

WHY DOES TASK MANAGEMENT IN SALESFORCE MAKE SENSE?

If you're looking to scale in your project delivery you're likely to be running either a high volume of projects, have multi-faceted projects or suffer with a combination of the two. That creates a lot of moving parts; how do you stay on top of it all?

Gone are the days of spreadsheet task management and many people have realised that if you are looking for real customer success you'll need to manage the project lifecycle efficiently in one system, not many, in order to avoid the convoluted and time-consuming aspects of task management.

For many that system is Salesforce.

Salesforce Tasks are great as a 'to-do' list but with Precursive OBX and Salesforce, the classic tasks components of project management can be created in a few clicks, with project plans that work for you and your team, and in so doing, gaining that much needed visibility.

With OBX you get visual overviews of all activities and you can know at a glance where you are in a project lifecycle and which milestones are upcoming or surpassed. This creates the speed and accuracy needed for successful task management.

PRECURSIVEOBX

COLLABORATION

Gone are the days of popping over to a desk to check-in with a colleague or picking up the phone for a customer update. Instead, OBX can aid the traditional collaboration requirements, whether you use Chatter functionality or the bespoke sharing features of the tool in order to provide customer-facing data with the client at the click of a button.

WORK SMARTER, NOT HARDER

With everyone in a single system there's no needs to hunt for the data you require. Plus with the clear overview you know when a project may be about to go off-course. (Add in Precursive RCO for resourcing and you'll also see those dreaded capacity crunches well ahead of time in order to fix them)

PRIORITIZE TASKS - REDUCE PAIN

With multiple projects running concurrently you can ensure that you're not running the team in silos but instead see where and when projects need to be moved around; with that people can breathe easy and not burnout.

PRECURSIVEOBX

EFFICIENCY

With Task Management in spreadsheets you can't see what's working for your business; but if it all sits in Salesforce you can pull the data and analyse why and when things went off-course to ensure you better serve your customers in the future plus target your most profitable customers more easily, be they repeat or new.

THE REMOTE REALITY

Remote working isn't new but is more and more common. OBX stores your task data in the cloud, backed by Salesforce security, so is never out of date, unlike messy shared docs in a certain online drives or stagnate Excel sheets that rapidly outdate. Your team can assess from anywhere!

CUSTOMER SUCCESS

What if you promise a deadline and it's missed? What if milestones are regularly not met? Clearly mapped out tasks in OBX help you diagnose why before this happens. Deadline hit (or beaten) = happy customer

PRECURSIVEOBX

WHY PRECURSIVE TASK MANAGEMENT IN SALESFORCE MAKES SENSE

KEY FEATURES OF **PRECURSIVE OBX** TASK MANAGEMENT IN SALESFORCE

FEATURE	BENEFITS
Tasks	Break down a project & assign work to your teams
Boards	Boards are team workspaces with team members, tasks and Salesforce Chatter
Board View (Kanban)	Interactive Kanban Board with drag and drop task update functionality
Plan View (Gantt)	Advance Gantt chart for planning and scheduling complex projects
Table View	All the tasks shown in an interactive table
Checklists	Track to-dos against your tasks
Sub-tasks	Break down large tasks into subtasks
Contributors	Assign multiple people, customers or partners to tasks
Task Dependancies	Link tasks with dependencies for auto scheduling
Repeat Tasks	Set tasks to repeat daily, weekly, monthly
Time Tracking	Log time against tasks
Custom Views	View your own tasks or organise your work, your team’s work and your portfolio of projects
Project Milestones	Define your deadlines for percentage completion and billing
Templates	Import or automate templates to easily create new projects or tasks and avoid wasting time