**Customer Journey Map**

**Introduction**

Understanding the end-user’s journey through the inventory management process is crucial to designing a solution that truly meets their needs. The **Customer Journey Map** outlines the step-by-step experience of the primary user — in this case, the **Hospital Inventory Manager** — as they interact with the current and future system. This approach helps identify pain points, opportunities for automation, and areas where Salesforce can enhance efficiency.

Our journey mapping focused on the **inventory lifecycle**, from stock monitoring to restocking and reporting, and compared **before and after** implementation scenarios.

**Persona: Hospital Inventory Manager**

| **Name** | **Ravi Sharma** |
| --- | --- |
| **Role** | Inventory Manager at a Multispecialty Hospital |
| **Experience** | 7 years in medical procurement and inventory |
| **Goals** | Avoid stockouts, minimize wastage, ensure audit readiness |
| **Pain Points** | Manual processes, delayed restocking, expiry tracking |

**Phases of the Inventory Management Journey**

| **Stage** | **Description** |
| --- | --- |
| **1. Stock Monitoring** | Daily review of stock levels in departments |
| **2. Shortage Detection** | Identifying low stock or near-expiry items |
| **3. Procurement** | Requesting approval and placing orders with vendors |
| **4. Stock Receiving** | Verifying delivery, updating records, and notifying departments |
| **5. Reporting** | Generating monthly usage, wastage, and audit reports |

**Customer Journey Map – Current vs. Future State (with Salesforce)**

| **Stage** | **Current System Experience** | **With Salesforce Solution** |
| --- | --- | --- |
| **1. Stock Monitoring** | Uses Excel sheets or paper logs to manually record stock from various departments. | Live dashboards show real-time stock levels with color-coded thresholds (green/yellow/red). |
| **2. Shortage Detection** | Notices shortages only after requests from departments or last-minute checks. No system alerts. | Automated alerts notify the user when any item is below threshold or near expiry, enabling proactive restocking. |
| **3. Procurement** | Fills out manual requisition forms and waits for approval via email/printout. Delays are common. | Salesforce Flow automates the requisition-approval process with role-based actions and mobile approval capability. |
| **4. Stock Receiving** | Updates paper records or spreadsheets manually after checking received items. Often forgets to update all logs. | Barcode-based check-in updates stock instantly in Salesforce. Vendor records auto-update for future analysis. |
| **5. Reporting** | Prepares Excel reports manually. Difficult to extract historical trends or expiry summaries. | Uses built-in Salesforce reports & dashboards to generate usage, cost, expiry, and audit data instantly. |

**Detailed Journey with Emotions, Actions, and Touchpoints**

| **Stage** | **Action** | **Touchpoints** | **Emotions** | **Opportunities** |
| --- | --- | --- | --- | --- |
| **Stock Monitoring** | Checks stock manually in pharmacy & stores. | Stock sheets, verbal updates | Tired, uncertain | Real-time stock dashboard with drill-down by location. |
| **Shortage Detection** | Informed late about shortages. Items often run out. | Phone calls, complaints | Frustrated, reactive | Set automated threshold alerts via Salesforce. |
| **Procurement** | Sends emails or forms to procurement team. Waits long for approvals. | Emails, WhatsApp, printouts | Powerless, impatient | Auto-routing approval via Salesforce Flow & record updates. |
| **Stock Receiving** | Physically verifies shipment, logs details in spreadsheet. | Delivery notes, Excel | Stressed, time-pressed | Barcode-based check-in, automatic quantity update in system. |
| **Reporting** | Compiles multiple Excel sheets manually for audit. | Excel, Word, Pen notes | Overwhelmed | Salesforce Reports: usage history, expiry logs, cost tracking. |

**Visual Journey Mapping (Textual Layout)**

**[Stock Monitoring] → [Shortage Detected] → [Procurement] → [Receiving] → [Reporting]**

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**Manual checklists No alerts, last minute Long approval wait Tedious updates Hours of reporting**

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**Real-time dashboard Auto email alerts Flow-based approvals Barcode check-in 1-click reports**

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**Insights from the Customer Journey**

* The **biggest friction** lies in manual approvals and delayed shortage detection.
* **Error-prone documentation** is another recurring theme due to Excel or paper logs.
* Salesforce can **automate 70-80%** of the current workload in procurement and reporting.
* Most frustrations are tied to **reactive operations**. We designed the system to shift toward **proactive, automated workflows**.

**Impact on Stakeholders Beyond the Inventory Manager**

| **Role** | **Positive Change from Improved Journey** |
| --- | --- |
| **Doctors/Nurses** | Fewer treatment delays due to item shortages |
| **Hospital Admin** | Better oversight through dashboards; easier budgeting and vendor negotiations |
| **Auditors/Inspectors** | Readily available logs and reports reduce compliance risks |
| **Vendors** | Standardized orders and faster payment cycles improve relationships |

**Conclusion**

The customer journey map offers a holistic view of the inventory process — both before and after the Salesforce implementation. It reveals how our solution directly addresses the emotional and operational pain points of the hospital inventory manager. The improvements touch every stage of the inventory lifecycle, ensuring smoother operations, better data accuracy, improved compliance, and a shift from manual to intelligent workflows.

This mapping laid the groundwork for the detailed **Functional** and **Non-Functional Requirements** outlined in the next sections.