

PROJECT TITLE

Smart Recruit

(Salesforce-powered Job Application Tracking System)

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

Current Challenge

Recruiters and HR managers manually track applications using emails and spreadsheets. This results in:

- Difficulty managing high volumes of applications.
- Missed follow-ups due to lack of automation.
- Poor coordination between recruiters and HR managers.
- No real-time visibility for leadership into recruitment metrics.

Functional Requirements (What the system must do)

1. Job Posting Management

- a. HR/Recruiters should be able to create job postings with fields like:
 - i. Job Title
 - ii. Department
 - iii. Location

- iv. Required Skills
 - v. Application Deadline
 - b. Recruiters should be able to update job postings when positions are filled.
- 2. Candidate Management**
 - a. Capture candidate information:
 - i. Name
 - ii. Contact Details
 - iii. Resume (File Upload or URL)
 - iv. Experience, Skills
 - b. Maintain a history of applications per candidate.
- 3. Application Tracking**
 - a. Each application should move through lifecycle stages:
 - i. Applied
 - ii. Shortlisted
 - iii. Interview Scheduled
 - iv. Offered
 - v. Hired / Rejected
 - b. System should automatically update status when recruiters take action.
- 4. Workflow Automation**
 - a. **Flows/Process Builder:**
 - i. Auto-create Interview record when an application is shortlisted.
 - ii. Auto-send email/SMS notification to candidates at key stages.
 - b. **Approval Process:**
 - i. Offer letter stage must be approved by HR Manager.
- 5. Notifications & Communication**
 - a. Email alerts to candidates (status updates).
 - b. Email notifications to recruiters (new application received).
 - c. Reminder notifications for interviews.
- 6. Reports & Dashboards**
 - a. HR Managers should have dashboards showing:
 - i. Applications by Job Posting.
 - ii. Applications by Status (Funnel: Applied → Hired).
 - iii. Recruiter Performance (applications handled, conversions).
 - b. Recruiters should be able to run reports on their own candidates.

Non-Functional Requirements (System qualities)

1. Usability

- a. Simple UI for recruiters to add/manage applications.
 - b. Lightning App with Tabs for Job Postings, Candidates, Applications, Interviews.
- 2. Scalability**
- a. Should handle many applications without performance issues.
- 3. Security**
- a. OWD: Applications private by default.
 - b. Recruiters can only see applications they own.
 - c. HR Managers can see all applications.
 - d. Field-level security: sensitive fields (salary expectations, offer details) restricted.
- 4. Reliability**
- a. Automated workflows should ensure no missed updates or communications.
- 5. Extensibility (Future Scope)**
- a. Later, system can integrate with external portals like LinkedIn or Naukri.
 - b. AI-based candidate ranking could be added.

Stakeholder Analysis

<u>Stakeholder</u>	<u>Role</u>	<u>Needs / Expectations</u>
HR Manager	Oversees recruitment process	- Access to recruitment KPIs via dashboards - Approval workflows for job offers - Compliance tracking
Recruiter	Manages job postings & candidates	- Simple interface for job posting & application tracking - Automated status updates - Email notifications for new application
Candidate	Applies for jobs	- Timely updates on application status - Transparent & fair process - Smooth communication

Management / Leadership	Reviews hiring metrics	- High-level dashboards & reports - KPIs like time-to-hire, offer acceptance rate - Data-driven insights for strategic decisions
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Business Process Mapping

Current Process (Manual System)

Recruitment is handled mostly through offline tools like emails, spreadsheets, and job portals. This results in inefficiencies, delays, and lack of visibility:

- **Job Posting Creation** → Recruiters prepare job postings in Excel or upload them to third-party job portals, with no centralized control
- **Candidate Application** → Applications arrive via personal or shared HR emails. Resumes are stored manually in folders, often leading to mismanagement.
- **Status Tracking** → Recruiters track candidate progress (Applied, Shortlisted, Interviewed, etc.) using spreadsheets. This is error-prone and not transparent.
- **Communication** → Recruiters send emails manually to update candidates, leading to inconsistent or delayed responses.
- **Leadership Monitoring** → Management has no real-time insights into recruitment KPIs like time-to-hire, offer acceptance, or pipeline health.

