

The background of the slide is a dark blue overlay on a light blue background. It features a smartphone in the center, a bar chart on the left, and a line graph on the right. The bar chart has several bars of varying heights, with some labeled with numbers like 60650, 83220, 86500, and 75543. The line graph has a single line with a few data points, one of which is labeled 80000. The overall aesthetic is professional and data-driven.

TracAnything: Revolutionizing Enterprise Operations with Salesforce-Native Innovation

This case study explores how SalesHub's TracAnything, a comprehensive Salesforce-native ERP platform, transformed enterprise operations across six critical business functions. By centralizing project management, financial analysis, business operations, vendor management, and development processes into a single ecosystem, organizations achieved significant improvements in efficiency, transparency, and decision-making capabilities.

The Enterprise Challenge: Fragmented Systems & Manual Workflows

Before implementing TracAnything, organizations struggled with disconnected systems that created significant operational inefficiencies. The lack of integration between critical business functions resulted in data silos, delayed decision-making, and reduced productivity across departments.

Fragmented Data Ecosystem

Business-critical information spread across multiple disconnected platforms created barriers to collaboration and comprehensive analytics. Teams spent excessive time reconciling data rather than analyzing it.

Manual Approval Bottlenecks

Approvals for projects, budgets, vendor onboarding, and travel requests relied on manual routing and paper-based processes, creating administrative bottlenecks and delaying business activities.

Limited Visibility & Transparency

Stakeholders lacked real-time insights into project performance, budget tracking, and resource allocation, undermining confidence in decision-making and creating reactive rather than proactive management.

Unstructured Documentation

Requirements gathering, user story documentation, and test case creation occurred in disconnected systems without clear traceability, leading to deployment delays and increased post-implementation changes.

These challenges created a compelling need for an integrated platform that could streamline workflows, centralize data, and provide comprehensive visibility across the enterprise.

TracAnything: A Comprehensive Six-Module Solution

TracAnything delivers a complete enterprise resource planning solution built natively on the Salesforce platform. This integrated approach eliminates the need for multiple disconnected systems while leveraging the power, security, and extensibility of Salesforce.

The platform consists of six specialized modules designed to address specific business functions while maintaining seamless data flow between departments. Each module delivers targeted functionality while contributing to a unified operational ecosystem.

BSA

Business Systems Analysis module for requirements management and testing

PMO

Project Management Office module for project demand and resource coordination

FP&A

Financial Planning & Analysis module for budgeting and forecasting

BizOps

Business Operations module for expense and travel management

VMS

Vendor Management System module for supplier relationships

DevOps

Development Operations module for sprint and release management

By integrating these modules on a single platform, TracAnything eliminates data silos and creates a unified source of truth for the entire organization.

Business Systems Analysis (BSA): Accelerating Requirements to Deployment

The BSA module transforms how organizations gather requirements, document user stories, and create test cases. By establishing clear traceability from initial requirements through deployment, this module significantly reduces the common disconnect between business needs and technical implementation.

"The clear traceability from requirement plans to deployment ensures fewer change requests post-go-live, dramatically improving our implementation success rate."

The module streamlines the entire requirements lifecycle, providing structured templates and automated workflows that ensure consistency and completeness. This systematic approach has reduced requirement-to-test cycle time by 25%, enabling faster implementation with higher quality outcomes.

Requirement Gathering

Structured templates with guided workflows ensure comprehensive business needs documentation

User Story Creation

Automated conversion of requirements into prioritized user stories with acceptance criteria

