

Phase 1: Problem Understanding & Industry Analysis

Title :- Employee Onboarding and Training Tracker using Salesforce CRM

1. The Core Problem

Organizations face significant challenges in managing employee onboarding and training using manual processes such as spreadsheets, emails, and paper-based checklists. This creates:

Delays in onboarding – new hires wait longer to complete required steps.

- Lack of visibility – HR and managers cannot easily track which tasks are pending or completed.
- Inconsistent training delivery – employees often miss modules or receive incomplete guidance.
- Compliance risks – important steps may be overlooked, leading to regulatory or policy violations.

The result is reduced employee productivity, poor engagement, and inefficiency in HR operations.

2. Why Salesforce?

Salesforce provides a centralized and automated solution to streamline onboarding and training:

All-in-one system – Employee details, tasks, and training records are stored in one place.

- Automation – Onboarding checklists, training assignments, and reminders are automatically triggered.
- Personalization – Each employee has a 360° profile with onboarding progress and learning paths.
- Dashboards – HR and managers can track onboarding completion, training status, and deadlines in real time.
- Integrations – Connects with email/SMS for reminders and Learning Management Systems (LMS) for training updates.

3. Stakeholders and Their Needs

Stakeholder	Their Challenge	What Salesforce Delivers
New Employees	Confusion about tasks and required training	Self-service portal with checklist and notifications
HR Managers	Manual tracking and follow-ups	Automated workflows and dashboards for task progress
Team Leads / Managers	Lack of visibility into employee readiness	Reports on training completion and onboarding status
Administrators	Compliance and audit risks	Centralized system with real-time reporting

4. Key Results We Want to Improve

Current onboarding processes often result in:

- Delays in completing onboarding tasks.
- Low training completion rates.
- Higher employee frustration and disengagement.
- Compliance gaps due to missed steps.

With Salesforce, the goal is to:

- Achieve 100% completion of mandatory onboarding tasks.
- Ensure 90%+ training module completion rates.

- Reduce onboarding cycle time by 30–40%.
- Provide real-time dashboards for HR and managers.

5. Industry Insights – What Others Have Achieved

Many companies have successfully implemented Salesforce for HR workflows: • Tech firms use Salesforce to streamline IT onboarding, reducing delays in system access.

- Financial institutions use it for compliance training tracking, achieving higher completion rates.
 - Global enterprises integrate Salesforce with LMS, making HR processes 25–30% more efficient.
- This demonstrates that Salesforce can bring measurable improvements in employee engagement and operational efficiency.

6. How the Process Works

Today's Reality (Manual + Reactive):

1. Employee joins → HR emails onboarding forms.
2. Training modules shared via links or spreadsheets.
3. Follow-ups done manually via email/phone.
4. No central dashboard to track progress.
5. Delays noticed only after deadlines are missed.

With Salesforce (Automated + Proactive):

1. Employee joins → onboarding tasks and training modules auto-assigned.
2. Automated reminders sent for pending steps.
3. Progress updated in real time on employee dashboards.
4. Managers/HR receive alerts for overdue or incomplete tasks.
5. Reports and analytics available anytime for compliance audits.

7. What We've Achieved in Phase 1

By the end of Phase 1, we have: • A clear problem statement outlining inefficiencies in onboarding and training.

- A mapped solution using Salesforce features (automation, dashboards, integrations).
- Defined key stakeholders and how their challenges are addressed.
- Target KPIs (completion rates, onboarding cycle time, compliance).
- Real-world industry insights showing Salesforce's impact.
- A before-and-after process flow highlighting transformation.