WORK-RELAY
Complex work. Made simple.

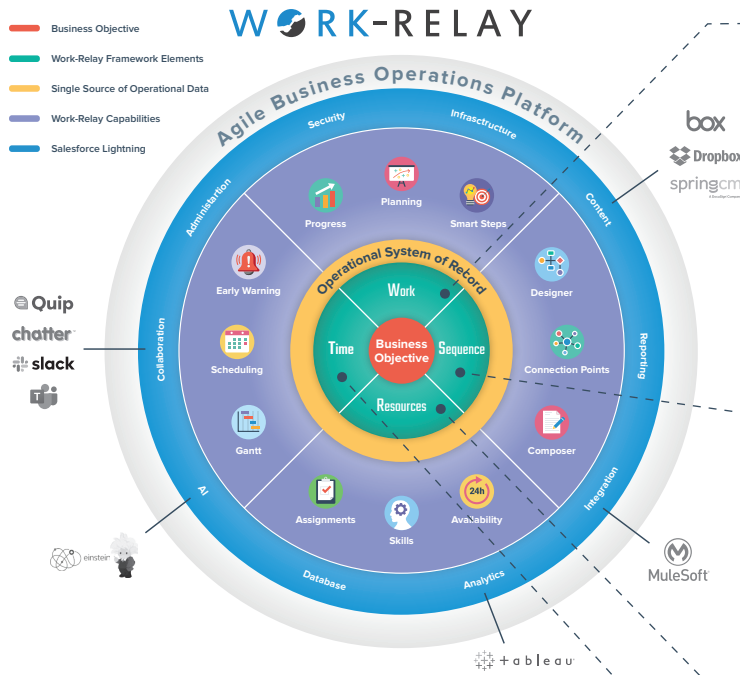# Agile Business Operations Management for Salesforce

Implementation

WORK-RELAY

Legend:

- **Business Objective**
- **Work-Relay Framework Elements**
- **Single Source of Operational Data**
- **Work-Relay Capabilities**
- **Salesforce Lightning**

Agile Business Operations Platform

- Security
- Infrasctructure
- Administartion
- Content
- Collaboration
- Reporting
- AI
- Integration
- Database
- Analytics

Operational System of Record

- Progress
- Planning
- Smart Steps
- Early Warning
- Designer
- Scheduling
- Connection Points
- Gantt
- Composer
- Assignments
- Skills
- Availability (24h)

Work · **Sequence** · **Resources** · **Time** · **Business Objective**

box
Dropbox
springcm
A DocuSign Company

Quip
chatter
slack

einstein

MuleSoft

tableau

Work-Relay Glossary

WORK-RELAY

Agile Business Operations Platform

Legend:
- Business Objective
- Work-Relay Framework Elements
- Single Source of Operational Data
- Work-Relay Capabilities
- Salesforce Lightning

Business Objective

The business objective is the well-defined, agreed-upon, deliverable from a business service.

Work-Relay Framework Elements

The framework is used to design the work to be done, the sequence in which the work must be done, the resources required to do the work, and the timeframe in which it should be completed.

Single Source of Operational Data

The Operational System of Record is a single source of truth database that contains work done, being done, and to be done. It provides common metrics across all business services for analytics and for SLA and KPI monitoring. It provides the basis for monitoring, managing, and optimizing business services.

Salesforce Lightning

Work-Relay is a 100% native Salesforce application, so it automatically inherits all the power of Salesforce, including security, collaboration, analytics, and AI.

The Work to be done

Progress Scorecard

A real-time, at a glance representation of all instances of a service by process step.

Planning Dashboard

A complete view of all tasks in all services with filtering, grouping, sorting, and resource assignment.

Smart Steps

A set of productivity enhancers built into the design and user consoles.

The Sequence in which work is done

Designer

A simple, comprehensive designer for building business services of any level of complexity. Includes workflows, forms, Kanban boards.

Composer

Services can be dynamically composed to form end-to-end connected services. This can be done dynamically using rules and constraints, or manually on-the-fly.

Connection Points

Connection points are a way to create relationships among services that have many-to-many relationships. They are also used to provide an end-to-end representation of the business service that includes all interrelated services.

The Resources to do the work

Assignments

Manual and automated assignments based on resource skills required to complete a task and resource availability.

Skills

A skills and attribute database allows search by multiple criteria.

Availability

Resource availability calendars.

The Time in which to complete the work

Early Warning

Using buffer management, provide a Schedule Risk Indicator for early warning of potential delays.

Scheduling

Point-and-click creation of complex scheduling algorithms, soft and hard dates, optional sub-process date recalculation, gap management parameters.

Gantt Chart

Integrated with the processes behind the bars on the Gantt, buffer management visualization, critical path.