Test Case Development

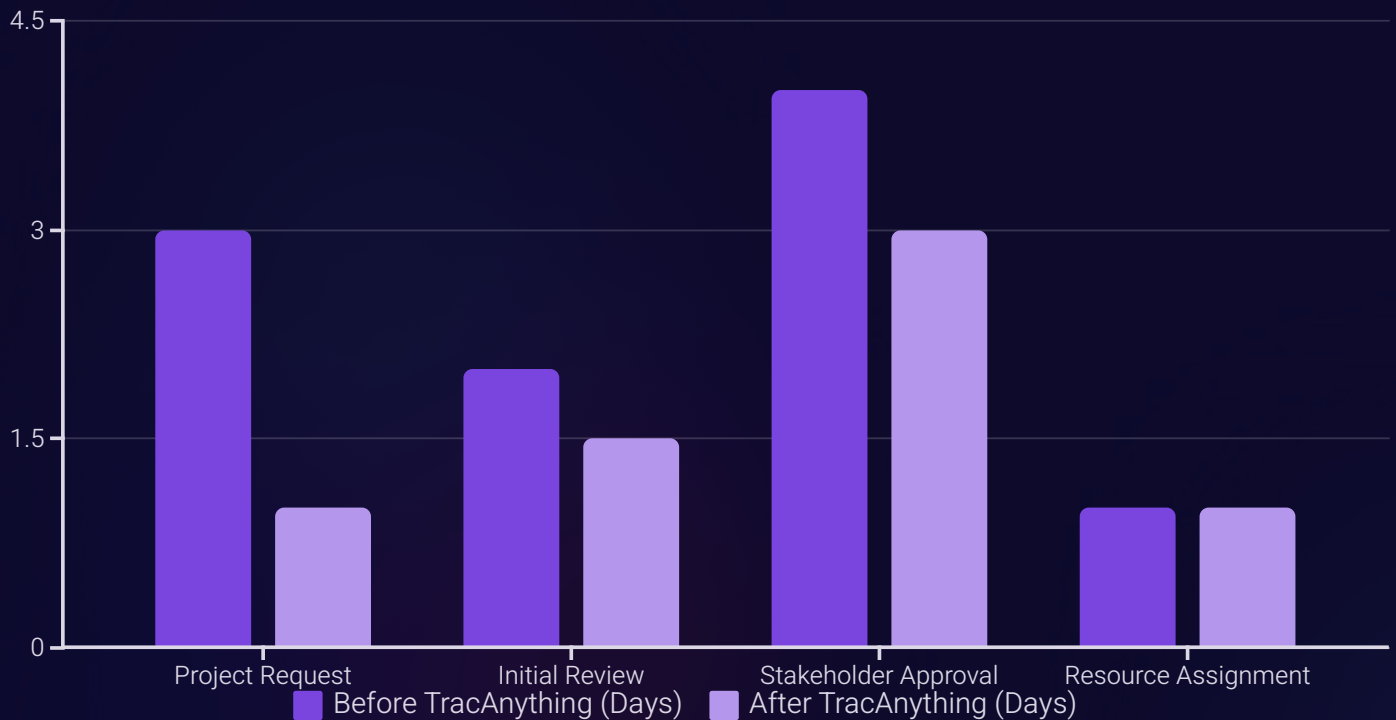
Direct linking of test cases to requirements ensures complete validation coverage

UAT & Implementation

Streamlined user acceptance testing with direct traceability to original requirements

Project Management Office (PMO): Streamlining Project Governance

The PMO module centralizes project demand management, approval workflows, and resource allocation. By integrating cost centers and deliverables into a unified system, organizations gain comprehensive visibility into project portfolios and resource utilization.



The implementation of TracAnything's PMO module resulted in a 35% reduction in approval cycle time, decreasing from 10 days to just 6.5 days. This acceleration is achieved through automated routing, parallel approval processes, and unified stakeholder dashboards that provide complete project visibility.

✔ Key PMO Benefits:

- Unified stakeholder dashboard improves decision-making speed
- Automated approval workflows reduce administrative overhead
- Resource forecasting tools optimize allocation and prevent bottlenecks
- Integrated cost tracking provides real-time budget visibility

Financial Planning & Analysis (FP&A): Transforming Financial Operations

The FP&A module consolidates budget creation, variance tracking, and financial forecasting directly within Salesforce. This integration eliminates the need for separate financial systems and spreadsheets, creating a single source of truth for all financial data.

Organizations implementing the FP&A module experienced a 20% reduction in budget preparation time through streamlined processes and automated data collection. More significantly, forecast accuracy improved substantially due to the centralization of financial data and real-time KPI monitoring.

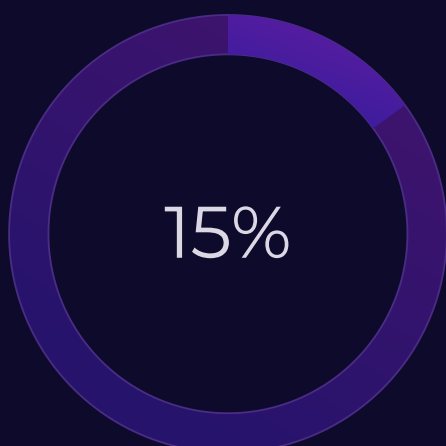


TracAnything's FP&A module provides comprehensive financial visibility through interactive dashboards and real-time reporting. The platform enables finance teams to shift from data collection to strategic analysis and decision support.



