PHASE 1 – PROBLEM UNDERSTANDING & INDUSTRY ANALYSIS

Pharmacy Delivery CRM Using Salesforce

1. INTRODUCTION

The Pharmacy Delivery CRM project aims to streamline and digitize the entire medicine delivery workflow using Salesforce.
This phase focuses on understanding the current industry challenges, identifying gaps in existing manual processes,
and defining the purpose, scope, and business need for the CRM system.

2. INDUSTRY OVERVIEW

The pharmacy delivery sector has grown significantly due to rising demand for convenient access to medicines.
Chronic care patients, elderly individuals, and remote populations rely heavily on medicine delivery services.
Pharmacies must manage timely deliveries while tracking stock, agents, and customer communication.

Key industry trends include:
• Increased reliance on home delivery
• Shift toward digital health management
• Need for automated updates and tracking
• High expectations for transparency and speed

3. INDUSTRY CHALLENGES

The traditional manual pharmacy delivery system suffers from several limitations:

• No real-time delivery status
• Manual logs causing errors
• Delays due to unassigned or lost deliveries
• No automated communication to patients
• Difficulty in tracking delivery agents
• Lack of analytics for performance review

4. BUSINESS PROBLEM

Pharmacies lack a unified platform to manage patients, medicines, delivery agents, and delivery logs.
Phone-based coordination leads to delays, miscommunication, and customer dissatisfaction.

Key problems identified:
• Manual task handling
• Tracking inefficiencies
• No transparency for patients

• Inability to measure agent performance
• No automated workflow

5. PROJECT OBJECTIVES

The objectives of the Pharmacy Delivery CRM are:

• Build a centralized digital platform
• Automate delivery notifications
• Track delivery status in real-time
• Provide dashboards and reports to management
• Improve communication between pharmacy and customers
• Reduce errors and improve delivery accuracy

6. STAKEHOLDER ANALYSIS

1. Pharmacy Administrator
- Creates deliveries
- Manages agents and patients

2. Delivery Agent
- Receives assignments
- Updates delivery status

3. Patient
- Receives medicines and notifications

4. Pharmacy Owner
- Monitors business performance
- Reviews analytics

7. EXISTING SYSTEM VS PROPOSED SYSTEM

Existing System:

• Paper-based or Excel-based tracking
• Manual assignment of delivery agents
• No automated notifications
• No analytics or dashboards

Proposed Salesforce CRM System:

• Centralized cloud-based platform
• Automated email alerts
• Delivery tracking with auto-numbering
• Visual dashboards for monitoring
• Better communication and transparency

8. PROJECT SCOPE

In-Scope:
• Delivery creation and tracking
• Patient and pharmacy management
• Agent assignment
• Email notifications
• Dashboards and reports

Out-of-Scope (Phase 1):
• Payment gateway integration
• Real-time GPS tracking
• Mobile application

9. HIGH-LEVEL REQUIREMENTS

Functional Requirements:
• Manage deliveries
• Assign delivery agents
• Send email notifications
• Track status

Non-Functional Requirements:
• Secure
• Scalable
• Easy to use
• Cloud-based

10. HIGH-LEVEL ARCHITECTURE

The proposed architecture consists of:

• UI Layer – Lightning pages and app navigation
• Data Layer – Custom Objects (Delivery, Patient, Pharmacy, Agent)

• Automation Layer – Flows for emails and status updates
• Analytics Layer – Dashboards and reports

11. CONCLUSION

Phase 1 establishes a thorough understanding of the pharmacy delivery ecosystem and highlights the need for
a Salesforce-based CRM solution that improves operational efficiency, communication, and tracking.

This provides the foundation for Phase 2, where the Salesforce org will be configured and data models created.