

# Delivery on Your Salesforce Spine

Capacity planning, task execution and governance — turning a plan into governed delivery on one record.

## EXECUTIVE SUMMARY

Delivery teams plan in one place and execute in another. Capacity is guessed in spreadsheets, tasks are handed out over chat, timesheets never reconcile to the plan, and overruns surface only when it is too late to act.

**Project 360 turns a plan into governed delivery on the same Salesforce record your business already runs on.**

This paper describes how Project 360 unifies the project workspace, a visual capacity planner, task execution with real progress tracking, and timesheets with governance — one security model, one audit trail, and a complete history of who did what, and when.

**1**

GOVERNED  
WORKSPACE /  
PROJECT

**1**

CAPACITY PLANNER

**0**

MIDDLEWARE  
LAYERS

**100%**

SALESFORCE-  
NATIVE

## THE PROBLEM

### Delivery lives in spreadsheets and chat

*A plan that isn't connected to execution is just a document.*

When capacity, assignments and time all live outside the system of record, delivery leaders fly blind. Nobody can see who is free and who is over; an assigned task drifts out of the plan the moment it is sent over chat; timesheets don't tie back to the work; and there is no reliable history of ownership when something needs to be traced.

#### COMMON CHALLENGES

- Capacity guessed in spreadsheets
- Tasks assigned over chat, easily lost
- No link from timesheet to the plan
- Progress and overruns invisible until late
- No history of who did what, and when

#### WHAT PROJECT 360 DELIVERS

- A visual capacity heatmap per team and week
- Drag-and-drop assign / reassign with rules
- Timesheets tied to tasks and approvals
- Live progress %, hours and overdue alerts
- Full task history — creation, owners, comments

## THE APPROACH

### Plan and execute on one record

Project 360 is built natively on Salesforce. Each project carries its own governed workspace, and every task, assignment, timesheet and approval writes to the same spine as the rest of the business. There is no

synchronisation between planning and delivery because there are not two systems — the plan and the work are the same record.

## THE WORKSPACE

### The Project DNA workspace

Every project carries the artefacts a delivery lead actually runs on — its 'DNA'. Plan-and-govern artefacts include a RACI matrix, a project checklist, a scope-and-exclusions register, RAG status reports with percent-complete, and health snapshots with governance gates. Execution artefacts include a data-migration tracker, per-project timesheet roll-ups, one-click status-report export to PDF or Word, and phase approvals with a clean audit trail.

## CAPACITY PLANNING

### The Capacity Planner

*See who is free, who is over, and where the next task should go.*

The Capacity Planner is a drag-and-drop heatmap of the team by week. Each cell shows committed hours against available hours, colour-coded from under-utilised to over-committed, so load is legible at a glance. Managers drag task chips onto a person and day to assign or reassign; the estimate and work description are captured at the drop, and past days are locked.

#### SEE & ASSIGN

- Team by week capacity heatmap
- Under / healthy / near-full / over colouring
- Drag chips to assign or reassign
- Hours captured at the moment of assignment

#### GOVERN THE BOARD

- Assign and reassign restricted to managers
- An empty project can only be seeded by a manager
- A reassignment reason is required and logged
- Assigned and last-reassigned timestamps recorded

## EXECUTION

### Tasks, progress and history

From assignment to done, every task tracks its own story. Assignees log completion percentage, the environment the work was performed in, hours spent and work notes; the task raises an alert to its owner on assignment and flags itself overdue on a new day. Managers and employees alike can hover any task to see a summary card: its creation date and author, every previous assignee and reassignment reason, and a consolidated view of its comments and work log.

#### A COMPLETE AUDIT TRAIL, BY DEFAULT

Creation date and author captured on every task.

Every assignee and reassignment reason, in order, retained.

Progress, environment, hours and notes logged over time.

Timesheets tie time back to the task and the plan.

## GOVERNANCE & ROLES

### The right people, the right actions

Project 360 separates what managers do from what employees do, and enforces it on the platform rather than in the UI. Managers plan and assign; employees report progress on their own work. Assignment and

reassignment are restricted to managers, and seeding the first task on an empty project is restricted further to a genuine project manager. Timesheets flow through native approval, and governance phases carry their own approvals — every action attributed and logged.

#### MANAGERS

- Assign and reassign across the team
- Create tasks and set estimates and scope
- Approve timesheets and governance phases
- See the whole team's capacity and history

#### EMPLOYEES

- Report progress on their own tasks
- Log hours, environment and work notes
- See assignment history on any task
- Cannot assign, reassign or self-approve

#### BUSINESS OUTCOMES

### What changes for delivery

- **Predictable delivery:** capacity is visible before commitments are made.
- **Accountable execution:** progress, hours and ownership are tracked on the record.
- **Trustworthy governance:** every assignment, timesheet and approval is logged.
- **One source of truth:** the plan and the work are the same governed record.

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**Project 360 — delivery on your Salesforce spine.** To see it configured for your delivery teams, book a walkthrough at [zucitree.com](https://zucitree.com).