Budget Prep Time Reduction

Less time spent on data gathering and reconciliation



ROI Forecast Accuracy

Business Operations & Vendor Management: Optimizing Back-Office Functions

BackOffice BizOps

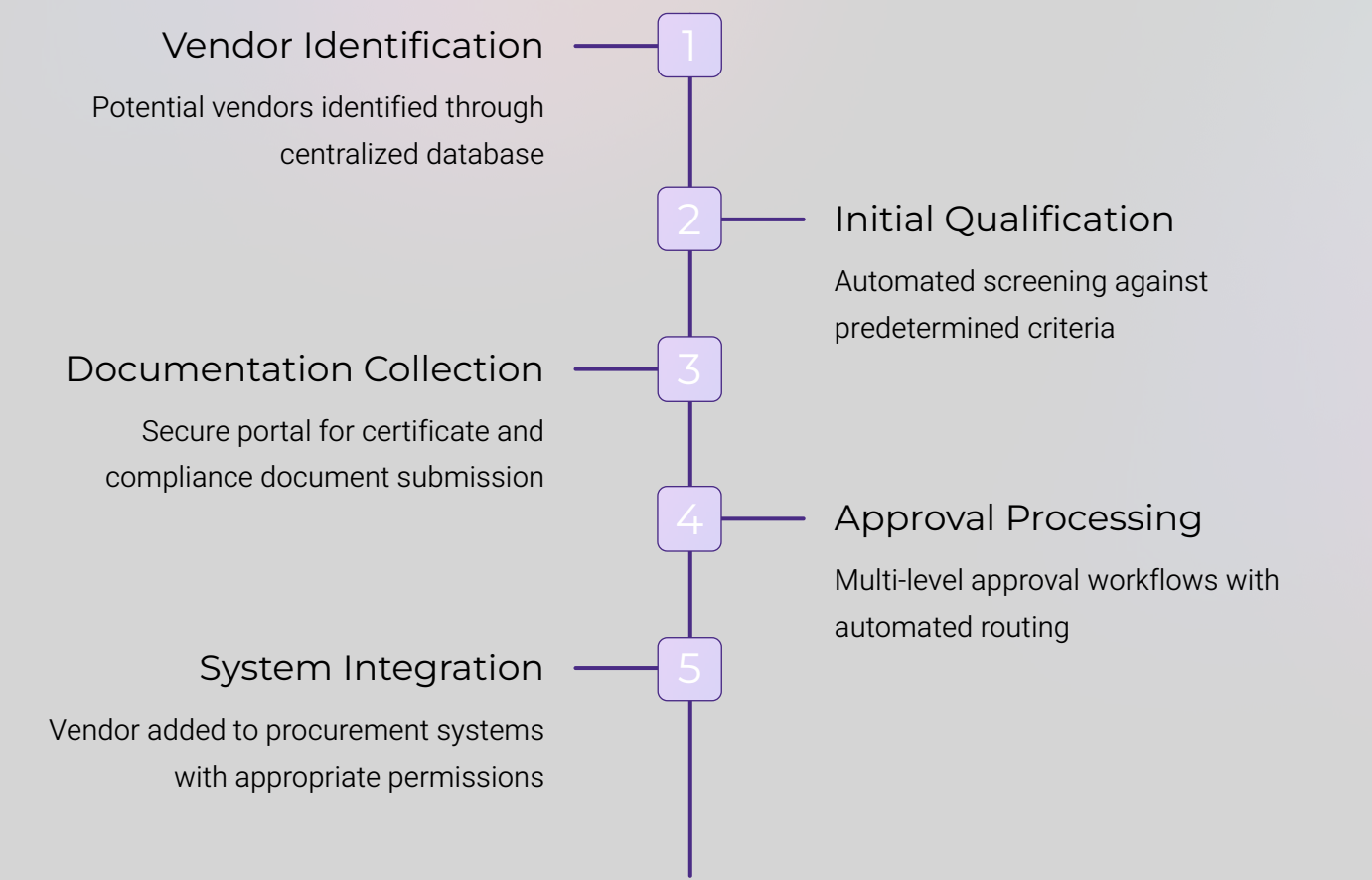
The Business Operations module streamlines expense management and travel requests within a single system. By automating approval workflows and integrating with financial systems, organizations achieved a 40% reduction in travel approval processing time.

- **Enhanced compliance:** Automated policy enforcement ensures all expenses meet company guidelines
- **Improved audit readiness:** Comprehensive documentation and approval trails
- **Simplified expense reporting:** Mobile submission and tracking capabilities

Vendor Management System (VMS)

The VMS module transforms supplier relationships through automated onboarding, performance scoring, and contract management. Organizations reduced vendor onboarding time from 15 days to just 9 days—a 40% improvement.

- **Streamlined onboarding:** Automated document collection and verification
- **Performance management:** NPS-linked evaluations for objective scoring
- **Contract lifecycle:** Automated renewal notifications and amendment tracking



Both modules deliver significant efficiency improvements while enhancing compliance, visibility, and process consistency across previously fragmented back-office functions.

