

# Phase 1: Problem Understanding & Industry Analysis

- **Project Title:** Recruitment Management System (HR CRM)
- **Industry:** Human Resources (Talent Acquisition & Candidate Management)
- **Project Type:** B2B Salesforce CRM Implementation

- **Target Users:**

- ❖ **Candidates** (seeking jobs & applying)
- ❖ **Employers / HR Managers** (posting jobs, reviewing applications)
- ❖ **Recruiters** (shortlisting, scheduling interviews)
- ❖ **Interviewers** (conducting interviews & providing feedback)
- ❖ **Management / Admin** (monitoring recruitment KPIs, reports, dashboards)

- **Problem Statement:**

Companies face challenges in **managing recruitment processes manually**. Traditional hiring relies on spreadsheets, emails, and offline systems, leading to:

- ❖ Difficulty tracking job applications and candidate status.
- ❖ Manual shortlisting and communication delays.
- ❖ Lack of structured interview scheduling and reminders.
- ❖ Inefficient collaboration between HR, recruiters, and interviewers.
- ❖ Absence of real-time dashboards for recruitment performance insights.

- To overcome this, the company wants to implement a **Salesforce CRM-based Recruitment Management System** that ensures seamless **job posting, application tracking, interview scheduling, and hiring analytics**.

### ➤ **Objectives:**

The proposed Salesforce CRM aims to:

- ❖ Automate job posting and candidate application tracking.
- ❖ Enable recruiters to manage candidate lifecycle (applied → shortlisted → interview → hired).
- ❖ Allow HR managers to schedule interviews and notify candidates/interviewers.
- ❖ Provide dashboards to monitor recruitment pipeline, open jobs, and hire-to-rejection ratios.
- ❖ Improve collaboration between HR, recruiters, and interviewers with centralized data.

### ➤ **Industry-Specific Use Case Analysis:**

#### • **HR & Recruitment Industry Needs:**

- ❖ Job posting and application tracking.
- ❖ Candidate database with skills & experience records.
- ❖ Automated interview scheduling & reminders.
- ❖ Analytics for time-to-hire and recruitment effectiveness.
- ❖ Secure handling of candidate personal information.

### ➤ **Use Cases:**

#### **1. Job Management**

- ❖ HR creates Job Posts (title, department, location, experience, salary).
- ❖ Recruiters publish job openings on career portal.
- ❖ Jobs can be opened, closed, or archived.

## **2. Candidate Application**

- ❖ Candidates apply online (form or portal).
- ❖ Applications auto-linked to Job Posts.
- ❖ Duplicate prevention using unique email.

## **3. Application Review & Shortlisting**

- ❖ Recruiters review applications and update status (Shortlisted, Rejected, On Hold).
- ❖ Automated emails sent to candidates on status update.

## **4. Interview Scheduling & Feedback**

- ❖ Interview scheduled via flow → notifications sent to candidate & interviewer.
- ❖ Interview feedback recorded (Pass/Fail + comments).
- ❖ Approval process for final hiring decision.

## **4. Reporting & Dashboards**

- ❖ Track job openings vs filled positions.
- ❖ Applications by status (pipeline funnel).
- ❖ Recruiter performance (time-to-hire, number of hires).
- ❖ Management dashboard with KPIs (monthly hires, rejection ratio).

## **➤ Stakeholder Analysis:**

- ❖ **Candidates** – Apply for jobs, track application status, attend interviews.
- ❖ **Recruiters** – Manage job postings, shortlist applications, schedule interviews.
- ❖ **Interviewers** – Provide feedback on candidates.
- ❖ **HR Managers** – Approve hiring decisions, oversee recruitment process.
- ❖ **Management** – Access dashboards for recruitment performance.

➤ **Business Process Mapping (High-Level):**

- ❖ Employer/HR creates **Job Post**.
- ❖ Candidate applies → **Application record created**.
- ❖ Recruiter reviews & updates **Application Status**.
- ❖ If shortlisted → **Interview scheduled** & linked to candidate/job.
- ❖ Interview conducted → **Feedback recorded**.
- ❖ Application status updated → **Offer/Hired or Rejected**.
- ❖ **Reports & Dashboards** provide real-time recruitment insights.

➤ **AppExchange Exploration (Optional for later phases):**

- ❖ Recruitment & Applicant Tracking Apps (ATS).
- ❖ E-signature integrations for offer letters.
- ❖ Video interview integrations (Zoom, MS Teams).
- ❖ AI-powered candidate skill matching (Einstein AI).