ERM Hybrid Workforce Project – Phase 1

Phase 1: Problem Understanding & Industry Analysis

Problem Statement:

Organizations today are adopting hybrid work models, where employees split their time between office, remote, or flexible locations. While hybrid work improves flexibility and employee satisfaction, it also creates challenges in managing workforce productivity, engagement, well-being, and compliance. Traditional HR and workforce management systems often fail to provide real-time visibility, actionable insights, and centralized tracking of employees' schedules, feedback, and performance

Goal:

The ERM platform is designed to **digitize and centralize employee engagement** for organizations with hybrid and remote workforces. It aims to:

- Enhance employee experience and retention
- Provide real-time visibility into workforce well-being and productivity
- Enable managers and HR to make data-driven decisions
- Streamline hybrid scheduling and employee feedback processes

This will be achieved by connecting **employees, managers, HR, and leadership** on a single Salesforce-powered platform.

1. Requirement Gathering

Engaged Stakeholders:

- Employees (hybrid/remote/in-office)
- Team Managers
- HR Managers
- Learning & Development Teams
- Senior Leadership (CXOs, Directors)
- IT & System Administrators

Example Requirements:

- Hybrid scheduling management (office vs. remote days).
- Employee feedback collection (real-time pulse surveys, sentiment analysis).
- Automated well-being alerts (burnout risk, workload imbalance).
- Performance reviews integrated with feedback history.
- Centralized knowledge base (policies, resources, onboarding materials).
- Dashboards for leadership (engagement trends, attrition risk, productivity).
- Automated notifications for upcoming 1:1 meetings, reviews, or surveys.
- Integration with third-party systems (Slack/Teams, HRMS, calendars).

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2. Stakeholder Analysis

- **Platform Administrator**: Manages configurations, system rules, and integrations.
- **Employee**: Primary user, manages schedules, provides feedback, accesses resources.
- **Team Manager**: Reviews schedules, monitors team morale, resolve issues early.
- **HR Manager**: Tracks organization-wide engagement and designs initiatives.
- **Learning & Development**: Identifies skill gaps, recommends resources.
- **Senior Leadership:** Uses analytics for workforce planning and retention strategies.

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3. Business Process Mapping

Employee Engagement & Feedback Flow:

1. HR Manager sets up periodic pulse surveys in the system.
2. Employees provide real-time feedback (mobile/desktop).
3. System runs sentiment analysis → negative trends trigger alerts.
4. Team Manager reviews feedback and schedules 1:1 meetings.
5. Leadership views engagement dashboards for strategic actions.

Hybrid Scheduling & Productivity Flow:

1. Employee logs in and updates work preference (remote/office days).
2. Team Manager gets a consolidated team view for planning meetings.
3. HR tracks office occupancy trends and generates reports.
4. Employees receive automated reminders (meeting schedule, office visit).
5. Data feeds into analytics dashboards for workforce optimization.

4. Industry-Specific Use Case Analysis

- **Shift to Hybrid Models:** Post-pandemic, companies must balance flexibility and collaboration.
- **Employee Retention Crisis:** Disengaged employees = high attrition = costly hiring cycles.
- **Fragmented Tools:** Surveys on Google Forms, schedules in Excel, resources on SharePoint → leads to inefficiency.
- **Cultural Challenges:** Remote staff often feel disconnected, impacting morale and productivity.

5. App Exchange Exploration

Existing Platforms:

- Workday, Success Factors, Office Vibe.

Strengths: Advanced analytics, HR integrations, engagement features.
Limitations:

- Expensive for mid-size companies.
- Overly complex for small-to-medium enterprises (SMEs).
- Limited personalization for hybrid scheduling.

ERM Opportunity:

- Salesforce-native, integrated with existing CRM/Service Cloud.
- End-to-end focus on **employee lifecycle** + **hybrid engagement**.
- Affordable and configurable for SMEs.
- Mobile-first, with offline and multi-language support.

6. Gap Analysis (Existing vs. Proposed)

Existing Systems:

- Expensive, often HR-only focus.
- Lack of hybrid scheduling functionality.
- Poor real-time feedback loops.

ERM on Salesforce:

- Affordable, scalable, and configurable.
- Hybrid scheduling + employee engagement in one platform.
- Real-time feedback + sentiment analysis dashboards.
- Unified data model → no silos between HR, managers, and leadership.

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7. Technology Landscape & Tools

Platform: Salesforce CRM

Modules & Features:

- **Lightning Experience** : Employee & Manager UI, Scheduler, Dashboards
- **Experience Cloud:** Employee portal, HR knowledge base, mobile access
- **Service Cloud** : Ticketing for HR queries, workflow automation
- **Tableau CRM** : Employee engagement analytics, trend reporting
- **Salesforce Flow & Process Builder:** Automated feedback routing, approval processes
- **Einstein AI** : Sentiment analysis, predictive insights on engagement & burnout

Integrations:

- Email, Slack, MS Teams, Calendar
- Optional HRIS or payroll systems

Design:

- Mobile-first design, responsive UI.
- Multi-language support for global teams.
- Offline sync for employees in low-connectivity areas.

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8. Risks & Mitigation

- **Employee Resistance** : Gamify surveys, ensure anonymity, keep UI simple.
- **Data Privacy** : Role-based access, compliance with GDPR/HR policies.
- **Manager Overload:** Automated dashboards instead of manual analysis.
- **Low Adoption** : Mobile-first, Slack/Teams integration, user-friendly design.

9. Success Metrics

- Employee adoption rate (% using the platform weekly).
- Employee satisfaction/engagement score improvement.
- Retention improvement % (reduced attrition).
- Office occupancy optimization (better space planning).
- Reduced survey cycle time (from annual → real-time).

10. Future Vision

- **AI-based attrition prediction models** (proactively identify at-risk employees).
- **Gamified feedback mechanisms** (rewards for participation).
- **Well-being analytics** (workload balance, burnout prediction).
- **Integration with Learning platforms** (recommend skill development courses).
- **Scalable model:** Pilot with one business unit → roll out company-wide → extend to global operations.

Phase 1 Completion Document.