SALESFORCE PROJECT

MILKEASE

* **Phase 1 : Problem Understanding & Industry Analysis**
* Problem Understanding:-

Milk delivery businesses traditionally rely on manual methods such as registers, phone calls, or word-of-mouth to manage subscriptions. This creates multiple inefficiencies and customer dissatisfaction.

* Requirement Gathering :-
* Stakeholder Interviews :-
* Discussions with dairy business owners and managers.
* Feedback from delivery staff about current challenges.
* Customer Feedbacks :-
* Inputs from regular milk consumers regarding order flexibility and billing.
* Observation of Existing Systems :-
* Studying manual register-based and phone-call-based systems.
* Identifying inefficiencies in current workflows..
* Domain Research:-
* Studying how subscription-based delivery systems (like Swiggy Instamart, BigBasket subscriptions) handle dynamic orders..
* Regulatory & Business Needs:-
* Local tax compliance and digital payment integrations.
* Business need for performance insights and revenue tracking
* Stakeholder Analysis :-
* **Dairy Owner / Admin** (Manages overall business and system).
* **Delivery Staff** (Executes deliveries).
* **Customers** (End-users of milk subscription services).
* **System Administrator** (Maintains and supports the platform).
* **Payment Gateway Provider** (Enables online transactions).
* **Regulatory Authorities** (Indirect stakeholders (tax, compliance)).
* Business Process Mapping:-
* Customer Onboarding :-
* Customer registers on the platform → provides details (name, contact, address).
* Selects subscription plan (daily/weekly/monthly).
* Chooses preferred payment mode.
* Order & Subscription Management :-
* Customer sets default milk quantity.
* Customer can **modify orders** (extra milk, skip delivery, change address).
* System automatically updates subscription records.
* Delivery Planning:-
* System generates **daily delivery schedule** for each delivery staff.
* Route optimization ensures minimal travel and accurate quantities.
* Delivery staff receives updated list on their app/dashboard.
* Milk Delivery Execution :-
* Delivery staff delivers milk to customer.
* Marks order as **delivered / pending / skipped** in the system.
* Real-time status updates visible to both customer and admin.
* Billing & Payments :-
* System tracks all deliveries during the billing cycle.
* Auto-generates **monthly invoice** based on actual deliveries.
* Sends bill and payment reminders to customers.
* Customer pays via **cash/UPI/online**.
* Payment status updated in system.
* Performance Tracking & Analytics :-
* Dairy owner/admin monitors:
* Daily milk consumption & wastage.
* Route-wise delivery performance.
* Revenue & pending payments.

* System generates reports for business insights.

Customer Onboarding 🡺 Order & Subscription Management🡺 Delivery Planning🡺 Milk Delivery Execution🡺 Billing & Payments🡺 Performance Tracking & Analytics.

* **Industry-specific Use Case Analysis**:-
* **Customer Use Cases** :-
* View & Manage Subscription.
* Request Special Order.
* Update Delivery Address.
* View & Pay Bills.
* Provide Feedback.
* **Delivery Driver Use Cases** :-
* Access Daily Route.
* Confirm Delivery.
* Report Issue.
* **Admin/Business Owner Use Cases**:-
* Manage Subscriptions & Customers.
* Optimize Delivery Routes.
* Generate & Track Billing.
* Analyze Performance.
* **AppExchange Exploration**:-
* Customer Relationship Management (CRM)
* Subscription & Order Management
* Delivery & Logistics Management
* Payment Processing
* Analytics & Reporting