Phase 1: Problem Understanding & Industry Analysis (Leave Tracker App)

Project Title

Leave Tracker App – Employee Leave Tracking & Approval System

Industry

Human Resources / Employee Management

Project Type

Salesforce Developer Org Implementation for Internal HR

Target Users

HR Managers, Team Leads, Employees

Problem Statement

Organizations face challenges tracking employee leave requests, approvals, balances, and compliance with company leave policies. Manual or email-based processes lead to approval delays, data inconsistency, and lack of centralized reporting, which hinders workforce planning.

To solve this, the Leave Tracker App will:

- Automate leave request submission and approval workflows.
- Track leave balances (annual, sick, casual, etc.) for each employee.
- Ensure policy compliance, prevent leave conflicts, and maintain historical data for audits.
- Provide dashboards and reports for HR and management to analyze leave trends.

Use Cases

- Employee initiates leave request via web/mobile form.
- System checks available leave balance and applies policy validations.
- Approvers (manager/HR) receive notifications and can approve/reject requests with comments.
- Leave balances are updated automatically upon approval.

- HR can view employee-wise leave history and download reports for compliance.

Requirement Gathering

- Stakeholder interviews: HR, Managers, Employees

- Existing process review: Manual forms, emails, spreadsheets

- Policy analysis: Leave types, rules, carry-forward policies

- Data points: Employee details, leave types, dates, approvals, balances

- Integration needs: Payroll, attendance systems, user provisioning

Stakeholder Analysis

- HR: Needs centralized control, audit history, policy enforcement

- Managers: Needs quick approval access, absence tracking for teams

- Employees: Needs seamless submission, leave balance visibility, mobile access

Business Process Mapping

- Map current leave request workflow (initiation, approval, balance adjustment).

- Identify pain points: delays, manual errors, lack of notifications, poor reporting.

Industry-specific Use Case Analysis

- Benchmark leave management best practices in similar-sized companies.

- Review regulatory compliance requirements for leave policies.

AppExchange Exploration

- Evaluate existing Salesforce leave tracker packages for features, gaps, and customizability relevant to the developer org.