



MediEase: A Salesforce-based Healthcare & Patient Relationship Management System

PHASE 1 – Problem Understanding & Industry Analysis

1. Requirement Gathering

Goal: Understand needs of different stakeholders in the healthcare ecosystem.

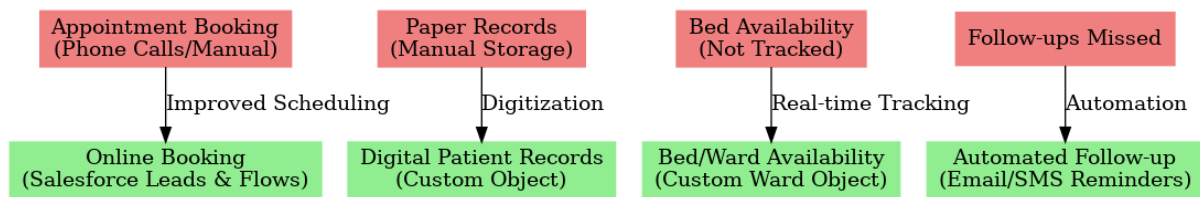
- **Patients** → Easy appointment booking, access to medical records, payment tracking, follow-up reminders.
 - **Doctors** → View schedules, patient history, and manage consultations efficiently.
 - **Hospital Admins** → Monitor patient inflow, doctor performance, bed/ward availability, and revenue.
 - **Pharmacy Staff** → Track prescriptions and manage medicine inventory.
 - **Insurance/Finance Team** → Validate patient claims, manage billing and settlements.
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2. Stakeholder Analysis

Goal: Identify roles and responsibilities.

- **Primary Stakeholders:**
 - Patients → Book appointments, view reports, pay bills, give feedback.
 - Doctors → Manage schedules, consult patients, upload prescriptions.
 - Hospital Admins → Oversee operations, capacity, and staff performance.
- **Secondary Stakeholders:**
 - Salesforce Admins → Configure & maintain CRM.
 - Finance/Insurance Team → Manage payments & claims.
 - Marketing Team → Promote health packages & wellness camps.

3. Business Process Mapping



Goal: Compare current hospital practices vs Salesforce-enabled improvements.

Current Process (Manual/Traditional):

- Appointments booked via phone → prone to delays & double-bookings.
- Patient history stored in paper files → difficult for doctors to access.
- No real-time view of bed/ward availability.
- Patients often miss follow-ups → leads to health risks.

Proposed Process (Salesforce Enabled):

- Online appointment booking → auto-scheduled in Salesforce.
- Patient records digitized in Salesforce → accessible to doctors anytime.
- Bed & room availability managed via **Custom Ward Object**.
- Automated reminders (SMS/Email) for appointments & medicine schedules.
- Dashboards for patient inflow, revenue, and doctor utilization.

4. Industry-Specific Use Case Analysis

Goal: Benchmark CRM use cases for healthcare.

- **Appointment Management**
 - *Problem:* Double-booking & missed slots.
 - *Solution:* Salesforce Flows + Apex Triggers for auto-scheduling.
- **Medical Records Tracking**
 - *Problem:* Paper-based history → lost/misplaced records.
 - *Solution:* Custom Patient Object with integrated EMR data.
- **Follow-up Reminders**
 - *Problem:* Patients miss follow-ups → reduced recovery.

- *Solution:* Automated reminders via SMS Magic.
 - **Revenue & Insurance Tracking**
 - *Problem:* Claims settlement delays.
 - *Solution:* Dashboards + Payment Gateway API integration.
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5. AppExchange Exploration

Goal: Identify apps to enhance system.

- **SMS Magic** → Appointment & reminder notifications.
- **Conga Composer** → Auto-generate medical bills & reports.
- **Survey Apps** → Capture patient satisfaction feedback.
- **Payment Gateway Connectors (Stripe/Razorpay)** → Enable online payments.