

Employee Leave Management System – Salesforce Project Proposal

Problem Statement

In many small and medium-sized organizations, leave requests are still handled through emails, spreadsheets, or verbal communication. This manual approach often leads to:

- Miscommunication between employees, managers, and HR.
- Delays in leave approvals.
- Lack of visibility into leave balances and team availability.
- Difficulty in generating accurate reports for workforce planning.

There is a need for a **centralized, automated, and user-friendly Leave Management System** built on Salesforce that allows employees to apply for leave, managers to approve or reject requests, and HR to track balances and generate reports seamlessly.

1. Problem Understanding & Industry Analysis

In most small and medium-sized organizations, applying for leave is still a manual process. Employees usually send emails, fill out spreadsheets, or rely on verbal approvals. While this may work in very small teams, it often creates confusion as the company grows.

- Employees don't always know their exact leave balance.
- Managers find it difficult to track who is available and who is not.
- HR spends a lot of time reconciling records instead of focusing on strategic work.

Across industries like IT, education, and healthcare, workforce management is becoming a top priority. Companies are moving toward digital solutions to streamline attendance, payroll, and leave tracking. Salesforce offers the flexibility to build a simple, customized application that addresses these needs without investing in expensive third-party tools.

2. Requirement Gathering

To solve this, we propose a Salesforce-based Leave Management App with the following needs in mind:

What it should do (Functional Needs):

- Allow employees to easily apply for leave through a simple form.
- Route leave requests automatically to the right manager for approval.
- Keep a real-time record of available leave balances.
- Provide reports and dashboards to HR and management for better decision-making.

What it should be like (Non-Functional Needs):

- User-friendly so even first-time Salesforce users can use it comfortably.
- Work on both desktop and mobile, since employees may apply on the go.
- Secure with different roles for employees, managers, and HR.
- Flexible enough to add new leave types or adapt to changing policies.

3. Stakeholder Analysis

- **Employees:** Want an easy way to request and track their leaves.
- **Managers:** Need quick approval tools and visibility into their team's availability.
- **HR/Admin:** Should be able to define policies, maintain records, and generate reports.
- **Executives:** Expect a bird's-eye view of workforce availability to plan resources better.

4. Business Process Mapping

The flow is simple and mirrors a real-world leave process:

1. An employee submits a leave request.
2. The system automatically forwards it to the reporting manager.
3. The manager reviews and either approves or rejects it.
4. Once approved, the system updates the employee's leave balance.
5. HR keeps an eye on overall leave trends through dashboards.
6. Notifications keep everyone updated at each step, reducing confusion.

5. Industry-Specific Use Cases

This solution can fit into different sectors with small tweaks:

- **IT Companies:** Helps avoid resource crunch during critical project deliveries.
- **Educational Institutions:** Ensures faculty availability during key academic periods.
- **Hospitals/Clinics:** Makes sure critical staff like doctors and nurses don't overlap in their leaves.
- **Startups/SMEs:** Provides a lightweight alternative to costly HR management systems.

6. AppExchange Exploration

Salesforce's AppExchange does have leave management tools available, but many of them are either paid or built with a lot of features that smaller companies don't need. By creating our own custom application, we can:

- Keep it simple and focused only on what the organization requires.
- Save money by avoiding heavy licensing fees.
- Maintain the flexibility to expand the app in the future if the company grows.