Corporate Training CRM (Corporate & Workforce)

Phase 1: Problem Understanding & Industry Analysis

- **Goal:** Understand why this system is needed.

1. **Requirement Gathering**

- Meet stakeholders HR managers, trainers, employees, compliance officers).
- Example requirements:
  - Track employee profiles (skills, department, certifications).Manage internships posted by employers.
  - Manage training modules and auto-assign based on role.
  - Remind employees before deadlines.
  - Generate reports on training completion rates.

2. **Stakeholder Analysis**

- **Admin:** Configures org and manages settings.
- **HR Manager:** Oversees training programs, compliance reports.
- **Trainer:** Conducts assigned trainings and updates progress.
- **Employee:** Receives training assignments and completes modules.
- **Compliance Officer:** Verifies certifications and deadlines.

3. **Business Process Mapping**
   Flow:
   Employee enrolled → Trainer assigned → Employee completes training → Status updated → HR notified.

4. **Industry-Specific Use Case Analysis**

- Corporates require centralized systems to track workforce training.
- Automated reminders reduce missed certifications.

- HR and compliance teams need quick reporting dashboards.

5. **AppExchange Exploration**

- Existing LMS tools exist, but we build a **lightweight Corporate Training CRM** tailored for workforce management.

Phase 2: Org Setup & Configuration

- **Goal:** Prepare Salesforce org.

1. **Edition:** Free Developer Org.
2. **Company Profile Setup** – Add Company info, currency = INR.
3. **Business Hours & Holidays** – Mon–Fri, 9–6; holidays = company holidays.
4. **User Setup – Roles:** Employee, Trainer, HR, Compliance Officer, Admin.
5. **Profiles** – Employee = limited access, Trainer = update training, HR = full access, Compliance Officer = reports only.
6. **Roles** – HR > Trainer > Employee.
7. **OWD** – Employee record = Private, Training = Public Read Only, Certification = Private.
8. **Sharing Rules** – HR can see all training progress.
9. **Login Access Policies** – Employees log in during business hours.

Phase 3: Data Modeling & Relationships

- **Goal:** Define structure.

1. **Objects**

- **Employee__c:** Name, Email, Department, Skills.
- **Training__c:** Title, Trainer, Deadline.
- **Certification__c:** Employee, Training, Status (Assigned, Completed, Overdue).

- **Trainer__c:** Name, Expertise.

2. Relationships

- Certification ↔ Employee (Lookup).
- Certification ↔ Training (Lookup).
- Training ↔ Trainer (Master-Detail).
- Certification works as a junction object between Employee & Training.

Phase 4: Process Automation (Admin)

- ➢ **Goal:** Automate workflows.

1. **Validation Rule:** Deadline passed → prevent completion update.
2. **Workflow Rule:** Send reminder 7 days before training deadline.
3. **Approval Process:** HR approval required for external training requests.
4. **Flow Builder:** Auto-assign trainer based on department.
5. **Email Alerts:** Employee notified when training is assigned/overdue.
6. **Field Updates:** Update certification status = Completed when finished.

Phase 5: Apex Programming (Developer)

- ➢ **Goal:** Add logic**.**

1. **Apex Trigger:** On Certification insert → decrement training slot count.
2. **SOQL:** Query trainings with available slots.
3. **Batch Apex**: Weekly report of overdue trainings.
4. **Queueable Apex:** Send bulk reminders to employees.
5. **Scheduled Apex:** Daily → email HR pending certifications.
6. **Future Method:** Call external learning portal API async.
7. **Test Classes:** Insert sample Employee + Training + Certification and verify.

Phase 6: User Interface Development

- **Goal:** Build user-friendly interface.

1. **Lightning App**: "Corporate Training CRM."
2. **Tabs:** Employees, Trainings, Trainers, Certifications.
3. **Home Page:** Reports on completion rates.
4. **Quick Action:** "Enroll in Training."
5. **LWC:** Training enrollment form.
6. **Apex + LWC:** Auto-assign certification record.
7. Reports visible in dashboards.

Phase 7: Integration & External Access

- **Goal:** Connect with external learning systems.

1. **Named Credentials:** Store LinkedIn Learning API credentials.
2. **External Services**: Pull training content from APIs.
3. **Platform Events:** "New Training Added."
4. **Change Data Capture:** Notify when certification status changes.
5. **OAuth Login:** Trainers access via secure login.

Phase 8: Data Management & Deployment

- **Goal:** Manage data & move changes.

1. **Data Import Wizard:** Import employee records.
2. **Data Loader:** Bulk upload certifications.
3. **Duplicate Rules:** Prevent duplicate employees.
4. **Data Backup:** Weekly export.
5. **Change Sets:** Deploy approval processes.
6. **Packages:** Unmanaged for demo.

Phase 9: Reporting, Dashboards & Security Review

- ➢ **Goal:** Training insights & compliance.

1. **Reports:** Completion rates, overdue certifications.

2. **Dashboards:**

    - HR Dashboard → Department-wise training status.
    - Compliance Dashboard → Certifications expiring soon

4. **Dynamic Dashboards:** Each Trainer sees only their employees
5. **Field-Level Security:** Hide personal employee details from Trainers.
6. **Audit Trail:** Track changes to certifications.

Phase 10: Final Presentation & Demo Day

➢ **Goal:** Showcase project.

- **Pitch:** Problem → Solution → Benefits.
- **Demo Flow:**
    - Add employee → Auto-assign training.
    - Reminder sent → Training completed.
    - Generate report → Completion % shown.
- **Handoff Docs:** Data model, flow diagrams, user guide.
- **Portfolio Showcase:** Post as "Built Corporate Training CRM on Salesforce."