Phase 1 :- Problem Understanding & Industry Analysis

Title :- Dairy Management System Private Limited Using Salesforce CRM

The Core Problem

Dairy farmers and distributors often face challenges in managing milk production, inventory, orders, and distribution using **manual processes** like spreadsheets, phone calls, or paper records. This leads to:

- **Delays in the Orders** - Distributors and customers wait longer period of time for the deliveries of the milk products.
- **Lack of Visibility** – Farmers, Distributors, and Admins cannot track production, inventory, or orders in the real time.
- **Inconsistent Inventory Tracking -** Milk and Dairy products may be understocked, overstocked, or wasted.
- **Missed Promotional Opportunities** – Seasonal/festival offers are difficult to plan and track manually.

Impact :- Reduced productivity, lower farmer income, poor customer satisfaction, and operational inefficiency.

Why Salesforce?

Salesforce provides a centralized, automated solution for dairy management:

- **All-in-one system** -Stores cattle, milk production, inventory, orders, and festival offeres in a single platform.
- **Automation:** Auto-assigns tasks like milk collection, order processing, inventory updates, and notifications.
- **Personalization:** Farmers, distributors, and customers have dashboards showing production, order status, and offers.
- **Dashboards & Reports:** Real-time monitoring of milk collection, inventory levels, order fulfillment, and promotional campaigns.
- **Integrations:** Connects with **email/SMS** for order and offer notifications, and **payment gateways** for online orders.

Stakeholders & Their Needs

Stakeholder	Challenge	Salesfoce Solution
Farmer	Track milk production, inventory, and orders	Dashboard showing milk collection, inventory, and pending orders
Distributor	Receive and track milk deliveries	Automated order assignment and notifications
Customers	Know product availability & seasonal offers	Self-service portal with order tracking, payments, and festival offers
Admins/Managers	Compliance, reporting, and promotional planning	Centralized dashboards and analytics for inventory, orders, and campaigns

Key results to improve

Current dairy management issues:

- Delays in collecting and distributing milk

- Stock discrepancies and wastage

- Missed opportunities for festival offers and customer engagement

- Poor visibility of operations for managers

Salesforce Goals:

- **100% accurate inventory tracking** of milk and dairy products

- **On-time order fulfillment** for distributors and customers

- **Automated festival offer campaigns** for higher sales

- **Real-time dashboards** for farmers, distributors, and admins

- **30–40% reduction** in manual workload and delays

Industry Insights

Companies using **CRM for dairy and FMCG operations** report:

- Better **inventory and order management**, reducing spoilage and delays.

- Improved **customer engagement** through promotions and timely updates.

- Automated tracking of supply chains improves **operational efficiency** by 25–30%.

Conclusion: Salesforce enables measurable improvements in **productivity, revenue, and customer satisfaction** for dairy businesses.

Process Comparison: Today vs. Salesforce

Manual + Reactive (Current):

- Farmers manually record milk collection.

- Inventory is tracked via spreadsheets.

- Distributors/customers place orders via phone or WhatsApp.

- Festival offers are communicated manually, often missed.

- Managers realize issues only after delays or stock shortages.

Automated + Proactive (Salesforce):

- Farmers log milk collection → inventory auto-updated.

- Orders from distributors/customers auto-assigned.

- Automated notifications and reminders for deliveries.

- Festival offers auto-sent to customers via email/SMS with order links.

- Dashboards provide **real-time insights** into production, inventory, orders, and promotions.

Achievements of Phase 1

By the end of Phase 1, the project has:

- Defined a **clear problem statement** for dairy production, inventory, orders, and festival promotions.

- Mapped **Salesforce solutions** using automation, dashboards, and integrations.

- Identified **key stakeholders** and their challenges.

- Set **target KPIs:** inventory accuracy, on-time delivery, order fulfillment, and promotional effectiveness.

- Provided **industry insights** demonstrating Salesforce's impact.

- Illustrated a **before-and-after process flow** showing transformation from manual to automated operations.