Helm

Share an execution language.
No translation required.

Helm is an **Activity Management** tool that allows leaders to manage activities instead of task lists, so they can streamline the execution of multiple projects, programs, and processes at once.

MENTALLY MAP & ORGANIZE ACTIVITIES

Simplify your workflow by managing and grouping what needs to be done by activity, instead of tasks that can't evolve over time.

SHARE REQUIREMENTS & RESOURCES

Give a business activity every chance to succeed, by packaging all its resources, to-do's, and progress records in one sharable place.

ADAPT TO MINOR & MAJOR CHANGES

Handle process, resource, and people changes with features that manage distribution, broadcasting, and evaluations in bulk.

Simplify with Activities

Simplify your workflow by managing and grouping what needs to be done by activity, instead of tasks that can't evolve over time or handle bulk actions.

MANAGE ACTIVITY CYCLES

Streamline repeatability for an event series or ongoing process, by building and updating multiple activities at once.

ASSIGN & RE-ASSIGN

Re-assign activities to new assignees through bulk features that make last minute and big team changes simple.

PUSH CHECKLIST ITEMS

Don't disrupt your workflow with long searches. Select the activities to apply checklist items immediately.
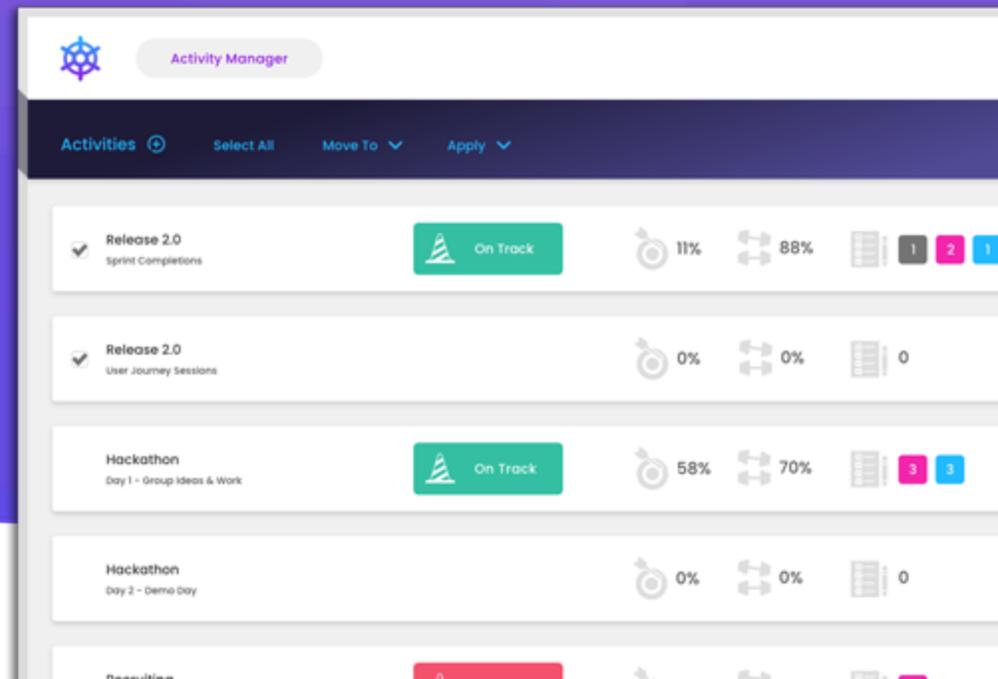
MASS ATTACH RESOURCES

Smoothly support process growth by sending out resources that multiple activities need at once.

