

Automated Task Management

Problem Statement

In many organizations, employees and sales reps manage their daily work through spreadsheets, emails, or manual notes. This fragmented and manual approach leads to missed deadlines, inconsistent follow-ups, and poor accountability. Managers lack visibility into overdue tasks, workload distribution, and overall team performance.

The absence of a centralized task management and reminder system creates critical challenges :

- **Missed Deadlines:** Without automated reminders, users forget important due dates.
- **Low Accountability:** Manual tracking makes it hard to identify ownership of tasks.
- **Manager Blind Spots:** Supervisors struggle to monitor team productivity.
- **Inefficient Reporting:** No consolidated data on open, completed, or overdue tasks.
- **Poor Productivity Insights:** Leadership cannot measure trends or optimize workloads.

Solution Framework

The solution is to build an Automated Task Management system on Salesforce that centralizes task creation, assignment, and tracking. Using Salesforce automation tools like Flows, the system will :

- Send proactive reminders to assigned users ahead of deadlines.
- Escalate overdue tasks to managers for accountability.
- Provide real-time reports and dashboards for visibility.

This transforms task management from a manual process into an automated, efficient, and measurable workflow.

Requirement Gathering

Translate business problems into a detailed set of functional, non-functional, data, and integration requirements for designing the solution.

- **Workshops with Managers & Employees:** Capture pain points with current task tracking.
- **Stakeholder Interviews:** Understand expectations around reminders, escalation, and reporting.
- **Document Analysis:** Review existing spreadsheets, emails, and manual methods currently in use.

Stakeholder Analysis

Stakeholder Group	Key Interest / Motivation	Potential Influence
Employees / Sales Reps	Timely reminders, clear task ownership	High
Managers	Visibility into team workload & overdue tasks	High
Admins	Configure automation & workflows	Medium
Executives	Productivity insights, accountability reports	High
Customers (optional)	On-time service requests/tasks	Medium

Document the current manual processes and illustrate how Salesforce improves them. Current Process (As-Is):

- Tasks tracked via Excel or emails.
- No structured reminder system → deadlines often missed.
- Managers manually follow up with employees.
- No consolidated reports or dashboards.

Proposed Process (To-Be with Salesforce):

- Tasks created & tracked centrally in Salesforce.
- Automated email/SMS reminders ahead of deadlines.
- Overdue tasks auto-escalated.
- Real-time dashboards show open, completed, and overdue tasks by user/team.

Use Case Analysis for Task Management

Objective: Show how the system addresses specific organizational challenges.

- **Task Completion Problem:** Deadlines missed due to lack of reminders.
Solution: Automated reminders and escalations.
- **Manager Visibility Problem:** Hard to track workload manually.
Solution: Dashboards and performance reports.
- **Overdue Task Handling Problem:** No escalation path for critical tasks.
Solution: Auto-escalation workflows in Salesforce.
- **Productivity Insights Problem:** No measurable data for trends or optimization.
Solution: Reports with insights on open, completed, and overdue tasks.

AppExchange Exploration

Objective: Explore Salesforce apps to enhance functionality and reduce custom build effort.

Potential Apps:

- Email/SMS notification apps → automated reminders.
- Calendar integration apps (Google/Outlook).
- Productivity tracking apps → efficiency measurement.

Evaluation Criteria:

1. Functional Fit: Task reminders, escalation, and tracking.
2. Platform Integration: Seamless with Salesforce Flows, Reports, Dashboards.
3. Scalability: Handle large task volumes without performance impact.
4. Cost: Licensing and maintenance feasibility.
5. User Reviews: Adoption and satisfaction by other organizations.