ERM Hybrid Workforce Project – Phase 10

<u>Final</u> <u>Phase</u> <u>10</u>: <u>Final</u> <u>Presentation</u> & <u>Demo</u> <u>Day</u>.

Project Title: ERM for Hybrid Workforce – Employee Relationship Management
Phase: 10 – Final Documentation & Presentation
Date: 27 September 2025
Prepared By: Rv Balaji Sai

1. Executive Summary

The ERM for Hybrid Workforce is a Salesforce-based Employee Relationship Management platform designed to streamline hybrid work operations, improve employee engagement, and enhance organizational productivity.

The system connects employees, managers, HR, and leadership to manage schedules, well-being, performance metrics, and organizational analytics. Over 10 structured phases, the project addressed real-world workforce challenges, built scalable Salesforce solutions, and delivered end-to-end features ranging from data modeling and automation to reporting, dashboards, and security compliance.

2. Problem Statement

Organizations managing hybrid workforces face several challenges:

- Difficulty in tracking employee attendance, schedules, and productivity.
- Limited visibility into employee well-being and engagement levels.
- Manual data collection leading to reporting inefficiencies and delayed decision-making.
- Managers and HR teams struggle to identify trends or address workforce concerns proactively.

3. Solution Overview

ERM for Hybrid Workforce provides:

- **Employee Empowerment:** Self-service dashboards, pulse surveys, and well-being alerts.
- **Manager Tools:** Analytics metrics, schedule tracking, and notifications for approvals and task assignments.
- **HR & Leadership Support:** Role-based dashboards, trend reporting, and actionable insights for workforce planning.
- **Automation:** Workflows, approval processes, and smart notifications to improve efficiency and engagement.

The platform leverages Salesforce CRM features, custom objects, Apex, Lightning Web Components (LWCs), flows, and integrations to deliver a secure and scalable solution.

4. Project Phases & Deliverables

Phase 1: Problem Understanding & Requirements

- Collected business requirements, stakeholder inputs, and hybrid workforce challenges.
- Defined success metrics and a phased project roadmap.

Phase 2: Org Setup & Configuration

- Salesforce Org setup, GitHub DevOps, company profile, users, roles, and profiles.
- Configured security & sharing models (OWD, FLS, Permission Sets).

Phase 3: Data Modeling & Relationships

- Created custom objects: Hybrid Schedule, Pulse Survey, Well-being Alerts, Analytics Metric, Employee Status.
- Defined object relationships, page layouts, record types, and compact layouts.

Phase 4: Process Automation (Admin)

- Validation Rules to enforce data integrity.
- Workflow Rules for notifications and alerts.
- Process Builder and Flows for schedule updates, well-being alert automation, and metric calculations.
- Approval Processes for leave requests and task approvals.

Phase 5: Apex Development

- Triggers for status updates, metric calculations, and data validations.
- Apex classes for workforce analytics and business logic.
- Asynchronous Apex for batch updates and reporting automation.
- Test classes achieving 80%+ coverage.

Phase 6: Lightning Web Components (LWCs)

- Custom dashboards for employees, managers, and HR.
- Interactive components for pulse surveys, schedule tracking, and analytics metrics.
- Mobile-responsive design for remote workforce accessibility.

Phase 7: Integration

- External integrations for notifications, collaboration tools, and HR systems.
- Demonstrated Salesforce → External REST callouts using Apex.

Phase 8: Data Management & Deployment

- Imported employee, schedule, and survey data using Data Loader and Import Wizard.
- Deployment pipeline: Dev → Sandbox → Production via Change Sets.
- Backup strategy and error handling implemented.

Phase 9: Reporting & Dashboards

- Role-based dashboards:
    - Employees – attendance, well-being, tasks.
    - Managers – team metrics, engagement, schedules.
    - HR – organization metrics, pulse survey insights.
- Dynamic dashboards for secure analytics.

Phase 10: Final Presentation & Wrap-Up

- Consolidated documentation, reports, and final PPT presentation.
- System prepared for pilot testing across hybrid teams.

---

5. Security & Compliance

- **Data Security:** Role hierarchy, Field-Level Security (FLS), Organization-Wide Defaults (OWD).
- **Compliance:** GDPR, Indian data privacy policies, and internal security standards.
- **Audit Trail:** System logging, approval history, and change tracking.

6. Project Outcomes

- Employees receive real-time notifications and well-being alerts.
- Managers can monitor team schedules and engagement efficiently.
- HR and leadership gain actionable insights through analytics metrics and dashboards.
- Phase 10 completion achieved with a fully functional Salesforce org for hybrid workforce management.

7. Future Enhancements

- **AI Integration:** Predictive workforce analytics and attrition forecasting.
- **Advanced Notifications:** Automated multi-channel alerts for engagement.
- **IoT/Device Integration:** Attendance and well-being monitoring through smart devices.
- **Mobile App Extension:** Offline-first access for employees working remotely.

8. Conclusion

The ERM for Hybrid Workforce project successfully digitizes hybrid workforce operations using Salesforce CRM. Phased implementation ensured systematic delivery, automation, and scalability, making the system ready for real-world pilot adoption.

Final Status: Project Completed (Phase 1–10)
Deliverables: Source Code, Documentation, Reports, PPT

Final Phase Completion Document.