Ideation Phase

Brainstorm & Idea Prioritization

Date	30 October 2025
Team ID	NM2025TMID04224
Project Name	Medical Inventory Management
Maximum Marks	4 Marks

Medical Inventory Management Template

This guided project demonstrates how to develop a Salesforce-based application to efficiently manage and track medical inventory across healthcare facilities. It focuses on ensuring that medicines, supplies, and equipment are available when needed, minimizing wastage and improving operational efficiency.

The workflow starts by setting up inventory records for various medical items, including details such as item name, stock quantity, expiry date, and supplier information. The system automatically updates stock levels when items are used or restocked. A business rule is then implemented to trigger alerts when stock levels fall below a defined threshold, helping staff take timely action.

Step-1: Team Gathering, Collaboration and Problem Selection

The team collaborated to identify critical challenges in hospital resource management. After discussions, the problem of *inefficient manual tracking of medical supplies* was selected. Managing medical inventory manually often results in stockouts, expired medicines, and wastage.
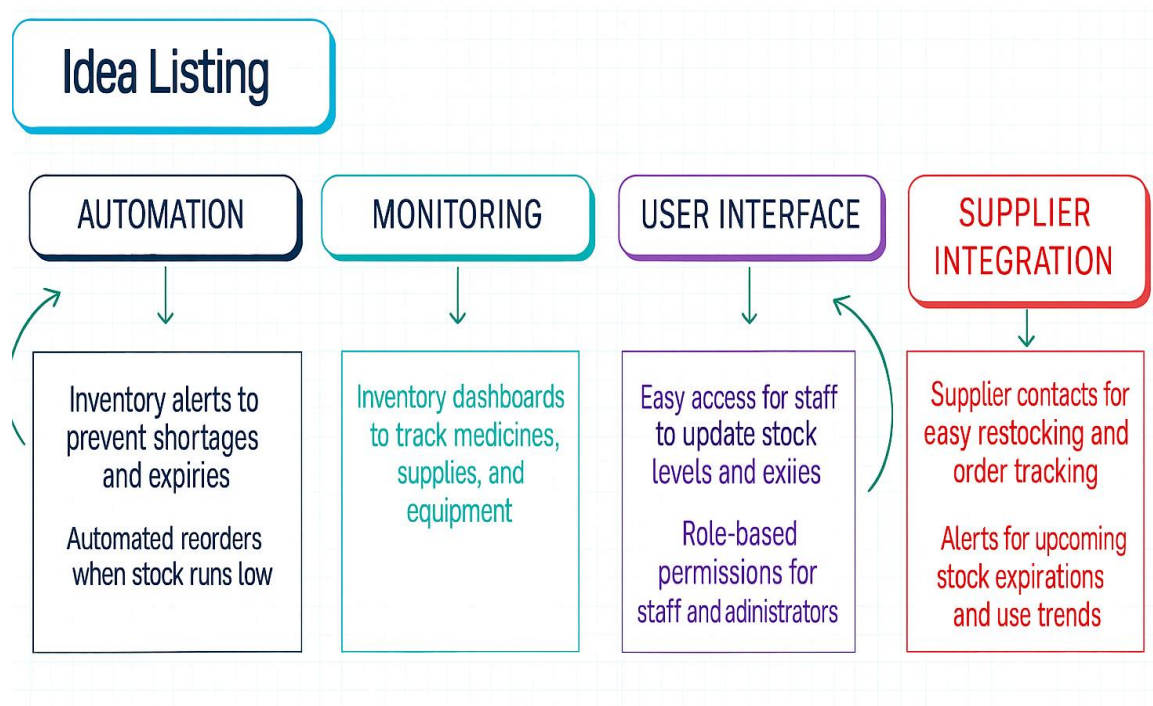
By addressing this issue through a Salesforce-based automation system, the project aims to enhance hospital inventory accuracy and streamline procurement processes.

STEP-1: TEAM GATHERING, COLLABORATION – PROBLEM SELECTION

Reference: https://www.mural.co/templates/brainstorm-and-idea-prioritization

Step-2: Brainstorming, Idea Listing, and Grouping

Idea Listing

AUTOMATION	MONITORING	USER INTERFACE	SUPPLIER INTEGRATION
Inventory alerts to prevent shortages and expiries

Automated reorders when stock runs low | Inventory dashboards to track medicines, supplies, and equipment | Easy access for staff to update stock levels and exiies

Role-based permissions for staff and adinistrators | Supplier contacts for easy restocking and order tracking

Alerts for upcoming stock expirations and use trends |

➢ **Brainstorm:**
Team members freely shared ideas related to stock tracking, supplier integration, expiry alerts, and system automation.

➢ **Idea Listing:**

Ideas were documented, such as real-time stock dashboards, automated reorder triggers, and expiry notifications.

➢ **Grouping:**

Similar ideas were categorized under "Automation," "Monitoring," and "User Interface" to streamline development.

➢ **Action Planning:**

Each member was assigned tasks — such as creating Salesforce objects, defining workflows, and setting up dashboards — with clear timelines for testing and deployment.

Step-3: Idea Prioritization

01 Real-time Inventory Monitoring

02 Salesforce Dashboard

03 Salesforce Dashboard

7 Keys to Salesforce-Based MEDICAL INVENTORY MANAGEMENT

05 Expiry Notifications

05 Automated Alerts

06 Expiry Notifications

06 Expiry Notifications

Idea Prioritization

Idea prioritization helped the team focus on the most impactful features. Core priorities included:

1. Real-time stock monitoring and automated alerts

2. Salesforce dashboard for easy visualization of item usage and stock trends

3. Role-based access control for staff and administrators

4. Supplier management and reorder automation

By focusing on these priorities, the project ensures that healthcare institutions can manage inventory efficiently, avoid shortages, and reduce waste. This structured approach strengthens reliability and improves patient care outcomes.