Phase 1: Problem Understanding & Industry Analysis

Goal of Phase 1:

The primary aim of this phase is to comprehend the challenges in managing patient records and treatment workflows, identify the stakeholders involved, and propose an improved system leveraging Salesforce CRM. This phase emphasizes gathering requirements, analyzing current versus proposed processes, and reviewing industry best practices.

1.Requirement Gathering

Activities Performed:

- Investigated the difficulties faced by patients, doctors, hospital staff, and administrative personnel in managing patient data.
- Examined existing manual record-keeping and its limitations.

Key Requirements:

- Accessing comprehensive patient history is time-consuming and error-prone.
- Patient visits, test results, and prescriptions are recorded in multiple disconnected systems.
- Manual coordination between departments delays patient care.
- Follow-up schedules and reminders are inconsistent.
- Lack of analytics for monitoring treatment patterns and resource allocation.

Output: A detailed requirements document highlighting system needs and challenges.

2. Stakeholder Analysis

Stakeholders Identified:

- **Patients:** Need accurate records and timely follow-ups.
- **Doctors/Nurses:** Require real-time access to patient history and lab reports.
- **Hospital Administrators:** Oversee appointments, billing, and patient management.
- **IT/Admin Staff:** Ensure system reliability, security, and compliance.
- **Regulatory Bodies:** Monitor patient data and trends for policy and reporting purposes.

Stakeholder Goals:

- Patients: Quick access to personal medical information and reminders for check-ups.
- Doctors: Streamlined access to complete patient records to provide efficient care.
- Admin Staff: Centralized management of patient data and appointments.
- IT/Admin: Maintain secure, reliable, and compliant systems.
- Regulatory Bodies: Obtain accurate data for decision-making and trend analysis.

Output: Stakeholder matrix detailing each stakeholder's role and objectives.

3.Business Process Mapping

Current Process (“As-Is”):

1. Patient visits hospital or clinic.
2. Staff records patient data manually on paper or separate systems.
3. Lab tests, prescriptions, and follow-ups are tracked individually.
4. Coordination between departments is slow.
5. Reporting and trend analysis is delayed and inefficient.

Proposed Process (“To-Be” with Salesforce CRM):

1. Patient details entered into the CRM via web portal, app, or front desk.
2. Test results, prescriptions, and treatment plans automatically linked to patient records.
3. Doctors and staff can access full patient history instantly.
4. Automated reminders and notifications for follow-ups, medication, and tests.
5. Admin dashboards provide real-time analytics on patient flow, treatment outcomes, and resource usage.

Output: “As-Is” vs “To-Be” flowcharts showing process improvement.

4.Industry-Specific Use Case Analysis

Healthcare Challenges Identified:

- Fragmented patient information across multiple departments.
- Delay in treatment decisions due to incomplete or missing records.
- Inconsistent patient follow-up and monitoring.

Salesforce CRM Use Cases Applied:

- **Case/Lead Management:** Treat each patient request as a Case; patients as Leads**.**
- **Service Console:** Single-view interface for doctors and staff to manage all requests.
- **Automation:** Automated alerts for upcoming appointments, tests, and follow-ups.
- **Dashboards**: Insights for administrators on patient statistics, treatment patterns, and resource utilization.

Output: Documented CRM use cases tailored to healthcare operations.

5.AppExchange Exploration

Applications / Tools Explored:

- **Salesforce Health Cloud**: Integrated patient management solution.
- **Patient Management Apps:** Modules for tracking appointments, records, and communication.
- **Scheduling & Follow-up Tools:** Automate notifications for check-ups and treatments.

Objective: Understand available tools and identify areas for innovation, such as smart patient reminders, centralized record access, and automated reporting.

Output: AppExchange research notes identifying potential features for project implementation.

End of Phase 1 Deliverables:

- Detailed problem statement and requirements document.
- Stakeholder analysis chart.
- “As-Is” and “To-Be” business process flows.
- Healthcare-specific Salesforce CRM use cases.
- AppExchange research and recommendations.