Corporate Training CRM

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

The purpose of the Corporate Training CRM is to provide a centralized platform to manage employee training programs efficiently. Traditional methods like spreadsheets, emails, or manual tracking are time-consuming and error-prone.

Key Requirements:

- Track employee details, departments, and contact information.

- Maintain a catalog of training courses including trainer details and duration.

- Register employees for courses and track participation.

- Generate reports on course attendance and departmental training progress.

- Provide a simple dashboard for HR and training managers.

Expected Outcome:
A web-based CRM system that allows HR to manage employees, courses, and registrations efficiently, reducing administrative overhead and improving training program monitoring.

2. Stakeholder Analysis

The project involves multiple stakeholders:

- **HR Managers:** Oversee employee training, approve enrollments, and ensure alignment with organizational goals

- **Training Coordinators:** Manage courses, schedule sessions, and update registrations

- **Employees:** Participate in training and access course information

- **IT Administrators:** Maintain the system and ensure data security

- **Senior Management:** Monitor training effectiveness and ROI

Insight: The CRM must be user-friendly for HR and coordinators, while employees require easy access to course registration.

3. Business Process Mapping

Current Process:

- HR collects employee info manually
- Training announcements are sent via email
- Employees register manually
- Attendance is recorded during sessions
- Reports compiled at the end of the quarter

Proposed CRM Process:

- Employee data entered into the CRM
- Courses added and managed centrally
- Employees registered through a dashboard
- Attendance and completion automatically tracked
- Real-time reports available for HR and management

Benefits:

- Eliminates manual errors
- Reduces administrative effort
- Provides real-time visibility of training programs

4. Industry-specific Use Case Analysis

Challenges in Corporate Training:

- Inefficient tracking of employee progress
- Lack of visibility for management on course completion
- Difficulty managing multiple courses
- Time-consuming reporting

CRM Use Cases:

- Employees can register online for courses
- HR can monitor employee participation
- Management can analyze departmental training
- Notifications for upcoming sessions or new courses

Outcome: A centralized system to improve efficiency, accuracy, and visibility in employee training programs.

5. AppExchange Exploration

Existing CRM and learning management solutions were studied for inspiration:

- Many apps track employees, courses, and certifications

- Some include online content and quizzes

- Common gaps: complex setup, high cost, lack of a simple dashboard

Opportunity: Our CRM focuses on being lightweight, easy to deploy, and cost-effective, while covering core functionalities like employee/course management and registrations.