



CLOUD COACH PROJECT MANAGEMENT

Simple or Complex - the choice is yours

Our four tiers of project management tools deliver exactly what you need to plan and execute projects successfully. Based on over ten years of customer-driven research, Cloud Coach includes the most important capabilities project managers depend on to get their job done fast and accurately.

CREATE PROJECTS From your favorite Salesforce records

The screenshot shows a Salesforce Opportunity record for 'TechBuild Onboarding'. The record details include: Account Name (TechBuild Co.), Close Date (7/5/2017), Amount (\$90,000.00), and Opportunity Owner (Richard Fitzgerald). A progress bar at the top shows stages leading to 'Close...'. A green dotted arrow points from the 'Close...' button to a green callout box that says 'Automatically create projects when opportunities close'. This callout points to a sidebar on the right showing 'Milestone Projects (1)' and 'Products (1)'. The sidebar for 'Milestone Projects (1)' lists 'Techbuild Onboarding' with details like 'Project Ga...', 'Project Gantt', 'Health (Tra...', and 'Calculated ... 7/5/2017'. The sidebar for 'Products (1)' is also visible.

Whether it's a customer onboarding project, IT development effort, or a marketing campaign, Cloud Coach lets you launch projects directly from your favorite Salesforce records:

- Get a true 360° view of your accounts
- Launch projects based on your business rules
- Connect with any Salesforce based objects



Functionality Available by Tier

- Milestones
- Professional
- ◆ Enterprise
- ◆◆ Ultimate

Cloud Coach specializes in enterprise-class project, PSA & PPM software built for businesses that want to make strategic investments in their success. With our unique four-tier approach to project management solutions, as your business grows, Cloud Coach can grow with you. Learn more at www.cloudcoach.com



LEVERAGE PROJECT TEMPLATES

Automate project creation & save time

CREATE NEW

CREATE FROM TEMPLATE

Save

Save as Template

▼ Project Details

* Name

Dreamforce

Description

Trade show project plan

Type

Marketing

Location

San Francisco

* Desired Start Date

4/4/17

☐ Template | Cloud Coach Implementation
 ☐ Template | Customer Onboarding
 ☐ Template | Sales Cloud Implementation
 ☒ Template | Trade Show

NAME	DESIRED START DATE	DURATION	PARENT TASK	ASSIGNED RESOURCES	MILESTONE SUB TASKS
Marketing Plan	6/19/17	3			View
Graphic Design	4/4/17	7	Marketing Plan		View
Setup Booth	5/4/17	1	Marketing Plan		View
Plan, Shoot, Edit Video	4/14/17	3	Marketing Plan		View
Drawing / Give-Away	4/10/17	6	Marketing Plan		View

Create your own templates with pre built resource assignments

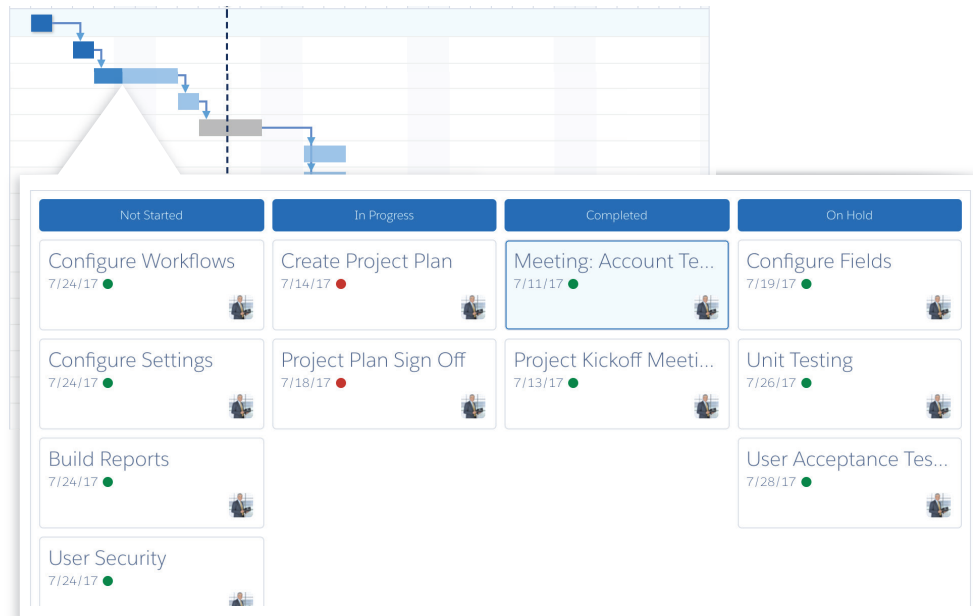
Get a head start on project creation by launching your own best-practice project templates. You can even automate project creation using Process Builder and your own specific business rules:

