Phase 1: Problem Understanding & Industry Analysis

Project Title: "Doctor Appointment & Consultation System " – Healthcare CRM

Industry: Healthcare (Telemedicine & Patient Management)

Project Type: B2C Salesforce CRM Implementation

Target Users:

- Patients (seeking consultations & medicine orders)
- Doctors (providing consultation & prescriptions)
- Clinic/Pharmacy Admins (managing schedules & inventory)
- Support Agents (handling patient queries & escalations)

Problem Statement

Healthcare providers face challenges in managing patient appointments, doctor availability, and prescription follow-ups. Traditional methods rely heavily on manual calls or offline systems, leading to:

- Missed or double-booked appointments.
- Slow response to patient queries.
- Inefficient tracking of prescriptions & medicine orders.
- Lack of real-time dashboards for consultation performance and revenue insights.

To overcome this, the company wants to implement a **Salesforce CRM-based Doctor Appointment & Consultation System** that ensures seamless booking, consultation, prescription, and medicine delivery.

Objectives

The proposed Salesforce CRM aims to:

1. Automate patient lead capture and appointment booking.
2. Enable doctors to manage consultations and issue digital prescriptions.
3. Allow pharmacies/admins to track medicine orders linked to prescriptions.
4. Provide AI-powered symptom triage (Agentforce) for patients.
5. Create dashboards to monitor appointments, doctor workload, and revenue.

Industry-specific Use Case Analysis

Healthcare Industry Needs:

- Telemedicine & Online Consultation.
- Prescription & Pharmacy Management.
- Patient Engagement through AI & automation.
- Secure handling of sensitive health data.

Use Cases

1. Lead Management

- Capture patient inquiries from online forms & health campaigns.
- Assign patients (leads) to available doctors based on specialization.
- Convert patient inquiries into confirmed appointments.

2. Appointment Scheduling

- Patients book slots with doctors via a self-service portal.
- Automatic SMS/email reminders for upcoming consultations.
- Avoid double-booking using scheduling logic.

3. Consultation & Case Handling

- Doctors manage patient cases via Service Cloud.
- Support agents handle escalations (missed appointment, refund request).
- Approval process for prescription release.

4. Prescription & Medicine Ordering

- Doctor prescribes medicine digitally.
- Prescription auto-linked to pharmacy order.
- Async Apex job for checking stock availability.

5. Reporting & Dashboards

- Track number of consultations per doctor.
- Monitor revenue from appointments & pharmacy orders.
- Dashboard for patient satisfaction and case resolution time.

Stakeholder Analysis

- **Patients** – Book appointments, consult doctors, order medicines.
- **Doctors** – Manage appointments, issue prescriptions, track cases.
- **Admins/Pharmacies** – Approve prescriptions, manage stock & revenue.
- **Support Staff** – Resolve escalated issues, manage queues.
- **Management** – Access dashboards for business performance.

Business Process Mapping (High-Level)

1. Patient fills inquiry form (lead created).
2. Lead assigned → Converted into Appointment (opportunity).
3. Appointment scheduled & linked to Doctor availability.
4. Doctor consultation completed → Prescription generated.
5. Prescription triggers medicine order (linked to pharmacy).
6. Reports & Dashboards provide insights to management.

AppExchange Exploration (Optional for later phases)

- **Health Cloud Packages** – for advanced patient record management.
- **Telemedicine Video Call Integrations** – for consultation.
- **E-Prescription Apps** – for compliance and pharmacy integration.