Project Title: Medical Inventory Management System (Salesforce Platform)

Date: November 02, 2025

Team ID: NM2025TMID05720

Maximum Marks: 4 Marks

This phase involves ideation and strategic planning to build a Salesforce-based Medical Inventory Management System for healthcare organizations. The objective is to identify every challenge in medical supply management, brainstorm creative solutions, and organize ideas into actionable plans that maximize operational efficiency, patient safety, and regulatory compliance.

Team Member Contributions

Team Member	Initial Idea	Built-On Idea
Team Member 1	Create custom objects for Medical Products and Inventory Locations using Salesforce	Add automated reorder alerts based on minimum stock thresholds
Team Member 2	Send automated expiry date notifications to prevent waste	Integrate barcode scanning for real-time consumption tracking
Team Member 3	Track inventory usage with live dashboards and analytics	Enable AI-powered demand forecasting using Einstein Analytics

Phase 1: Brainstorming, Idea Generation, and Prioritization

Purpose and Approach

Team Collaboration & Problem Statement

The project team collaborated to select the key challenge: creating a platform that enables systematic tracking of medical supplies, automated reorder management, expiry date monitoring, and compliance with healthcare regulations.

Each member shared experiences from healthcare settings and reviewed industry best practices for technology-enabled inventory management to support efficient and scalable workflows.

Brainstorming & Idea Listing

Team members freely shared ideas for automation, user experience, mobile access, and real-time communication.

Ideas were compiled to ensure inclusiveness and creativity before filtering and prioritization.

Grouping, Prioritization, and Action Planning

Idea Organization

Ideas were organized into categories:

- Medical product management

- Inventory location tracking

- Supplier relationship management

- Usage record documentation

- Automated reorder alerts

- Expiry date management

- Compliance and audit trails

- Mobile barcode scanning

- Real-time dashboards and reporting

Prioritization for Maximum Impact Prioritized

features include:

- Automation of stock level monitoring and reorder alerts

- Expiry date notifications to minimize waste

- Dashboards for live inventory tracking across locations

- Secure data management with comprehensive audit trails

- Integration with EHR systems and supplier ordering platforms

Polarization and Task Breakdown

Polarization of ideas helped break down the project into focused, manageable steps—each with clear responsibilities, timelines, and communication workflows.

Visual diagrams and stepwise flowcharts were used for clarity and stakeholder communication.

Action Plan & Next Steps

Chosen ideas were developed into actionable tasks:

1. **Build Salesforce Custom Objects**
   - Design Medical Product, Inventory Location, Supplier, and Usage Record objects
   - Establish relationships and data validation rules

2. **Automate Inventory Workflows**
   - Create Flow processes for automated reorder alerts when stock falls below thresholds
   - Implement expiry date notification automation using Salesforce process builder/flows
   - Configure approval processes for high-value items and controlled substances

3. **Design Dashboards and Reports**

   ° Build real-time dashboards for current stock levels and items below reorder points

   ° Create usage analytics showing consumption patterns by department

   ° Develop cost tracking reports for inventory optimization

4. **Implement Mobile and Integration Features**

   ° Enable barcode scanning capabilities for accurate tracking

   ° Integrate with EHR systems for procedure scheduling data

   ° Connect with supplier ordering platforms for automated procurement

5. **Schedule Team Progress Reviews** Conduct

   ° weekly team progress reviews

   ° Adapt plans based on feedback from healthcare administrators and clinical staff Ensure

   ° compliance with healthcare regulations throughout development

Conclusion

This brainstorming and prioritization phase established a clear roadmap for developing a Salesforce solution for medical inventory management. By organizing ideas systematically and assigning actionable tasks, the team is positioned to create a scalable, efficient, and compliant inventory management system that enhances patient safety, reduces waste, and optimizes healthcare operations.