- Create templates to follow your best practices
- Pre-assign resource skills to speed delivery
- Save time - Automatically create projects



SEE YOUR PROJECTS

In the view that works for you



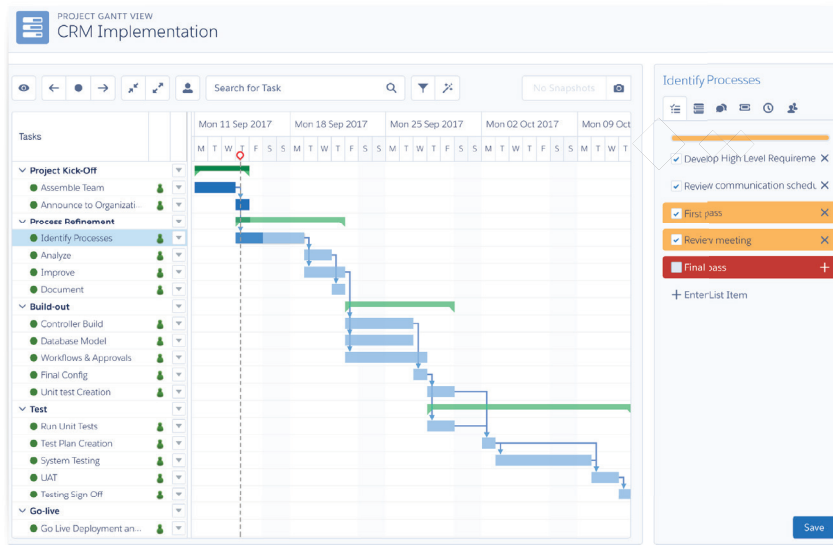
Whether you prefer working with a Gantt style timeline or a Kanban board, Cloud Coach allows you to work with your project in multiple ways. And if you have trouble making your mind up, changing between views is as simple as clicking a button.

- Next generation Gantt charts with critical path and baseline snapshots
- Agile boards with drag-and-drop updates
- Spreadsheet like list views



STAGE GATE

For product development projects



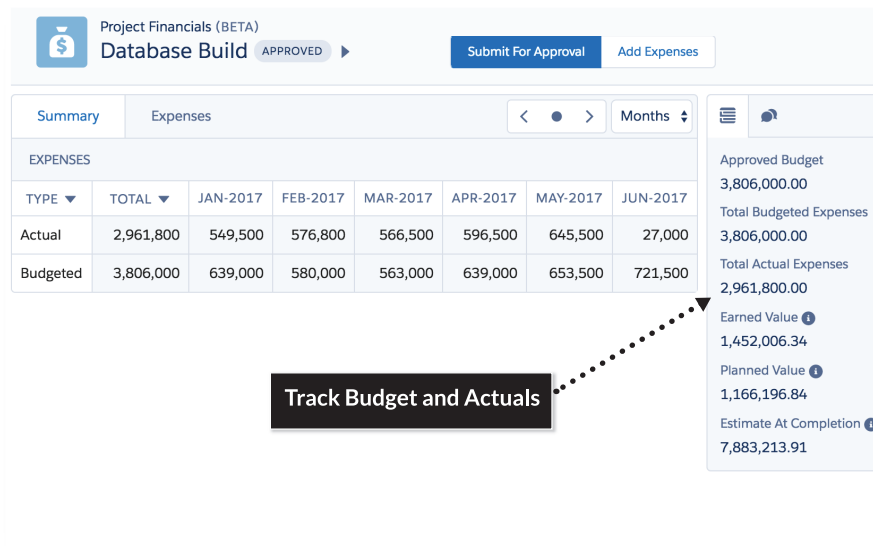
Cloud Coach is perfect for managing your stage or phase gate development projects. With best in breed Gantt charts, workflow processes, approval mechanisms and reporting, Cloud Coach gives you:

