Question**: A checkbox that is currently unchecked, with the text "I am asking a question and want to get answers from other members." below it.
- Recommendation**: A text input field.
- Task**: A dropdown menu with "(None)" selected.
- Due Date**: A date input field with a calendar icon to its right.
- Buttons**: "Save" and "Cancel" buttons at the bottom right.

The discussion app was configured as a "work item," so it could be processed in the BrightWork Reporting Engine the same way as a project task.

About Ritchey Design

Ritchey Design is recognized around the world as one of the cycling industry's premier innovators of high-quality bicycle components.





Sonic Healthcare USA gain visibility into project statuses by implementing a streamlined project management solution in SharePoint 2013

Problem

While Sonic Healthcare had a defined project management process, they did not have a consistent tool for the entire project team. Using email and spreadsheets to manage their project activities made it difficult to keep track of all the individuals and tasks they were assigned. Also, rapid reporting on project statuses was not possible with this approach. The project management office wanted to move away from this approach and implement a more streamlined process in SharePoint.

Solution

Sonic follows a specific 10 task process for interface projects. The process is always the same, so they took an out-of-the-box BrightWork template and configured it to match their local process. Now with BrightWork, when a project is initiated, the process is already laid out in the SharePoint site. Project managers can easily assign the tasks to resources who continuously update tasks and add thorough notes as the project progresses.

The screenshot shows a SharePoint list titled "Project Status Reports". It includes a "new item" button and a "Current Report" filter. The table below displays project data with columns for Health, Time, Week Ending, Current Phase, Current Finish Date, % Complete, Status Report Comments, Major Accomplishments, and Major Activities Planned.

Health	Time	Week Ending	Current Phase	Current Finish Date	% Complete	Status Report Comments	Major Accomplishments	Major Activities Planned
🟡	🟢	4/7/2014	Execute & Control	6/27/2014	40 %	Project running late due to unavailability of Hyper-V expert.	Installed OS for Hyper-V	Test Hyper-V
🔴	🟢	3/29/2014	Plan	6/27/2014	20 %	Project running late due to unavailability of Hyper-V expert.	Got hardware delivered and installed.	Install OS for Hyper-V.

BrightWork includes a capability that enables you to capture a snapshot of the current project status and maintain a historical record of the progress of the project.

Visibility is one of the greatest benefits Sonic Healthcare has experienced from the BrightWork solution. Since all project team members update their work in the BrightWork site, it is incredibly easy get a snapshot into the status of all project activity. This transparency allows project managers to give quick, real time updates to project stakeholders, rather than having to call individual team

members or manually sort through project data to give progress reports. Now all project information is updated and housed right in SharePoint.

About Sonic Healthcare USA

Sonic Healthcare USA is one of the world's largest medical diagnostics companies, providing laboratory and radiology services to medical practitioners, hospitals, community health services, and their collective patients.





Schneider Electric centralize and evolve project management best practices using BrightWork on SharePoint 2013

Problem

The business unit at Schneider Electric had previously deployed an Excel-based project management template to assist project managers in managing customer facing projects. Updates, changes, corrections and ongoing improvements were very difficult to distribute and manage across their 35+ project management staff. In addition, the challenges with different versions of Excel, macro security, etc. created excessive support time.

Solution

Schneider Electric are currently using the BrightWork Project Structured template within project offices to align with the staffing and management structure. In addition, they are leveraging portfolios to analyse and manage a handful of portfolios.

Some of Schneider Electric's benefits from the BrightWork solution include:

- Improved project visibility and collaboration in an IT structure that can easily manage and customize with internal resources.
- As project managers update their project management plan all the necessary reporting, metrics and related data are available immediately to project resources and management to ensure projects stay on track.
- Reduced burden on email for communications and improved the consumption of data by different types of roles – engineering, management and field commissioning resources.

In addition, they have customized the solution leveraging their customer project process (CPP). This is Schneider Electric's project management methodology based on company recognized best practices, and have fully leveraged six project metrics that support their methodology.

BrightWork Home BrightWork Help Templates Area Training Area Sample Area Projects Area Portfolio Reporting Manage User Accounts

Project Metrics

Project Home

Project Help

Initiate

Project Statement

Goals

Contacts

Plan

Tasks Update

Task Reports

Documents

Risks

Resource Reports

Execute

My Work Reports

Work Reports

Discussions

Control

Issues Update

Issue Reports

Metrics

Status Reporting

Site Contents

+ new item

Active Items All Items Manual Metrics ...

