Phase 1: Problem Understanding & Industry Analysis Contact Training Tracker in Salesforce

Requirement Gathering

The project addresses the challenge of tracking training sessions attended by contacts and managing for Organizations often face inconsistent tracking, missed training schedules, and lack of insights into training Requirements include automated session logging, assignment of follow-up tasks, feedback collection.

Stakeholder Analysis

 Primary stakeholders are: -

Contacts: who attend training sessions and provide feedback. - Training Coordinators: who schedule and manage training sessions. - Service Agents: who follow up with contacts post-training. - Managers: who monitor training effectiveness and team performance. - Business Owners: who require insights into training outcomes and resource utilization.

Business Process Mapping

 Current Process: Training sessions are manually tracked → Attendance recorded inconsistently → Follo Proposed Process with Salesforce: Training sessions scheduled via Salesforce → Attendance auto-log

Industry-specific Use Case Analysis

This project fits sectors where training is crucial for customer engagement, employee development, and Streamlined training management, structured feedback collection, and real-time reporting make it high.

AppExchange Exploration Potential

AppExchange tools include: - Training & Survey Tools (e.g., Salesforce Surveys, GetFeedback) for feedback collection. - Learning Management Enhancements for structured training content delivery. - Integration apps for notifications via email, SMS, or collaboration tools.

 For this capstone, we will primarily leverage core Salesforce functionalities with optional integrations.