- Visibility into gate progress
- Gate approvals before progression
- Gate reporting and analytics



BUDGET AND TRACK

Your project financials



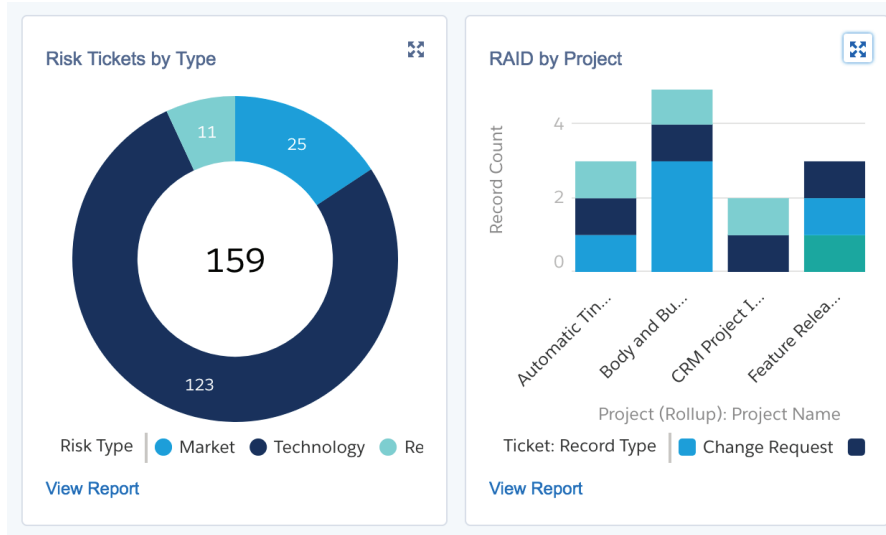
You're not just responsible for delivering your projects on time. Your executives also want to see your project's financial performance. Cloud Coach has full fiscal capabilities to help you:

- Budget your project spend by month, cost area, and CAPEX v OPEX
- Import actuals from your financial system such as SAP, Oracle, or SAGE
- Add your internal labor cost of delivery, so you can see the complete fiscal picture



RISK, ISSUES, AND CHANGE

Manage them all effectively



Running projects effectively often involves juggling more balls than just timelines. With Cloud Coach throughout your project delivery lifecycle you can:

- Identify, mitigate and resolve risks
- Track issues against your projects
- Manage project change requests



DOCUMENTATION

Documents, meetings, and requirements

DOCUMENTS					
Filter by title...				Add Documents	
DOCUMENT NAME ↑	ADDED BY	DATE	RELATED TO		
Business Case - Acme	Nic Widhalm	9/14/2017	Record Database Upgrade	Download	
Statement of Work - Acme - 9.2...	Nic Widhalm	9/14/2017	Record Database Upgrade	Download	
Resource Snapshot thru Dec	Nic Widhalm	8/6/2017	Record Database Upgrade	Download	
Implementation Requirements	Nic Widhalm	8/3/2017	Client Workshops	Download	
Project Plan.pdf	Nic Widhalm	8/3/2017	Client Review & Sign-Off	Download	
Project Scope	Nic Widhalm	8/3/2017	Solution Architecture	Download	
Trade Show Booth	Nic Widhalm	8/3/2017	Trade Show Booth	Download	

cloud coach

Cloud Coach Implementation Plan

- Project Objectives
- Business Objectives
- Roles and Responsibilities
- Minutes
- Project Scope
- Change Management
- Communication Plan
- Project Close Out / Post Go-Live