Indicator Icon	Title	Metric Id	Description
	% Complete	PercentComplete	Percent complete for the Project. This Calculated Number Metric returns the % Complete value from the Project Status Report list, Current Report view. If active, this Metric is used in the % Complete column of the All Project Summaries report.
🟡	Health	Health	Overall Project Health. This Calculated Number Metric uses the sum of the Indicator Status Codes in the Project Metrics list for Active metrics to determine the overall project health. Warning icons have a value of 1 and metrics showing Danger icons have a value of 2. The more Warning or Danger values the higher the score. The value returned is compared to a fixed number to determine the indicator icon.
🔴	Late Issues	Issues	Number of Issues with a Red Status Indicator. This Calculated Number Metric returns the number of items returned by the Template Issues - Red Issues report. The value returned is compared to a fixed number to determine the indicator icon. If active, this Metric is used in the Issues column of the All Project Summaries report.

BrightWork includes a capability that enables you to capture a snapshot of the current project status and maintain a historical record of the progress of the project.

As their business needs change, new reports and changes to their project templates can be internally developed instantaneously. With that, the project management office consistently leverages the Design Sync feature which allows them to synchronize those improvements to existing projects in a controlled manner.

About Schneider Electric

Global specialist in energy management, Schneider Electric makes energy safe, reliable, efficient, productive and green. How? Simply by making energy visible and giving you the means to act to optimize its consumption.



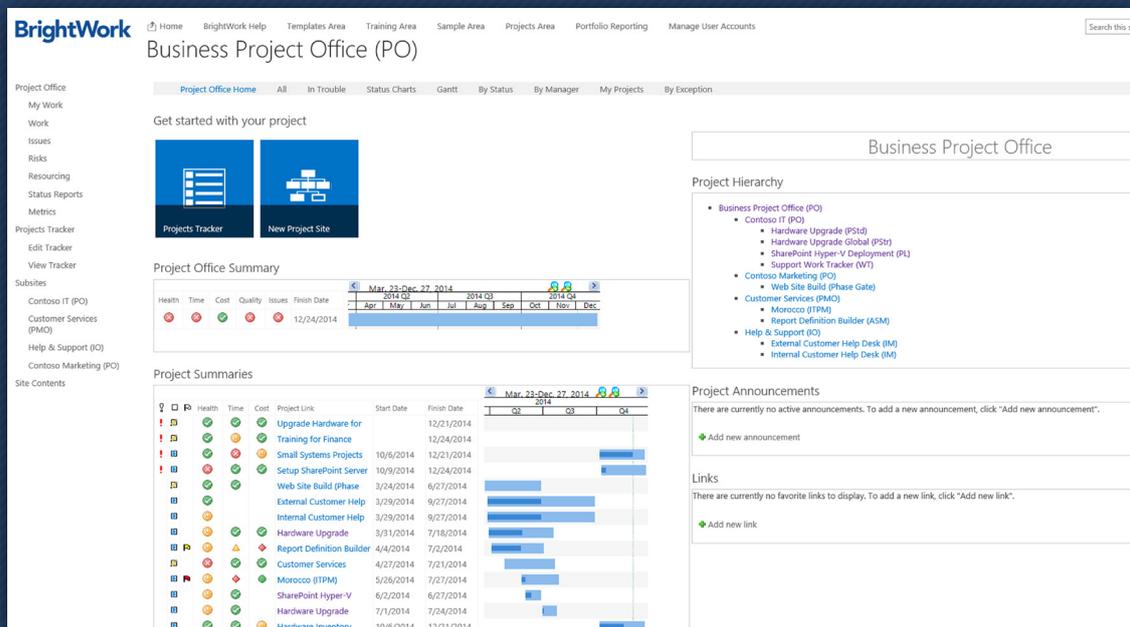
LIDS replace numerous project spreadsheets with SharePoint reporting to manage complex hierarchy in SharePoint 2013

Problem

Due to rapid growth, LIDS were required to set up a project management office to regulate the increasing number of projects which they needed to manage. They could have over 100 projects on the go at any given time, with that number set to increase. With no formal project management process or tools in place, LIDS wanted to implement a SharePoint solution to leverage their project management practices.

Solution

With BrightWork, LIDS set up a project office in SharePoint divided into five departments within the organization. Each department had many subcategories based on the different functions of that department. Some of those functions had their own sub-sites, creating a rather complex hierarchy, which was otherwise difficult to manage using numerous different spreadsheets.



