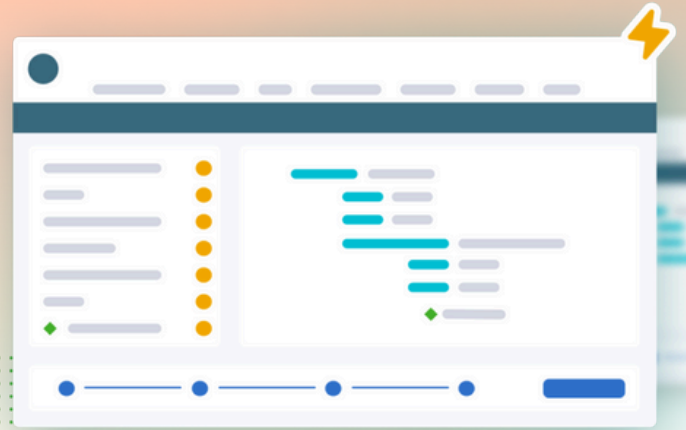


TASKRAY

Project Templates & Automation

TaskRay's Salesforce-native project management accelerates project planning and setup with templates and automation.

Streamline handoffs, assign resources by skills, and speed up customer onboarding while eliminating manual inefficiencies.



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CUSTOMER SUCCESS

Deliver faster, more efficient, and more profitable projects

TaskRay eliminates inefficient manual processes in project management. Automate tasks, streamline planning, and free your team to focus on exceptional customer onboarding.

Improve efficiency, reduce churn, and establish a standardized work management framework.



INCREASED VALUE

Standardize and scale with TaskRay.

TaskRay simplifies creating an efficient work management framework. Standardized processes ensure consistent experiences and faster project delivery.



Proactively manage complexity across your organization.

Create repeatable processes to better manage details across teams, product lines, and customer segments.

Get it right the first time, every time.

Take the guesswork out of work management with templates and automation for a consistent and successful customer experience.

Reduce manual work, save time, and focus on what matters.

Templatized and automated processes reduce manual work so teams spend more time building strong customer relationships.

TASKRAY

The #1 Salesforce-Native Work Management Solution

TaskRay Makes It Easy to Automate Your Project Workflows



Template Hub & Builder

Create or iterate from existing templates in order to streamline and standardize your repeatable processes.

[LEARN MORE](#) ➤



Template Migration

Build and test templates in sandbox environments before moving them over to production.

[LEARN MORE](#) ➤



Stitcher

Build custom projects by joining together multiple templates and task groups.

[LEARN MORE](#) ➤

Other Great Features to Help You Supercharge Your Project Management



TASK WEIGHTING

Assign different weights to tasks based on their importance or the effort required to make project completion progress information more accurate.



PROJECT HIERARCHY

Organize your projects through any combination of layers, like projects, subprojects, task groups, tasks, and checklists.



TEMPLATE VERSIONING

Make changes to post-sale processes, track how the changes affect efficiency and experience, and prevent unintended modifications.



PROJECT CLONING

Clone existing projects to create new projects while copying over all tasks, task groups, checklists, files, and other project information.



SALES & CUSTOMER SUCCESS HANDOFFS

Ensure a seamless transition by distributing all key details from your sales team to your post-sale team with an out-of-the-box onboarding Kick-Off Flow.



CUSTOMER ONBOARDING SCORES

Measure the success of onboarding projects using customer-configurable qualitative and quantitative factors.

Excited about future TaskRay capabilities?

Discover upcoming features on our horizon and have a say in what comes next!

[EXPLORE OUR ROADMAP](#) ➤

Want to see TaskRay in action?

Our Salesforce-native onboarding solution is easy to implement and user-friendly. Talk to a TaskRay expert to keep teams and customers connected and on track during critical initial moments.

[BOOK A DEMO](#) ➤



With hundreds of 5-star AppExchange reviews and recognition from G2 as a High Performer and Momentum Leader, TaskRay is a trusted partner to help you achieve successful outcomes.



TASKRAY

The #1 Salesforce-Native Work Management Solution