Ideation Phase

Define the Problem Statements

Date	01 November 2025
Team ID	NM2025TMID04457
Project Name	Medical Inventory Management

Customer Problem Statement:

Healthcare institutions often face challenges in managing their medical inventories efficiently. Manual record-keeping and lack of automated alerts lead to frequent stock imbalances, expired medicines remaining in storage, and difficulty in tracking supplier transactions.

These issues result in **delayed restocking**, **inaccurate reporting**, and **potential health risks** due to expired or unavailable medicines. Staff members struggle to maintain real-time updates on inventory movement, leading to poor decision-making and disrupted healthcare operations.

A Salesforce-based **Medical Inventory Management System** is required to automate these processes — allowing administrators to track stock, manage suppliers, monitor expiry dates, and receive reorder alerts. This will improve **accuracy, visibility, and operational reliability** in medical supply chain management.

Reference:
https://miro.com/templates/customer-problem-statement/

Problem & Solution Table

Problem	Description	Solution
Stock Inaccuracy	Manual updates lead to incorrect stock counts, causing shortages or overstocking.	Automate stock updates using Salesforce Flows when purchase or sales records are modified.
Expired Medicines	Lack of expiry tracking may lead to selling or storing expired products.	Implement validation rules and scheduled alerts for approaching expiry dates.
Supplier Mismanagement	Difficulty in tracking supplier history, performance, and contact details.	Maintain a dedicated Supplier object with linked Purchase Orders and performance dashboards.
Data Fragmentation	Inventory, suppliers, and orders stored in separate systems reduce visibility.	Integrate all records under a unified Salesforce App with related lists and object relationships.
Limited Insights	Admins lack real-time visibility on sales, inventory, and supplier performance.	Create dashboards and reports for real-time insights and data-driven decisions.

Example:

Problem Statement (PS)	I am	I'm trying to	But	Because	Which makes me feel
PS-1	A Hospital Administrator	Track medicine stock levels	the records are often outdated	there is no automated stock update or expiry alert	frustrated and anxious about stock shortages
PS-2	A Pharmacist	Sell or issue medicines	the system doesn't show expiry status clearly	expired medicines may be dispensed unknowingly	worried and dissatisfied
PS-3	A Purchase Manager	Reorder supplies efficiently	there's no alert when stock falls below threshold	I have to manually check levels every time	overwhelmed and time-constrained

Problem Statement PS 1:

As a **hospital administrator**, I am trying to monitor and manage the stock of medicines and equipment efficiently, but the manual system makes this difficult because it lacks **real-time tracking and expiry notifications**.
This results in **frequent shortages** or **use of expired stock**, impacting hospital operations.
I need a **centralized Salesforce system** that automatically updates stock levels, sends expiry alerts, and generates accurate reports.

Problem Statement PS 2:

As a **pharmacist**, I want to ensure that every medicine issued is valid and within its expiry date. However, the current manual check process is prone to oversight.
This causes errors, risking **patient safety** and **inventory losses**.
An automated **validation rule** within Salesforce can prevent the sale of expired medicines and enhance trust and compliance in medical processes.

Problem Statement PS 3:

As a **purchase manager**, I need timely alerts when stock levels reach reorder points. Currently, I depend on manual logs and irregular updates from the team.
This delays **purchase decisions** and may cause stockouts.
A Salesforce **Flow automation** and **report dashboard** can provide instant reorder alerts and maintain continuous supply availability.