Phase – 1 (Clinic Appointment & Patient Management CRM)

Problem Statement

Small and medium-sized clinics are facing significant challenges in managing patient appointments, records, and follow-ups efficiently. Currently, most clinics rely on manual registers, phone calls, or basic spreadsheets to store patient details and appointment schedules. This fragmented approach often leads to missed appointments, double booking of doctors, loss of patient history, and poor communication with patients.

Additionally, clinics lack a centralized system to track patient visit history and appointment status in real time. Doctors do not have easy access to past patient records, which impacts the quality of consultation. Clinic administrators are unable to view daily appointment loads, doctor utilization, or missed appointments through reports or dashboards, limiting their ability to make informed operational decisions.

This manual and disconnected process results in operational inefficiencies, reduced patient satisfaction, and increased administrative workload.

The proposed solution is to develop a **Salesforce-based CRM system – Clinic Appointment & Patient Management CRM**, which centralizes patient data, automates appointment scheduling and reminders, improves visibility into clinic operations, and delivers actionable insights through reports and dashboards.

Phase 1.1: Requirement Gathering

The initial phase of the project focused on understanding the clinic's operational workflow and identifying the major pain points in appointment and patient management. A detailed analysis was carried out to capture functional and non-functional requirements necessary to improve efficiency and patient engagement.

Key Problems Identified

1. Manual Patient Record Management

- Patient details are stored in physical registers or Excel sheets.
- Patient history is difficult to retrieve during consultations.
- High risk of data loss or duplication.

2. Inefficient Appointment Scheduling

- Appointments are booked manually via phone calls.
- Double booking of doctors is common.
- No standardized appointment status tracking.

3. Lack of Appointment Reminders

- Patients do not receive automated reminders.
- High rate of missed or forgotten appointments.
- Increased idle time for doctors.

4. Poor Visibility for Doctors

- Doctors cannot easily view their daily schedules.
- Past patient visit history is not readily available.

5. Limited Reporting & Insights

- Clinic owners lack real-time visibility into appointments.
- No dashboards for daily, weekly, or monthly performance.
- Decision-making is delayed due to lack of data.

Phase 1.2: Stakeholder Analysis

To ensure the Clinic Appointment & Patient Management CRM meets business and operational needs, key stakeholders were identified and analyzed. Each stakeholder group has specific expectations and system requirements.

Main Stakeholders Identified

1. Clinic Admin

- **Need:** Overall control and visibility of clinic operations.
- **Requirement:** Dashboards showing appointment statistics, doctor utilization, and patient volume.

2. Receptionist

- **Need:** Simple and fast appointment booking.
- **Requirement:** Easy patient record creation, appointment scheduling, and status updates.

3. Doctors

- **Need:** Clear view of their appointment schedule.
- **Requirement:** Access to patient details and past visit history for better diagnosis.

4. Patients (Indirect Stakeholders)

- **Need:** Smooth appointment experience.
- **Requirement:** Appointment confirmation and reminder notifications.

5. System Administrator

- **Need:** Stable and secure CRM system.
- **Requirement:** Ability to configure users, automations, validations, and data management.

Phase 1.3: Business Process Mapping

To highlight efficiency improvements, the existing manual process (As-Is) was compared with the proposed Salesforce-enabled process (To-Be).

Current (As-Is) Manual Process

1. **Patient Registration**
    - Patient details recorded manually in registers or Excel.
    - No centralized patient database.
2. **Appointment Booking**
    - Appointments scheduled via phone calls.
    - Doctor availability checked manually.
3. **Appointment Follow-ups**
    - No automated reminders.
    - High number of missed appointments.
4. **Doctor Consultation**
    - Doctors rely on patient memory or paper files.
    - Past visit details often unavailable.
5. **Reporting**
    - Reports prepared manually.
    - No real-time operational visibility.

Proposed (To-Be) Salesforce-Enabled Process

1. **Centralized Patient Records**
    - All patient data stored securely in Salesforce.
    - Easy access to complete patient history.
2. **Automated Appointment Scheduling**
    - Appointments booked using Salesforce CRM.
    - Doctor assigned with availability tracking.
3. **Automated Notifications**
    - Appointment confirmation and reminder emails sent automatically.
    - Reduction in missed appointments.
4. **Doctor Dashboard Access**
    - Doctors can view daily schedules.
    - Quick access to patient details during consultation.
5. **Real-Time Reports & Dashboards**
    - Live dashboards for clinic admin.
    - Improved decision-making and operational efficiency.

Clinic Appointment & Patient Management CRM - Flow Diagram