Limitations:

- Manual handling increases chances of errors.
- Delayed candidate communication impacts candidate experience.
- No centralized system → duplication of data.
- Lack of dashboards → leadership cannot take data-driven decisions.

Proposed Process (Salesforce-Powered ATS)

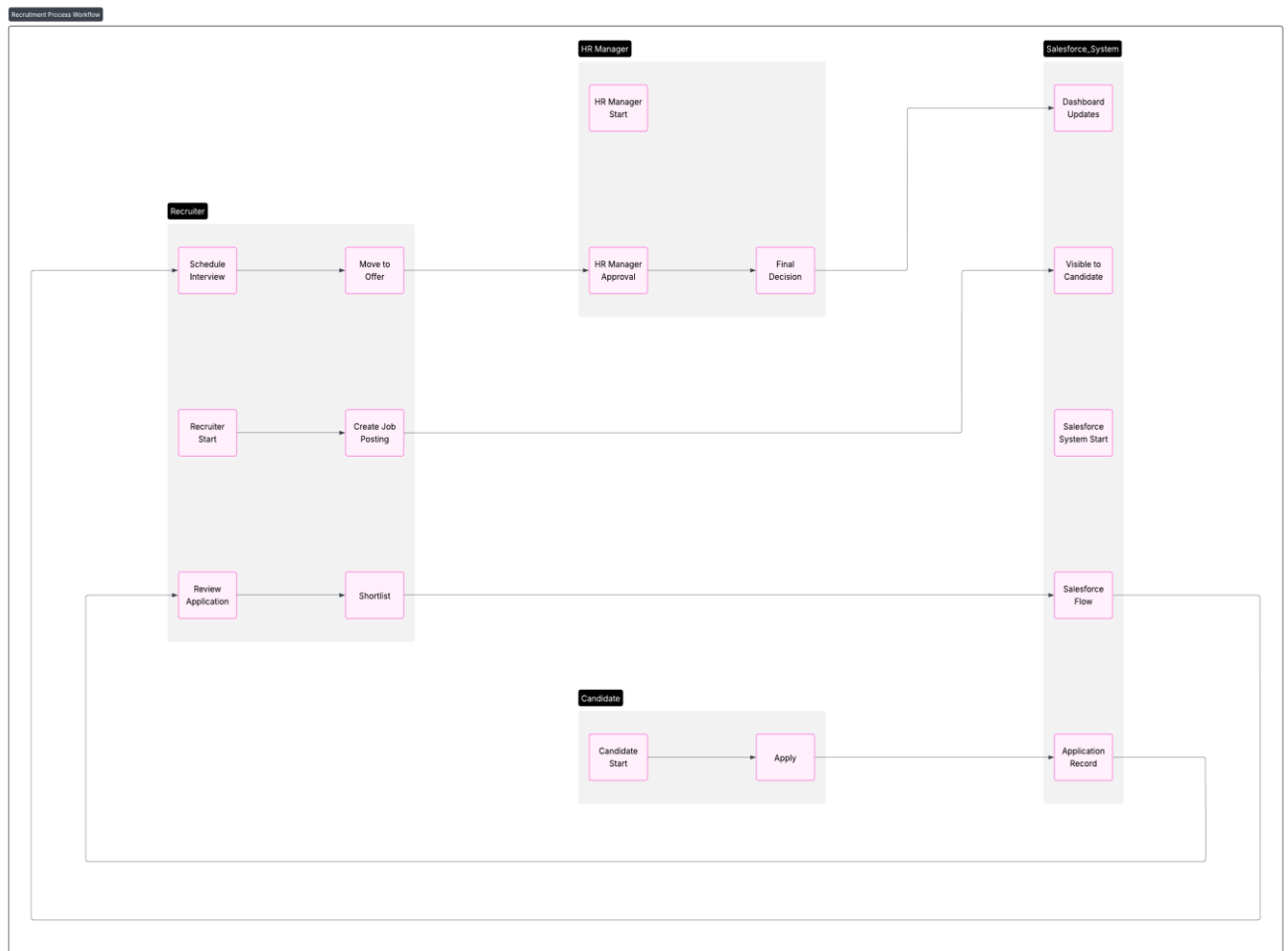
By leveraging Salesforce, the recruitment lifecycle becomes automated, transparent, and trackable in real time:

