

Salesforce as a Project Management Platform

Using Salesforce project management apps opens up a wide array of options for automation, customization and consolidated project reporting. I was recently helping a client use Salesforce for project management and was greatly impressed with the capabilities of Salesforce as a development and business process modeling (BPM) platform. Customer relationship management is Salesforce's specialty, but the architecture they've built can be leveraged for all sorts of solutions. Here are my thoughts on Salesforce project management capabilities.

Using Salesforce Project Management for Scheduling

If you own Salesforce, you should consider using Salesforce for project management. First, there are several scheduling tools on the Salesforce app exchange. I liked Inspire Planner because it had the most robust scheduling capabilities, but there is also TaskRay and other scheduling tools. All of them have a scheduling tool at the core, but bundle other functionality like Kanban boards and resource management. None of them have the advanced features of a MS Project or Primavera, but those advanced features, like resource load leveling, are only going to be used by professional schedulers. These scheduling apps will suit the needs of 99% of your users. Most offer free sandbox trials so you can select the best fit.

Utilizing a native Salesforce scheduling app has several advantages:

- Tasks assigned in the schedule can be assigned and completed by users in their Salesforce task list. They don't need to access the project schedule.
- The schedule is saved as Salesforce data, so it can be used easily for reporting. If you utilize standard milestones in your project plans, you can create summary reports which pull the key milestone dates directly from the schedule.
- Standard project tasks can be linked to automation within Salesforce, like forms for data entry and prompts for document uploads.
- Salesforce's ease of configuration can be utilized to customize data fields, reports and dashboards.
- You don't need to maintain separate user lists for assigning tasks, as you would in an external tool.

The benefits of a project manager being able to assign a task in the project plan and then not have to follow up with the assigned user is a huge time saver. When the task is assigned, it will land on the person's standard Salesforce task queue. When the person completes the task it will

automatically update the status of the task on the schedule, so the project manager has visibility to completed and past due tasks. No more exporting the project schedule to Excel or a PDF to share it with others. No need to email people to alert them to an assigned task. In fact, alerts for past due tasks can be automated using Salesforce's Flow tool.

There is also a huge benefit to the people assigned the tasks: they have a single list of assigned tasks across all projects which they can sort chronologically. A person can easily be working on multiple projects and also have ad hoc tasks assigned from their managers. They don't need to track all the demands on their time separately, it is now all their Salesforce task list.

Using Automated Salesforce Project Management

Every project management office (PMO) I've seen has to spend a lot of manual time consolidating status reports and key milestone dates across all projects. If you can tell project managers to include the key reporting milestones as standard tasks, these summary reports can be completely automated. The key is the standard task ID. You can create a standard task ID objects in Salesforce which standardizes key dates like: project approval date, end of analyze phase, first release date, and end date, etc. This list of standard task IDs can then be added as a lookup field on the project schedule, so the project manager can assign the standard task IDs to their custom tasks in their project schedule. This allows the project manager to designate which task in their custom schedule corresponds to the standard task used for reporting.

Assign standard task IDs to the project schedules allows building automated reports and workflows. The system knows that if it needs to report the first release date for a project it queries the project schedule for the end date associated to standard task ID '1.10.01 - First Release Date'. In addition, all the standard milestone dates will be immediately updated on all the various summary reports if the project is re-scheduled. Everyone has visibility to the new dates at the same time. Automated alerts can even be built to notify certain individuals if specific milestone dates shift. Note, publishing updated milestone dates based on a schedule change can be problematic but I'll address in a separate detailed post.

I'm most excited about how the use of Salesforce and standard task IDs provides the ability to blend the forecasting capabilities of the project schedule with business workflows. If a user is supposed to capture specific data as part of a standard task, a custom form (e.g. screen flow) can be created and linked to the standard task. When the user opens the associated assigned task, they can be presented with a link that opens the appropriate form. A link to a standard procedure can also be embedded in the task. The process I worked on was very document-intensive so users were presented with the existing documents they needed to reference to complete the task, as well as, the user was prompted to upload documents they needed to create as part of the current task.

Tying process flows to the schedule also allows the schedule to be simplified. Rather than listing all the tasks required for an activity on the schedule, the project manager just lists the overall activity and assigns it to the person with the first task. The workflow is then kicked off which manages and assigns the individual detailed tasks.

Using Salesforce to Capture Project Data

There is a lot more to project management than scheduling tasks and workflows. There are planning, estimating, and reporting processes among others. These non-scheduling processes can also be supported by Salesforce for they consist mainly of capturing and reporting data. The decision you need to make is where to store this data. I recommend either building your own project objects in Salesforce or using a Salesforce app with a site-based license. If you expand the popular Salesforce scheduling tools to store and report project data then every one who views that data must have a seat license for the scheduling app. This can get expensive quickly.

I recommend implementing a core project management solution for the data storage and reporting functions and then integrating this solution with other specialized apps for scheduling, estimating, etc. If you don't want to build your own core Salesforce project management solution, two options you should investigate are the Salesforce Project Management Tool (PMT) and my app Project Lifecycle Pro.

PMT is built by Salesforce Labs and is free. The only catch is that it uses Service Cloud cases for documenting project issues. This means that users will need a Service Cloud license which would add considerable cost if you don't already have Salesforce Service Cloud.

Project Lifecycle Pro was released in the Fall of 2023 and I'm quite proud of it. It uses a site license to encourage broad use within your company at a reasonable cost. It supports all the people, process and technology aspects of a project. It also has advanced features for data access, dependency management, estimating and dashboard reporting. You can get free demos and other information at the AppExchange listing here: [Project Lifecycle Pro](#).

In Conclusion

To summarize, if you are involved in the 99% of projects that don't require the advanced features of a MS Project or Primavera schedule, and you already own Salesforce, you should consider building or enhancing your project management solution on Salesforce. Go to the AppExchange and search 'project management' for a list of more than 300 Salesforce project management apps. Download their free trials to get a feel for their capabilities.