MediSupply CRM – Project Documentation

Phase 1: Problem Understanding & Industry Analysis

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1. Project Overview

Project Title: MediSupply CRM – Intelligent Medical Supply Chain & Inventory Management
Industry: Healthcare & Pharmaceutical Supply Chain
Project Type: B2B & B2C Salesforce CRM Implementation
Target Users:

- **Primary:** Pharmacies, Hospitals, Medical Suppliers
- **Secondary:** Distributors, Procurement Managers, Inventory Teams
- **Beneficiaries:** Patients & Healthcare Service Providers

2. Problem Statement

Healthcare organizations face **critical inefficiencies in their supply chain**. Stockouts result in patients not receiving timely medication, while expired drugs lead to compliance issues and financial losses. Supplier delays disrupt hospital operations, especially during emergencies. Currently, many pharmacies and hospitals rely on **manual methods like spreadsheets or paper records**, which lack real-time visibility. Suppliers struggle with **inaccurate forecasting** due to disconnected systems and delayed feedback loops.

To address these challenges, **MediSupply CRM on Salesforce** will serve as a centralized, intelligent platform to:

- Monitor inventory in real time.
- Automate expiry & stockout alerts.
- Track supplier performance against SLAs.
- Enable predictive demand forecasting.
- Provide dashboards for proactive decision-making.

3. Requirement Gathering

Requirements were identified by analyzing needs of **pharmacies, hospitals, and suppliers**.

Pharmacies:

- Reorder level alerts when medicine stock falls below threshold.
- Expiry tracking & proactive disposal notifications.
- Reports on high-demand medicines & slow-moving stock.

Hospitals:

- Bulk procurement workflows with approval processes.
- Emergency procurement request system with fast approvals.
- Supplier SLA monitoring (on-time delivery %, delay escalations).

Suppliers:

- Self-service portal (Experience Cloud) to receive & confirm orders.
- Demand forecasting dashboards for seasonal medicines.
- Invoice & payment tracking inside CRM.

4. Stakeholder Analysis

Internal Stakeholders:

- Procurement Officers → Manage hospital orders.
- Inventory Managers → Monitor pharmacy stock levels.
- Admin Staff → Execute manual entries & order requests.

External Stakeholders:

- Suppliers & Distributors → Provide medicines & medical devices.
- Logistics Partners → Manage transportation & delivery timelines.

End Beneficiaries:

- Patients → Ensure medicine availability without delay.

5. Business Process Mapping (Salesforce Org View)

Step 1: Supplier → Salesforce (Experience Cloud Portal)

- Updates stock availability.
- Publishes delivery timelines.

Step 2: Pharmacy/Hospital → Salesforce (Order Object / Opportunities)

- Creates purchase order request.
- Order moves through an approval workflow.

Step 3: Inventory Management (Custom Salesforce Object)

- Tracks quantity, expiry, batch numbers.
- Reorder thresholds configured.

Step 4: Automation & Monitoring

- **Stockout Alerts:** Triggered using Flow + Email Alerts.
- **Expiry Notifications:** Scheduled jobs send reminders.
- **SLA Escalations:** Supplier delays tracked as Cases.

Step 5: Analytics & Forecasting

- CRM Analytics provides real-time dashboards.
- Einstein Prediction Builder forecasts seasonal demands.

6. Industry-specific Use Cases

Use Case	Salesforce Implementation
Stockout Prevention	Inventory object + Flow-triggered alerts.

Use Case	Salesforce Implementation
Expiry Management	Custom fields for expiry dates + Scheduled Apex jobs.
Supplier SLA Tracking	Reports & Dashboards with KPI metrics.
Emergency Procurement	Fast-track Approval Process for urgent hospital orders.
Demand Forecasting	Einstein Analytics + Prediction Builder for seasonal spikes.

7. AppExchange Exploration

To strengthen MediSupply CRM, potential AppExchange apps were analyzed:

- **Rootstock Cloud ERP** → Robust supply chain, inventory & procurement integration.
- **ComplianceQuest** → Regulatory compliance & quality management for healthcare.
- **Health Cloud** → For hospital-centric patient and treatment workflows.
- **Salesforce Maps** → Optimize medicine delivery & logistics.
- **Accounting Seed** → Supplier invoice & payment management.

8. Key Insights from Phase 1

- Manual processes are the **biggest bottleneck** in healthcare supply chains.
- Expiry tracking & forecasting are **critical success factors**.
- A Salesforce-native solution with **custom inventory objects, automation, and AI forecasting** will solve most challenges.
- AppExchange provides **ready-made accelerators** that can reduce build effort.

✅ Phase 1 Deliverables

1. **Requirement Specification Document** – Captures needs of pharmacies, hospitals, suppliers.
2. **Stakeholder Map** – Defines roles, responsibilities, and dependencies.
3. **Business Process Workflow** – Salesforce-based supply chain flow.
4. **Use Case Matrix** – Mapped to Salesforce features.
5. **AppExchange Research Report** – Identified relevant apps for inventory & healthcare.