- **Job Posting Creation** → Recruiters create structured Job Posting records in Salesforce, specifying department, role, skills, and deadlines.
- **Candidate Application** → When a candidate applies, their details and resume are captured in a Candidate object, automatically linked to a Job Posting.
- **Application Lifecycle** → Applications move through defined stages (*Applied* → *Shortlisted* → *Interview* → *Offer* → *Hired/Rejected*).
 - When an application is **Shortlisted**, a **Flow** auto-creates an Interview record and sends an email notification to the candidate.
 - When status = **Offer**, an **Approval Process** routes the request to the HR Manager for final confirmation.
- **HR Manager Approval** → If approved, the application status updates to **Hired** and dashboards refresh automatically.
- **Automated Notifications** → Email alerts keep candidates informed at every stage.
- **Leadership Monitoring** → Dashboards and reports give real-time insights into hiring pipeline, recruiter performance, and bottlenecks.

Advantages:

- Centralized data storage → all records in Salesforce.
- Real-time communication with candidates → improves candidate experience.
- Automated workflows reduce manual effort.
- Dashboards provide actionable insights for HR and leadership.
- Scalable → system can handle hundreds of job applications simultaneously.

Workflow Diagram



Industry-Specific Use Case Analysis for Smart Recruit

1. IT Services & Consulting (TCS, Infosys, Wipro)

- **Challenge:** Thousands of applicants in campus drives, manual shortlisting, multiple interview rounds.
- **How Smart Recruit Helps:**
 - Auto-assign candidates to recruiters based on location/skill.

- Approval workflows for offer letters.
- Real-time dashboards of hiring funnel across multiple campuses.

2. Healthcare Industry (Hospitals & Pharma)

- **Challenge:** High demand for skilled nurses, doctors, pharmacists; manual hiring delays impact patient care.
- **How Smart Recruit Helps:**
 - Track applicant licenses & certifications as part of candidate records.
 - Automate scheduling of interviews with department heads.
 - Approval workflows for onboarding sensitive roles (like surgeons).

3. Retail & E-commerce (Amazon, Flipkart, Reliance Retail)

- **Challenge:** Seasonal hiring surges (festive seasons) → thousands of temporary staff applications.
- **How Smart Recruit Helps:**
 - Bulk import candidate applications from job portals.
 - Auto-screen candidates based on availability/shift preference.
 - Dashboards for HR to track store-wise hiring progress.

4. Banking & Financial Services (HDFC, ICICI, Deloitte)

- **Challenge:** Strict compliance; need to hire employees with verified backgrounds.
- **How Smart Recruit Helps:**
 - Track application → background verification → final approval.
 - Automate alerts for missing compliance documents (PAN, Aadhaar, KYC).
 - Dashboards for branch-wise recruitment stats.

5. Manufacturing & Logistics (Tata Motors, DHL, Mahindra)

- **Challenge:** Large blue-collar workforce recruitment, distributed across multiple plants/warehouses.
- **How Smart Recruit Helps:**
 - Region-wise recruiter assignment.
 - Candidate mobile app → easy application process for workers.
 - SMS/email alerts for interview scheduling.

6. Education (Universities & EdTech like Byju's, Coursera)

- **Challenge:** Hiring large teaching/administrative staff during academic sessions.
- **How Smart Recruit Helps:**
 - Manage separate pipelines for faculty vs administrative roles.
 - Approval workflows with academic deans for faculty selection.
 - Reports on hiring time per department.

Phase 2: Org Setup & Configuration – Smart Recruiter ATS

In this phase, the Salesforce environment for the Smart Recruiter Applicant Tracking System (ATS) was prepared and configured. The objective was to establish a secure, well-structured, and scalable foundation before implementing business processes. This setup ensures that organizational details, user management, and security controls are aligned with the recruitment workflow.