

Streamlining Time Off Tracking at CBM Inc. with Salesforce

ORGANIZATION

CBM Inc., a mid-sized company, faced challenges in efficiently tracking employee time off and managing PTO requests. Based on spreadsheets, their previous system was prone to errors, lacked transparency, and created administrative overhead.

CHALLENGE

Before implementing the solution, CBM Inc. faced several operational challenges:

- **Manual Tracking:** Time-off requests were tracked in annual spreadsheets, which were easy to misplace and difficult to report on. Employees often had to email HR or managers for approval, resulting in delays and inconsistencies.
- **Lack of Oversight:** Management had limited visibility into time-off usage across the organization, making it difficult to plan for employee absences and avoid scheduling conflicts.
- **Error-Prone System:** Manual data entry and calculations led to errors, which caused frustration among employees and managers alike.
- **Increased Administrative Overhead:** HR spent considerable time manually managing time-off requests and ensuring accurate leave balances, which took valuable time away from more strategic tasks.

SOLUTION

CBM Inc. needed a solution that was cost-effective, efficient, and seamlessly integrated with their existing Salesforce platform. Instead of adopting an external third-party software solution with additional costs and administration, they partnered with XTIVIA to build a custom Time Off tracking system directly within Salesforce.

Key Features of the Solution:

- **Custom Objects:** Two custom objects were created in Salesforce to manage time off data: PTO Summary and PTO Request.
- **Approval Process:** Salesforce's built-in Approval Process was used to handle PTO requests, allowing managers to approve or deny requests with ease.
- **Automation:** Salesforce Flow Automations calculated PTO balances and updated employee records automatically when time off was taken or approved.
- **Reporting and Dashboards:** Real-time reports and dashboards were created to provide both employees and managers with up-to-date information about available and used PTO hours.

BENEFITS and VALUE PROPOSITION

1. **Cost Savings** - By leveraging Salesforce's existing platform, CBM Inc. avoided additional costs for third-party software. They also saved on administrative overhead, as the automation streamlined processes, reducing manual efforts by HR and managers.
2. **Enhanced Efficiency** - The automation of time-off requests and calculations significantly reduced manual tasks. HR personnel no longer needed to handle time-off requests via email or track leave balances manually, allowing them to focus on other strategic activities.
3. **Better Planning and Oversight** - Managers gained real-time visibility into employee time off, making it easier to plan for absences and avoid disruptions. The system also helped ensure that adequate coverage was maintained during peak times.
4. **Minimized Errors and Legal Risks** - The automated system reduced the risk of human error when calculating and tracking PTO balances, ensuring compliance with company policies and reducing the likelihood of legal issues related to leave management.
5. **Employee Satisfaction** - Since employees were already familiar with Salesforce, adopting the system was straightforward. They appreciated the transparency and ease of accessing their PTO balances, which fostered trust and improved morale.
6. **Consistency and Fairness** - The system applied company policies consistently across the organization, ensuring that time off was tracked and approved according to the same rules for everyone.
7. **Scalability** - The Salesforce-based system was easily scalable to accommodate the company's growth, and the platform's flexibility allowed for future adjustments as needed.

SUMMARY

CBM Inc.'s transition from an error-prone, manual time-off tracking system to an automated solution within Salesforce was a resounding success. The project was completed in under a week, saving the company valuable time and resources. By leveraging XTIVIA's expertise in Salesforce, CBM Inc. achieved a more efficient, transparent, and reliable system for managing employee time off. The implementation of this system resulted in significant cost savings, improved employee satisfaction, and better overall operational efficiency.

This case study showcases the power of using Salesforce's platform to solve business challenges without the need for additional software purchases, ultimately driving increased ROI for CBM Inc. through streamlined processes and enhanced decision-making capabilities.

ABOUT XTIVIA

XTIVIA is a proven technology integration and innovation company known for delivering leading-edge technology solutions to our client's specific requirements, regardless of project complexity. We bring next-level business operations to reality through Application Development, Business Intelligence, Data Warehousing, Database Support & Management, Enterprise Information Management, Digital Experience Solutions and Enterprise Resource Planning. Our success stems from a demonstrated ability to deliver deep expertise via professional services, empowering clients to leverage their chosen technology successfully, competitively, and profitably. XTIVIA has offices in Colorado, New York, New Jersey, Texas, Virginia and India.

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