BrightWork Business Project Office (PO)

Project Office Home | All | In Trouble | Status Charts | Gantt | By Status | By Manager | My Projects | By Exception

Get started with your project

Projects Tracker | New Project Site

Project Office Summary

Health	Time	Cost	Quality	Issues	Finish Date
🔴	🟡	🟢	🟢	🔴	12/24/2014

Project Summaries

Health	Time	Cost	Project Link	Start Date	Finish Date
🔴	🟢	🟢	Upgrade Hardware for	12/21/2014	12/21/2014
🔴	🟢	🟢	Training for Finance	12/24/2014	12/24/2014
🔴	🟢	🟢	Small Systems Projects	10/6/2014	12/21/2014
🔴	🟢	🟢	Setup SharePoint Server	10/9/2014	12/24/2014
🔴	🟢	🟢	Web Site Build (Phase	3/24/2014	6/27/2014
🔴	🟢	🟢	External Customer Help	3/29/2014	6/27/2014
🔴	🟢	🟢	Internal Customer Help	3/29/2014	6/27/2014
🔴	🟢	🟢	Hardware Upgrade	3/31/2014	7/18/2014
🔴	🟢	🟢	Report Definition Builder	4/2/2014	7/2/2014
🔴	🟢	🟢	Customer Services	4/27/2014	7/21/2014
🔴	🟢	🟢	Morocco (IFPM)	5/26/2014	7/27/2014
🔴	🟢	🟢	SharePoint Hyper-V	6/2/2014	6/27/2014
🔴	🟢	🟢	Hardware Upgrade	7/1/2014	7/24/2014
🔴	🟢	🟢	Hardware Inventory	10/6/2014	12/21/2014

Project Hierarchy

- Business Project Office (PO)
 - Contoso IT (PO)
 - Hardware Upgrade (P5st)
 - Hardware Upgrade (Global) (P5st)
 - SharePoint Hyper-V Deployment (PL)
 - Support Work Tracker (WT)
 - Contoso Marketing (PO)
 - Web Site Build (Phase Gate)
 - Customer Services (PMO)
 - Morocco (IFPM)
 - Report Definition Builder (ASM)
 - Help & Support (O)
 - External Customer Help Desk (IM)
 - Internal Customer Help Desk (IM)

Project Announcements

There are currently no active announcements. To add a new announcement, click "Add new announcement".

Links

There are currently no favorite links to display. To add a new link, click "Add new link".

The Project Office template is the most popular cross-project template available with BrightWork. It includes multiple collections of reporting dashboards (Projects, My Work, Work, Issues and Resourcing) that aggregate and roll up data from all the projects located under it in the hierarchy.

With the deployment of BrightWork on SharePoint 2013, LIDS has experienced a closer collaboration among project teams and across departments. Using the BrightWork reporting dashboards in SharePoint, executives are now able to access meaningful reports in an easy and timely manner. Possibly the biggest benefit of the solution is the decommissioning of the project spreadsheets with streamlined reporting in the SharePoint environment.

BrightWork has been well adopted and well received by users who are happy to retire the abundance of spreadsheets. Executives are also thrilled to see hundreds of projects get under control and reported on effectively.

About LIDS

The LIDS Sports Group, operating within Hat World, Inc., is comprised of the LIDS retail headwear stores, the LIDS Locker Room specialty fan retail chain, the LIDS Clubhouse retail stores, the LIDS Team Sports wholesale team sports business and the Internet businesses.



Exide Technologies deploy a global tool on SharePoint 2013 to standardize project management across their organization

