**Salesforce Project**

**Project Title: Task & Activity Management Tool**

Small businesses and teams often struggle to organize daily tasks and customer interactions due to reliance on disjointed tools like emails, calendars, or manual lists, resulting in missed deadlines, overlooked follow-ups, and reduced productivity. These inefficiencies hinder effective customer relationship management and team coordination, particularly for organizations with limited resources. To address this, there is a need for a Salesforce-based Task & Activity Management Tool that extends the standard Task and Event objects, automates reminders and follow-ups using Workflow Rules or Flows, and leverages Salesforce Reports and Dashboards to provide visibility into task completion and activity trends, enhancing team efficiency and customer engagement at an affordable cost.

**Phase 1: Problem Understanding & Industry Analysis**

**Requirement Gathering (What to Track):**

* **Tasks:** Extend the standard Task object to capture:
  + Task Category (Follow-up, Meeting Prep, Admin, Customer Outreach)
  + Priority Level (Low, Medium, High)
  + Due Date (for automated reminders)
  + Linked Record (Lead, Contact, Opportunity, or Account)
  + Completion Notes (outcome or status update)
* **Events/Activities:** Extend the standard Event object to include:
  + Activity Type (Call, Email, Meeting, Other)
  + Outcome (Successful, Needs Follow-up, No Response)
  + Time Spent (in minutes)
* **Reporting:** Use Salesforce Reports and Dashboards to track:
  + Overdue tasks by user or team
  + Task completion rates (by category or priority)
  + Activity volume by type and user (calls made, meetings held)
  + Top linked records (most active Leads or Opportunities)
* **Automations:** Workflow Rules or Flows for:
  + Auto-reminders sent 24 hours before a task due date
  + Notifications for overdue tasks
  + Auto-creation of follow-up tasks after specific activities

**Stakeholder Analysis:**

* **End-User (Sales/Support Reps, Team Members):** Needs an easy interface to create, update, and view tasks/activities, with reminders to stay on track.
* **Team Lead/Manager:** Requires visibility into task progress, overdue items, and activity trends for performance monitoring.
* **Admin:** Configures custom fields, sets up automations, and creates dashboards with minimal technical expertise.

**Business Process Mapping:**

1. **Task Creation:** Tasks created manually or auto-generated from activities, linked to Leads/Contacts/Opportunities/Accounts.
2. **Task Prioritization & Management:** Users assign categories and priorities; due dates trigger reminders.
3. **Activity Logging:** Calls, emails, or meetings logged with outcomes; system suggests follow-up tasks.
4. **Follow-up Automation:** Flows send reminders for upcoming/overdue tasks; managers alerted for delays.
5. **Reporting & Insights:** Dashboards show:
   * Task status (Open, Overdue, Completed)
   * Activity trends (calls/emails per week)
   * High-priority task completion rates
   * Most active customer records

**Industry-Specific Use Case Analysis:**

* **Small Business CRM:** Centralizes task and activity tracking, improves follow-ups without costly add-ons.
* **Freelancer/Consultant Management:** Helps solo professionals track client interactions and workflows.
* **Team Productivity:** Supports small sales, support, or operations teams by streamlining task delegation and monitoring progress.

**AppExchange Exploration:**

Explore Salesforce AppExchange apps like:

* **Task Ray:** Lightweight task management with templates.
* **Activity Timeline by Salesforce:** Visualizes tasks/activities on records.
* **Salesforce Labs To-Do List:** Free app for basic task automation.
* **Click Up (via integrations):** Third-party task management integrations.

**Why Simple & Affordable?**

* **Low Complexity:** Uses standard Salesforce objects (Tasks, Events) with minimal customizations.
* **Cost-Effective:** Built on Workflow Rules/Flows and basic Reports/Dashboards, compatible with Salesforce Essentials or Lightning Professional editions.
* **Scalable for Small Teams:** Designed for 5–50 users, providing essential functionality without high development or licensing costs.