

Phase 1: Problem Understanding and Industry Analysis

1. Requirement Gathering

The requirements are divided into three categories:

- **Functional Requirements:**

- Employees can submit leave requests (type, duration, reason).
- Employees can view their leave balance and leave history.
- Managers can approve/reject leave requests with comments.
- Team leave calendar for managers to check overlapping leaves.
- HR can define leave policies (entitlements, carry forward, encashment rules).
- HR can generate reports on leave usage, trends, and compliance.
- System sends automated notifications and reminders.

- **Non-Functional Requirements:**

- Mobile-friendly interface for employees and managers.
- Role-based access control (Employees, Managers, HR, Admin).
- Scalability to handle growing workforce.
- Integration with Payroll/Attendance systems.

- **Reporting Requirements:**

- Leave usage by employee, department, or period.
- Trend analysis (sick leaves, absenteeism).
- Pending leave approvals.

2. Stakeholder Analysis

- **Employees** (apply for leave, check balances, track status).
- **Managers** (approve/reject leave, monitor team availability).
- **HR Team** (set leave policies, track compliance, generate reports).
- **Executives** (analyze absenteeism, plan workforce).
- **System Admins** (configure Salesforce app, manage customization).

3. Business Process Mapping

Step-by-step Workflow:

1. **Employee Submits Request** → Select leave type, dates, reason.
2. **System Validates** → Checks leave balance, policy compliance.

3. **Manager Approval Workflow** → Manager reviews and approves/rejects.
4. **Notifications Triggered** → Employee notified; HR updated.
5. **Leave Balance Updates** → Automatically deducts approved leave.
6. **Reporting & Payroll Integration** → HR pulls reports and aligns with payroll.

4. Industry-Specific Use Case Analysis

- **IT Services / Consulting:** Project managers need visibility into resource availability for client delivery timelines.
- **Healthcare:** Staffing schedules must ensure minimum workforce coverage, especially during critical shifts.
- **Manufacturing:** Shift supervisors need leave data to maintain production line continuity.
- **Retail:** Store managers need leave tracking to avoid understaffing during peak sales seasons.
- **Education:** Academic institutions require structured leave policies for faculty and staff to avoid academic disruptions.

The Salesforce-based leave tracking app ensures adaptability across industries by allowing configurable policies, custom workflows, and role-based access.

5. AppExchange Exploration

Before building from scratch, exploring **Salesforce AppExchange** provides insights into existing solutions and accelerators:

- **Existing Leave Management Apps:**
 - *Leave Management System (LMS)* – Basic leave request/approval flow.
 - *HRMS Solutions* – Broader HR apps with leave as one module.
 - *Attendance & Absence Trackers* – Focus on time/attendance integrations.
- **Key Learnings from Exploration:**
 - Most apps provide **standard workflows**, but lack **deep customization** for industry-specific policies.
 - Integration with existing Salesforce objects (Users, HR data) is often limited.
 - Many charge additional licensing costs, making a custom solution more cost-effective.
- **Decision:** Build a **custom Leave Tracking App on Salesforce CRM** with flexibility, while keeping AppExchange apps in mind for potential integrations (e.g., payroll, attendance).