Smart Food Bank & Donation Distribution CRM

PHASE 1 — Requirement Gathering & Research

1. Requirement Gathering

Goal: Build a Salesforce-first, scalable platform to centralize donation intake, automate matching & volunteer assignment, track delivery lifecycle (pickup → drop-off), and provide transparent impact reporting to donors, NGOs and operational teams.

Primary success metrics (SMART):
• Increase successful redistribution of food donations by 40% in 6 months.
• Reduce average pickup-to-delivery time for perishable items to ≤ 6 hours.
• Achieve ≥ 80% volunteer shift fulfillment via automation.
• Provide donors with ≥ 95% on-time SMS/email confirmations.

Objectives:
• Replace ad-hoc spreadsheets/WhatsApp flows with a single system of record.
• Automate matching to reduce manual coordination and reduce food wastage.
• Enable mobile-first volunteer workflows (QR scan check-in/out).
• Provide dashboards for operations, donors, and management.

2. Stakeholder Analysis

- Donors (Restaurants, Supermarkets, Households) — quick intake, scheduling, receipts, visibility.

- Recipient NGOs / Community Centers — accurate lead times, delivery scheduling, capacity reporting.

- Volunteers / Drivers — mobile tasks list, QR check-in/out, navigation instructions.

- Coordinators / Admins — manual override, SLA monitor, compliance & audit trails.

- Finance — donation valuation, receipts, reconciliation.

3. Business Process Mapping

Current (ad-hoc):
Donor contacts coordinator (calls/WhatsApp) → coordinator records in spreadsheet → assigns volunteer manually → pickup/delivery → spreadsheet updated.
Problems: No SLA enforcement, no geospatial matching, delayed pickups, and limited donor feedback.

Proposed (Salesforce-enabled):
1. Donor Portal: Donor creates Donation record (photos, expiry, quantity, pickup window).
2. Auto-Matching Flow: Salesforce Flow/Apex runs scoring (proximity, expiry urgency, NGO capacity).
3. Volunteer Assignment: Flow assigns available volunteers; Twilio SMS sent.
4. Mobile LWC QR Check: Volunteer scans QR at pickup & drop; Delivery_Task updates, hours logged.
5. Feedback & Reporting: Recipient submits feedback; donor receives receipt/impact summary; dashboards update.

4. Industry-Specific Use Case Analysis

• Perishable Matching: Prioritize donations nearer to expiry.
• Batching Pickups: Combine nearby donor pickups.
• Emergency Requests: NGOs push urgent requests; system escalates.
• Volunteer Swap: Volunteers request shift swaps via portal.
• Compliance: Log photos, temperature notes, chain-of-custody info.

5. AppExchange & 3rd-party Tools (recommended)

• Twilio — SMS notifications, confirmations.
• Google Maps / Mapbox — geocoding, proximity search, routing.
• QR libraries — LWC with JS QR library for scanning.
• Survey tools — Salesforce Surveys / AppExchange apps.
• Payment connectors — Stripe/Razorpay for monetary donations.
• Mapping Apps — Geopointe / MapAnything for visualizations.

Prepared by: AgentBlazer – Salesforce Admin/Developer/Instructor (10+ years)

Date: 2025-09-18