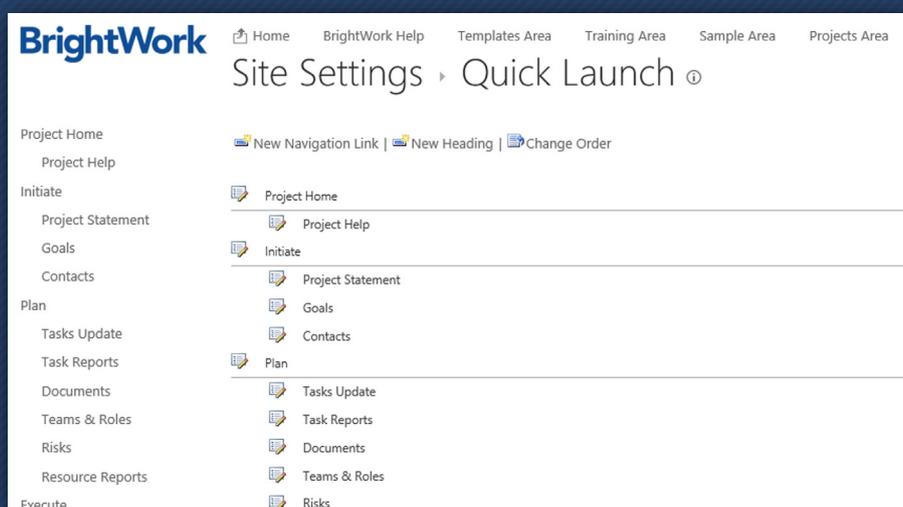
Problem

Exide Technologies hosted all of their departments' information on different servers. Using shared files for cross functional teams required significant efforts, emailing back and forth versions of project documents, and the stress and frustration that goes along with that obstacle. Additionally, they were developing their core project management competency through aggressive training programs, but were lacking in the use of a single consistent tool for project management.

Being a manufacturing company, employees who work in cross functional teams have varying degrees of competency and experience with different computer programs. As a result, people at different locations are actually working with different software versions, making traditional project management solutions even more difficult. Implementing a new product development process, Exide Technologies sought a solution which could be used across their global organization.

Solution

Exide Technologies adopted the out-of-the-box BrightWork solution and adjusted the language and structure to match the project management methodology they had been indoctrinating into their organization.



All BrightWork Templates are fully configurable to enable you to fine tune everything to suit your local processes and practices.

To do so, they customized the BrightWork templates to match their own project management style and language. Simultaneously, Exide was implementing a new product development stage gate process, building workflows for the process, which resulted in the creation of BrightWork project sites as the project passed critical progress gates. They have now implemented the BrightWork tool across the globe, and are taking it through progressive improvement steps in their Americas region, where on-time, on-budget project management is critical. The greatest success with BrightWork is, for the first time in the history of the company, the executive leadership team has access to the entire project portfolio by region and can now understand how they are performing on their project commitments.

About Exide Technologies

Exide Technologies serves the complex stored energy needs of customers around the world, providing services and systems that enhance vehicle performance and fleet utilization as well as those that reduce risk of temporary interruptions of power supplies.

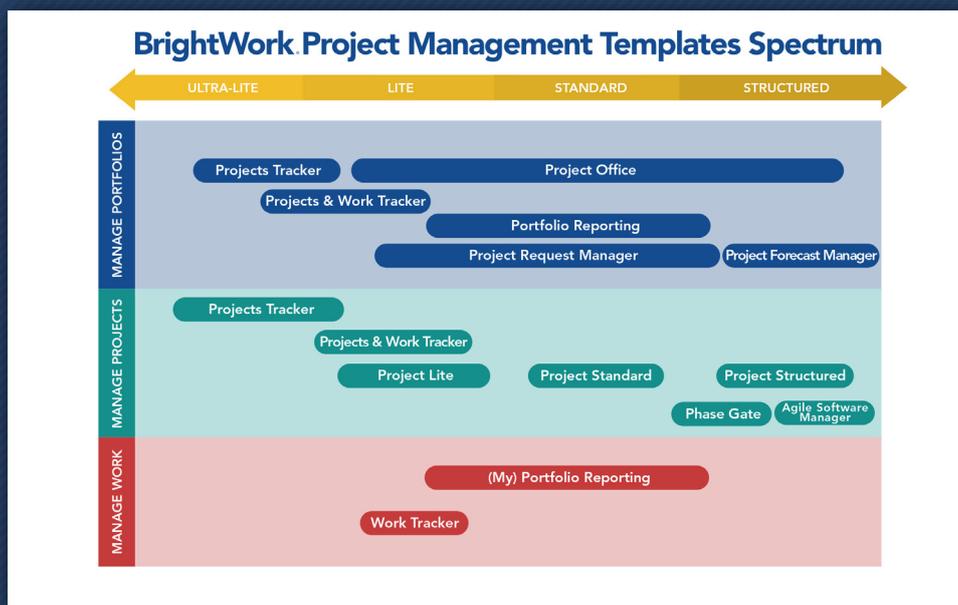


Summary

BrightWork is a best in class SharePoint solution for the management of projects, portfolios and work that is fast and inexpensive to deploy and simple to configure and evolve.

BrightWork enables any organization to instantly deploy an affordable amount of project, portfolio and everyday work management, delivering immediate visibility and control.

The unique best-practices templates approach, pioneered by BrightWork, allows organizations to start quickly and to gradually evolve by adding more templates and dashboards as needed and as ready.



Try BrightWork for Yourself!

See firsthand how your organization can improve your project management success rate using BrightWork on SharePoint. Start a free 30 day trial of BrightWork today.

[START FREE TRIAL](#)