ADD & MASS-EDIT SUB-LABELS

Apply sub-labels to activities to differentiate them and add organization to your workflow
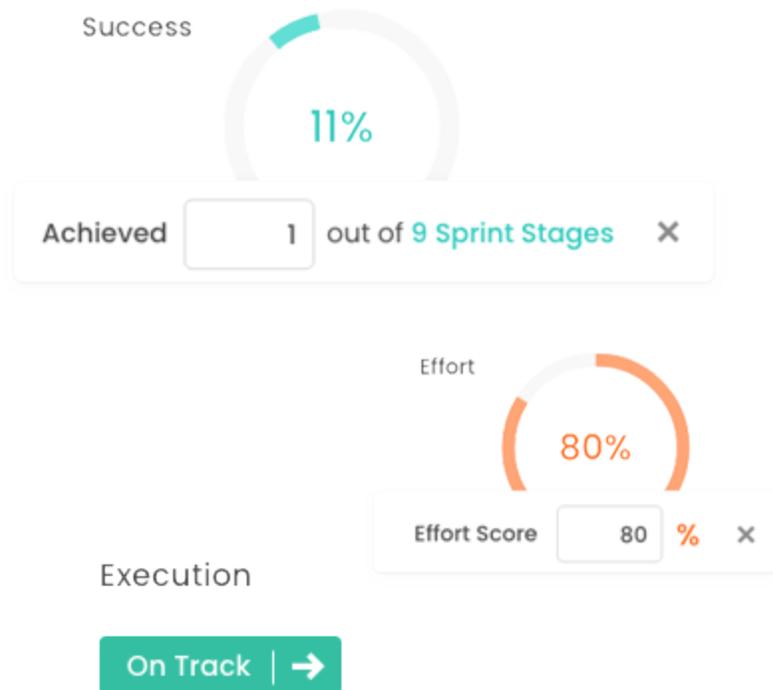
GROUP UNDER INITIATIVES

Organize your workflow and plan a bigger picture by grouping activities by Initiatives which can have their own higher level success goal.

Activity Manager

Activities

Select All   Move To   Apply

✓ Release 2.0 Sprint Completions	On Track	11%	88%		1 2
✓ Release 2.0 User Journey Sessions		0%	0%		0
Hackathon Day 1 - Group Ideas & Work	On Track	58%	70%		3 3
Hackathon Day 2 - Demo Day		0%	0%		0

Define Progress Expectations

Track activity targets, the effort or time put into an activity, and execution statuses that, when weighed together, can tell you if there's a people or process gap that's holding you back.

Success

11%

Achieved 1 out of 9 Sprint Stages ✕

Effort

80%

Effort Score 80 % ✕

Execution

On Track →

VANITY-FREE METRICS

Focus each activity on a realistic measure for success, so that progress isn't blinded by checklist completion

EFFORT SCORING

Track performance effort or bandwidth for each activity, to surface problem vendors, assignments, and processes

EXECUTION STATUSES

Identify if execution is experiencing a challenge or a full-stop barrier, to identify bottlenecks and process problems

GLANCE-READY ANALYTICS

Focus in on activities that need your attention from process, people, or resource gaps

Assign Checklist Items

Keep overlapping projects and processes separate for tracking, by using shared checklist items that push their statuses across all activities and people.

ADJUSTABLE TASK STATUSES

Change the status of a task using the states typically found in project management: Open, In Progress, Completed, Closed

SHARE TASKS & TASK STATUSES

Share a task across multiple overlapping activities to push an execution momentum while keeping activities separate

GUEST USER LIMITATIONS

Limit external and internal assignees to only push tasks to a final "Completed" state, so that you can review them before they're closed

SET DEADLINES

Set checklist item deadlines that notify both you and the assignees associated with them when they become overdue

Complete guest schedule packages	Today	In Progress →
Negotiate with venue on contract length	Tomorrow	Open →
Find missing speaker	Thursday	Completed →
Trigger online campaign	July 28	Completed →

Link Resources & Requirements

KEEP IT ALL IN ONE PLACE

Ensure that every employee and external vendor has everything they need to successfully execute an activity with link and file attachments

Keep resources & specialty tools linked to activities, to keep everything everyone needs in one place.

DISTRIBUTE RESOURCES QUICKLY

Re-distribute new resources by mass-attaching them to multiple activities at once.

| Checklist | Progress | Resources |

Ria attached a link   1 day ago
🔗 http://google.sheet/estimations

Ryan attached a link   1 day ago
🔗 http://dev.steersoft.azure

Ria uploaded a file   10 days ago
📎 dev-working-agreement.pdf

📎 Upload File
🔗 Attach Link

Attach