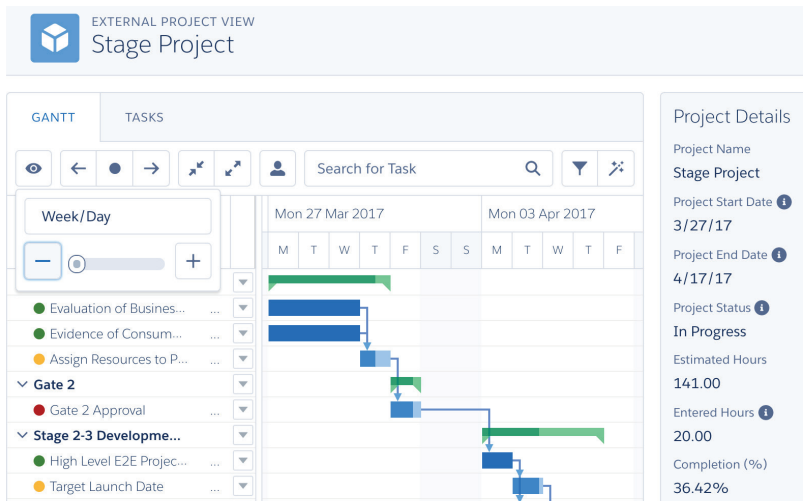
To get the full picture of your project, tracking documentation is critical. That's where Cloud Coach can help you the edge with:

- Project document storage
- Meeting minutes repository
- Capture project requirements



KEEP STAKEHOLDERS INFORMED

Share project status with customers



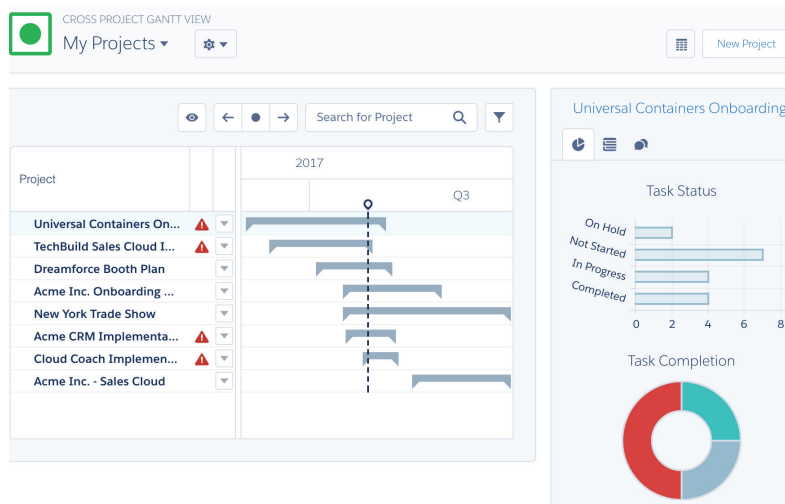
Whether you're dealing with a client facing project or managing an internal IT effort, you have internal and external stakeholders to manage and keep informed:

- Share real time project status with customers
- Track internal and external project stakeholders
- Send automated alerts to stakeholders



VISUALIZE PROGRESS

Across all your projects



Like most people in your position, you're juggling many projects at once. That's where our dynamic Cross Project Views gives you the edge:

- Create your own views based on project type
- View timelines and status information
- Update project information on the fly

