**Recruitment ATS – Smart Hiring & Candidate Management Platform**

**Phase 1: Problem Understanding & Industry Analysis**

**Industry:** Human Resources / Talent Acquisition  
**Project Type:** Salesforce CRM Implementation (Admin + Developer)  
**Target Users:** Candidates, Recruiters, Hiring Managers, HR Admins

**Problem Statement**

Recruiters and HR teams face difficulties in managing the hiring lifecycle due to:

* **Scattered candidate data** in spreadsheets and emails.
* **Manual resume shortlisting** and lack of automated eligibility checks.
* **Delayed interview scheduling** and poor communication with candidates.
* **No single source of truth** for candidate progress (applied → shortlisted → interviewed → hired).
* **Limited analytics** on recruiter efficiency and hiring timelines.

This leads to **long hiring cycles, poor candidate experience, and missed top talent**.

**Goal**

Develop a Salesforce-based **Recruitment ATS** that:

* Centralizes **job postings, candidate applications, interviews, and offers**.
* Automates **resume screening, interview scheduling, and offer approvals**.
* Provides **real-time status tracking** for candidates and managers.
* Integrates with **LinkedIn/Job Portals for applications**.
* Generates **reports & dashboards** for recruiter productivity and hiring KPIs.

**Requirement Gathering**

**Business Needs**

* Unified system for **job openings, candidates, and interview tracking**.
* Automated workflows for **shortlisting, scheduling, and approvals**.
* Candidate-facing portal for **applications & status tracking**.
* Reports for **time-to-hire, offer acceptance, and recruiter performance**.

**Functional Requirements**

* **Candidate Object** → Name, Email, Phone, Resume (file), Skills, Status.
* **Job Opening Object** → Title, Department, Hiring Manager, Open/Closed.
* **Application Object** → Junction between Candidate & Job Opening, Status (Applied, Shortlisted, Interviewed, Offered, Hired, Rejected).
* **Interview Object** → Date, Time, Interviewer, Feedback.
* **Offer Object** → Role, Salary, Status (Pending, Approved, Rejected).
* **Approval Process** → Job offers require manager approval.
* **Automation Rules** → Auto-update status when feedback submitted.
* **Reminders** → SMS/email to candidates for interviews.

**Non-Functional Requirements**

* **Mobile-friendly** (Recruiters and candidates via Salesforce app).
* **Role-based access** (Candidate, Recruiter, Manager, Admin).
* **Scalable** for thousands of applications per month.
* **Secure file storage** for resumes and KYC docs.

**Stakeholder Analysis**

| **Stakeholder** | **Needs / Responsibilities** |
| --- | --- |
| **Candidates** | Apply easily, upload resume, track application status. |
| **Recruiters** | Manage job postings, shortlist candidates, schedule interviews. |
| **Hiring Managers** | Review shortlisted candidates, approve/reject offers. |
| **HR Admins** | Oversee process, manage security & compliance, run reports. |

**Business Process Mapping**

**Current Manual Process**

* Job openings posted on multiple portals without integration.
* Applications tracked in Excel, resumes shared via email.
* Interviews scheduled manually (lots of back-and-forth).
* Offer letters sent through manual templates.
* Reports built monthly, often delayed.

**Proposed Salesforce Process**

1. Recruiter creates **Job Opening** in Salesforce.
2. Candidate applies online (via LWC form or integration with LinkedIn).
3. Application record auto-created → candidate status = “Applied”.
4. Recruiter reviews → marks as “Shortlisted”.
5. **Flow automation** schedules interview → candidate notified via email/SMS.
6. After interview feedback, candidate status auto-updates.
7. Offer object created → sent for **Approval Process**.
8. Upon approval, candidate receives offer letter via Conga/DocuSign.
9. Dashboards show **time-to-hire, recruiter activity, offer acceptance rate**.

**Industry-Specific Use Cases**

* **Resume Screening Automation** → auto-assign candidates based on skills/keywords.
* **Candidate 360 View** → all applications, interviews, feedback in one profile.
* **Offer Approval Workflow** → automated routing to HR Manager.
* **Recruiter Productivity Dashboard** → number of hires per recruiter.
* **Candidate Communication Automation** → SMS/email updates for every stage.

**AppExchange Exploration**

* **JobScience Recruiting (Salesforce app)** → ready ATS features.
* **DocuSign / Conga Composer** → digital offer letters & contracts.
* **LinkedIn Connector** → direct job posting & candidate import.
* **FormAssembly** → candidate application forms.
* **SurveyMonkey** → candidate experience feedback after interviews.

**Phase 1 Summary**

By completing Phase 1, the project team will have:

* Identified **key hiring pain points** and automation opportunities.
* Defined **stakeholders** (Candidates, Recruiters, Managers, Admins).
* Documented **business processes** (manual vs Salesforce).
* Listed **functional requirements & objects**.
* Explored **AppExchange apps** to enhance recruitment workflows.