Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

The first step is to clearly identify the business challenges and desired outcomes. For a *Medical Inventory Management System*, this means collecting inputs from healthcare staff, suppliers, and administrators about:

- Current pain points in tracking product stock, expiry, and reordering.

- Manual processes that cause inefficiencies or errors.

- Specific compliance or regulatory requirements in the medical industry. The output is a **requirement document** that captures functional needs (inventory, suppliers, purchase orders) and non-functional needs (security, automation, scalability).

2. Stakeholder Analysis

- **Primary stakeholders**: Inventory managers, purchasing managers, suppliers.

- **Secondary stakeholders**: Hospital staff, patients (indirect benefit via timely availability of medicines), management board.

- **Technical stakeholders**: Salesforce admins, developers, IT support team.
   This analysis ensures the system aligns with both business goals and end-user usability.

3. Business Process Mapping

Map the "as-is" process (current workflows) and the "to-be" process (optimized workflows using Salesforce).
 Example:

- **As-is**: Manual purchase orders tracked in Excel, supplier follow-ups via email/phone, limited visibility on stock shortages.

- **To-be**: Automated purchase order creation, supplier management in Salesforce, real-time dashboards to monitor inventory levels.
 This visualization makes it easier to identify inefficiencies and design improvements.

4. Industry-specific Use Case Analysis

- Tracking medicine expiry dates and lot numbers.

- Handling stock of medical devices and consumables.

- Ensuring audit trails for procurement and distribution.

- Supporting decision-making through reports (e.g., which supplier is most reliable, what products are nearing stock-out).
 This step tailors the generic CRM capabilities of Salesforce into a healthcare-specific solution.

5. AppExchange Exploration

Salesforce AppExchange offers pre-built solutions and accelerators that can save development time.
 For this project, exploration may include:

- Inventory management packages.

- Healthcare-specific CRM add-ons.

- Pre-built dashboards or workflow automation templates.
   This exploration helps decide whether to build from scratch, extend existing solutions, or use a hybrid approach.