



Transform Your Staffing Operations with Flexi Kanban

A Customizable Salesforce Kanban Solution



ISV
PARTNER





Introduction

In the competitive staffing industry, managing multiple job requirements and candidates efficiently is crucial to success. A leading staffing company faced challenges in optimizing communication between Account Managers and Delivery Managers, ensuring visibility across processes, and maintaining efficient workflows.





Business Challenge

The staffing company's Business Development teams, consisting of Account Managers and Delivery Managers, were responsible for filling job requirements from various clients.

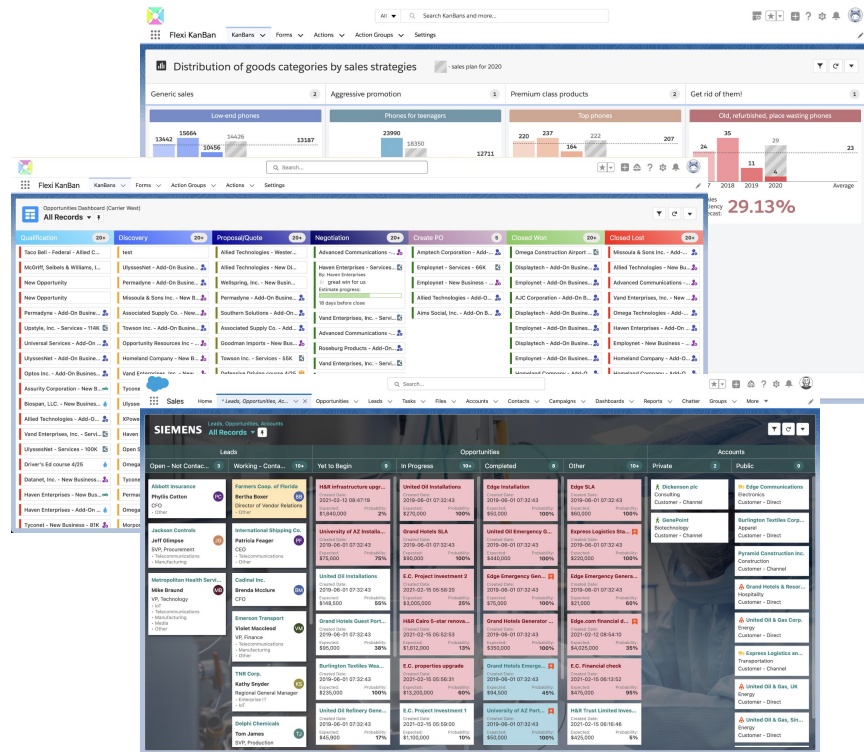
The key challenge was to ensure smooth communication and visibility across these teams, especially during daily meetings where they discussed critical job requirements.

Meet Flexi Kanban

Flexi Kanban is a powerful tool designed to build highly customizable Kanban boards within Salesforce.

Unlike Salesforce's standard Kanban view, Flexi Kanban allows users to configure and customize every element of their board, from positioning and visual styling to workflows and interactivity.

It is a 100% native Salesforce app, ensuring seamless integration with the existing Salesforce ecosystem.





Unique Features of Flexi Kanban

1

Removal of Salesforce Kanban Limits

Unlike Salesforce's standard Kanban view, which limits users to displaying only up to 4 fields per card and a maximum of 200 cards, Flexi Kanban removes these restrictions, allowing unlimited fields and cards.

2

Comprehensive Customization

Users can configure every element of the board, including element positioning, visual styling, mouse click handlers, and more.

3

Advanced Workflow Implementation

Flexi Kanban allows for the creation of complex workflows with configurable source and target columns, rules for moving cards, and actions executed when cards are moved.

4

Enhanced Visualization and Interaction

The tool supports dynamic field labels, color coding, column-specific layouts, and custom elements in the Kanban board headers and footers.



Proposed solution

The staffing company implemented Flexi Kanban to manage their job requirements and applicant tracking processes. The solution involved setting up two custom objects within Salesforce: "Jobs" and "Subs & Applicants."

These objects were visualized on the Kanban board, representing two interrelated business processes.



1. Job Requirement Process



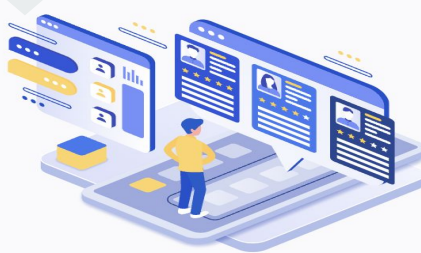
Card Management

Cards were created automatically when new "Staffing Job" or "Staffing Job Applicant" records were added. These cards were color-coded by Account Manager and grouped by stage.



Stages

The Job Requirement process was visualized across 10 columns: Job Requirement, Submission, Interview, Feedback, Offer Out, Pending Start, Fill, Wash, Loss, and Quarterly Starts.



Automated Status Updates

Cards moved across columns, automatically updating job statuses in Salesforce. For example, a card in the Fill column marked the job as "Placed," while a card in the Wash column marked it as "Wash."



2. Submission Process

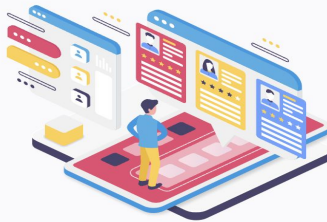


Color Coding and Grouping

Cards were color-coded by Recruiter and grouped by Job #. The board provided real-time visual cues, with cards turning yellow or red based on the duration they remained in specific stages.

Stages

Submission cards moved through Submission, Interview, Feedback, Offer Out, Pending Start, and Quarterly Starts columns.





Results

Flexi Kanban transformed the staffing company's operations by providing a highly customizable and visually intuitive tool for managing job requirements and applicants.

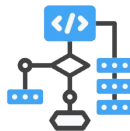
The implementation of Flexi Kanban brought several key benefits to the staffing company:

Improved Visibility



The Kanban board provided a real-time, visual representation of job and applicant statuses, enhancing visibility and communication between Account Managers and Delivery Managers.

Efficient Workflow Management



By automating status updates and color-coding based on time elapsed, the company could focus on critical tasks and ensure timely placements.

Seamless Salesforce Integration



Being a native Salesforce app, Flexi Kanban integrated seamlessly with the company's existing processes, requiring minimal disruption during implementation.



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Thank you.

Try it out today and experience the difference for yourself!

