

Problem Understanding & Industry Analysis

Requirement Gathering

Core Functionalities:

Interactive task management hub with drag-and-drop functionality, multi-column layout for task organization, real-time collaborative editing, mobile-responsive Lightning interface, team task management with role-based access, comprehensive task analytics and reporting, task tracking and assignment, automated task archiving, email notifications for task updates, and complete audit trail for task history.

Technical Requirements:

Support 50+ concurrent users per task board, real-time component synchronization, mobile-first LWC design, Salesforce org integration, custom object data model, Lightning Design System compliance, automated task backup, cross-browser compatibility.

Stakeholder Analysis

Task Managers

Role: Task board facilitation, team productivity tracking, task analytics access, full admin permissions

Pain Points: Manual task management, poor task collaboration tools

Development Teams

Role: Quick task creation, visual organization, task status updates, participant-level access

Pain Points: Time-consuming task setup, ineffective collaboration tools

Team Leads

Role: Team workload monitoring, bottleneck identification, productivity reports, manager-level access

Pain Points: Lack of actionable insights, difficult progress tracking

Project Coordinators

Role: Cross-team analysis, methodology compliance, coordination insights, coordinator-level access

Pain Points: Fragmented data across teams, inconsistent task processes

Project Managers

Role: Progress tracking, deliverable insights, resource planning data, read-only dashboard access

Pain Points: Disconnected task workflows, manual report compilation

Business Process Mapping

Task Management Flow:

Task Creation → Team Assignment → Collaborative Work → Real-time Updates → Task Completion → Task Archive → Performance Tracking

Key Processes:

1. **Task Setup** - Custom task board creation and configuration
2. **Real-time Collaboration** - Live task updates and organization
3. **Visual Organization** - Drag-and-drop task categorization
4. **Progress Tracking** - Collaborative task status management
5. **Task Assignment** - Work item creation and assignment workflow
6. **Data Archival** - Automated task storage and backup
7. **Performance Analytics** - Progress monitoring and reporting

Task Board Management:

Board Creation → User Assignment → Active Collaboration → Progress Monitoring → Task Completion → Data Archive → Analytics Review

Industry-Specific Use Case Analysis

Task Board Types:

- **Development Tasks** (sprint-based, development focus)
- **Project Milestones** (deliverable-based tracking)
- **Team Workload** (daily task management)
- **Process Tasks** (operational workflows)
- **Issue Tracking** (bug and incident management)

Management Workflows:

- **Standard** (Team Lead managed)
- **Self-Organized** (team-driven tasks)
- **Cross-functional** (multi-team projects)
- **Executive** (leadership oversight)

Board Configuration:

Custom task templates, priority levels, time-tracking features, automated notifications, integration with project tools

AppExchange Exploration

Communication:

Slack for Salesforce (team notifications), **Microsoft Teams** (meeting integration), **Chatter** (internal collaboration)

Integration:

MuleSoft Anypoint (external tools), **Jira Connector** (ticket management), **Confluence** (documentation sync)

Analytics:

Einstein Analytics (sentiment analysis), **Tableau CRM** (executive dashboards), **Custom Lightning Reports** (team insights)

Security & Collaboration:

DocuSign (task agreements), **Box Integration** (document sharing), **Shield Encryption** (data protection), **SSO Connectors** (enterprise authentication)

Success Metrics

Efficiency:

Real-time collaboration, 80% user adoption rate, 50% setup time reduction, 99.5% component uptime

Team Engagement:

90% participation rate, 4.5/5 satisfaction score, 70% mobile usage, <2 second load times

Process Improvement:

40% increase in task completion rates, 85% task assignment accuracy, 60% faster issue resolution, complete task audit trails

Document Information

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