

Project Overview

Project Title

Hospital Appointment and Bed Management CRM System

This project will be developed **incrementally and systematically**, following **all ten standard Salesforce project phases**, aligned with real-world enterprise implementation practices.

Phase 1: Problem Understanding and Industry Analysis

This phase focuses on analysis and planning, without system configuration, reflecting real project kickoff methodology.

1. Business Problem Statement

Healthcare institutions face multiple operational challenges, including:

- High patient inflow
- Limited doctor availability
- Restricted bed capacity
- Risk of appointment overlap
- Requirement for approval of high-cost treatments
- Lack of centralized reporting

Challenges Without a CRM System:

- Duplicate or conflicting appointments
- Inefficient bed allocation
- Manual record keeping
- Limited visibility for management

Proposed Solution:

Implementation of a **Salesforce-based CRM system** to streamline hospital operations through automation, validation, and real-time reporting.

2. Stakeholder Identification

Stakeholder Role	Responsibility
System Administrator	Salesforce configuration and maintenance
Receptionist	Patient registration and appointment scheduling
Doctor	Schedule review and patient consultation
Hospital Manager	Approval of high-cost treatments
Patient	Receives notifications and confirmations

Stakeholder identification supports later design of roles, profiles, and security.

3. Business Process Flow

Patient visits or contacts hospital



Receptionist verifies doctor availability



Appointment is scheduled



If treatment cost exceeds ₹20,000 → Manager approval required



Appointment confirmation email is sent



Bed allocation performed (if admission required)

4. Industry-Specific Requirements and Salesforce Mapping

Healthcare Requirement	Salesforce Feature Utilized
Prevent overlapping appointments	Validation Rules, Apex Logic
Manage limited bed availability	Custom Objects and Tracking
Approval of high-value treatments	Approval Processes
Automated notifications	Flows and Email Alerts
Management reporting	Standard and Custom Reports

5. Justification for Salesforce Platform

Salesforce is selected due to its:

- Centralized and secure data management
 - Low-code and no-code automation capabilities
 - Robust role-based access control
 - Scalability for healthcare operations
 - Industry recognition as an enterprise CRM platform
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Phase 1 Completion Summary

Phase 1 successfully establishes:

- Clear problem definition
- Stakeholder understanding
- Business process visualization
- Technology alignment with industry needs

This mirrors the **initial analysis phase followed by professional Salesforce consultants** in real implementations.