TrackDevOps: Enhancing Development & QA Collaboration

The TrackDevOps module brings structure and visibility to development cycles by managing sprint schedules and user acceptance testing directly within the Salesforce ecosystem. This integration creates seamless connections between business requirements and technical implementation.

Organizations implementing the TrackDevOps module reduced sprint reporting effort by 30% through automated dashboards and standardized metrics. More importantly, the platform enhanced collaboration between development and QA teams, resulting in measurable improvements in UAT pass rates.



Sprint Planning

Automated capacity planning and story point allocation based on historical velocity data



Development Tracking

Real-time progress monitoring with automatic status updates and blocking issue alerts



QA Integration

Direct connection between test cases and development stories with automated test script generation



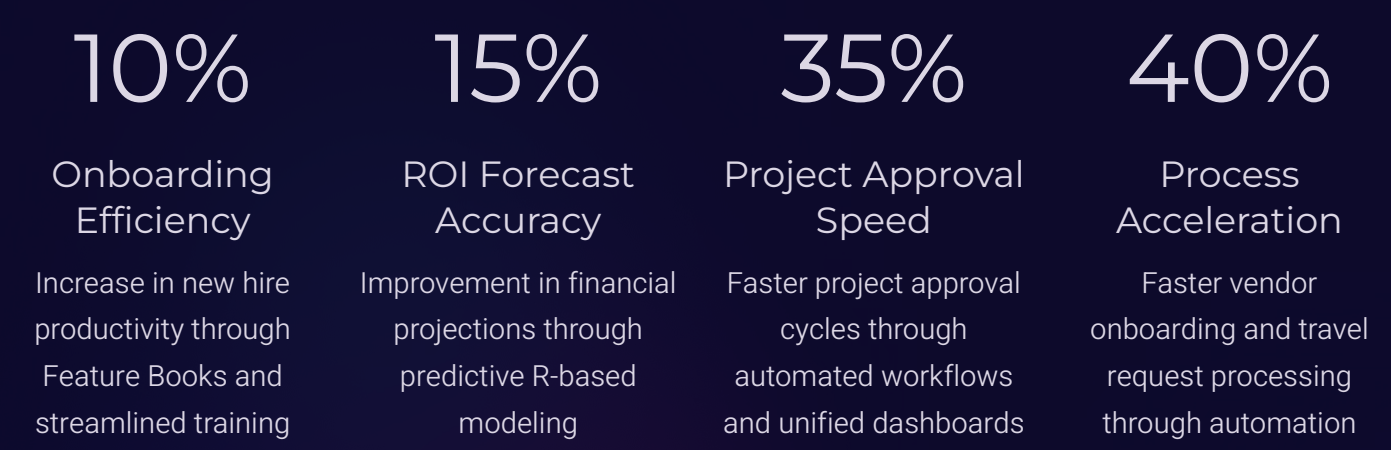
UAT Management

Structured user acceptance testing workflows with defect tracking and resolution pathways

"The integration between our development processes and business requirements has eliminated the translation gaps that previously caused implementation delays and post-launch issues."

Measurable Business Impact Across the Enterprise

The implementation of TracAnything delivered significant, quantifiable improvements across multiple business functions. By centralizing operations on a single platform, organizations achieved both efficiency gains and strategic advantages.



Beyond these quantitative metrics, organizations reported significant qualitative improvements, including enhanced collaboration between departments, increased data transparency, and improved stakeholder confidence in project outcomes.



Future Innovation: AI-Powered Operational Intelligence

While TracAnything has already delivered significant operational improvements, the platform's roadmap includes AI-powered enhancements that will transform it from a process enabler to a predictive decision-making partner.



AI-Driven Predictive Analytics

Machine learning algorithms that forecast project delays, cost overruns, and vendor performance issues before they occur, enabling proactive management.



Natural Language Processing

Automated conversion of meeting transcripts into structured requirement documents, accelerating the requirements gathering process.



Intelligent Approval Routing

AI-based scoring and routing that identifies the optimal approval path based on project attributes, reducing bottlenecks.



Anomaly Detection

Real-time identification of unusual spending patterns, resource allocations, or schedule deviations that may indicate underlying issues.

By integrating these AI capabilities, TracAnything will evolve from a system of record to a system of intelligence, providing not just operational efficiency but strategic insight and foresight.

"TracAnything's modular approach delivers measurable operational efficiency today, while its AI roadmap promises to transform how enterprises operate with agility, foresight, and data-backed confidence."

For organizations seeking to consolidate disparate systems, streamline workflows, and gain comprehensive operational visibility, TracAnything offers a proven solution with demonstrable ROI and a clear path to continued innovation.