Employee Onboarding Application

Industry: Human Resources / Business Services

Target Users: HR Managers, Team Leads, New Employees, Department Heads

Problem Statement

Organizations often face challenges in onboarding new hires due to manual processes, missing documentation, delayed orientation, and lack of structured training schedules. These inefficiencies lead to poor employee experiences, higher attrition, and increased HR workload.

Functional Requirements

1. Automatically generate onboarding tasks such as document submission, email setup, and orientation.
2. Assign department-specific training modules to new hires.
3. Send automated email reminders to employees and managers for pending activities.
4. Provide dashboards and reports to track onboarding progress and completion rates.
5. Enable tracking of department-wise hiring and onboarding trends.

Non-Functional Requirements

1. Reliable and scalable automation for handling high volumes of employee records.
2. User-friendly interface for HR managers and employees.
3. Secure handling of employee personal data and documents.
4. Mobile accessibility for remote onboarding activities.

Stakeholder Analysis

1. HR Manager: Oversees onboarding tasks and ensures compliance.
2. Team Lead/Manager: Monitors department-specific onboarding and training.
3. New Employee: Completes assigned onboarding tasks and training modules.
4. System Administrator: Configures automation flows and maintains Salesforce org health.

Business Process Mapping

Current Manual Flow
1. Onboarding tasks tracked manually via spreadsheets or emails.
2. No centralized reminders for pending activities.
3. Delays in document submission and orientation scheduling.
4. HR team spends significant time following up with employees.

Proposed Automated Flow in Salesforce
1. Employee record creation triggers automatic task generation (documents, email, orientation).
2. System assigns training modules based on department.
3. Automated email reminders keep employees and managers updated.
4. Dashboards track onboarding progress, completion rates, and trends in real-time.

Industry-Specific Use Case Analysis

1. Large Enterprises: Standardize onboarding across multiple departments.
2. Startups: Ensure structured onboarding despite limited HR staff.
3. IT/Service Companies: Train new hires quickly with role-specific modules.
4. Remote/Hybrid Organizations: Enable paperless, digital onboarding accessible from anywhere.

AppExchange Exploration / Tools

1. DocuSign: For digital signatures of onboarding documents.
2. Conga: For document automation and compliance.
3. Salesforce Flows: To automate task generation and notifications.
4. Dashboards & Reports: Native Salesforce tools for onboarding insights.