

CRM Enhancement: Outlook Reminders for Sales Future Lead Dates

Enhancement Name	Auto-Assigned Tasks for Sales Future Lead Dates
Reps Impacted	All CRM users
Can CRM Users Opt-Out?	No
Rollout Date	Weekend of Oct 17
Enhancement Summary	When a rep populates the 'sales future lead date' field on a lead in CRM, a task is automatically created in CRM - this task is also pushed to the rep's Outlook. The Outlook task defaults to 11am CST and includes a link directly to the CRM lead. Users will receive an alert at 11am CST via Outlook on the day that the task is due. Additionally, when viewing tasks in Outlook, users can view a running list of upcoming tasks.
Benefit to Users	<ul style="list-style-type: none">• Boosted visibility to upcoming sales future lead due dates• Proactive alerts reminding user of due date• Outlook involvement in sales future lead due dates vs the user having to navigate only through CRM views

