Hospital Patient Engagement & Appointment Management CRM

○ **Phase 1 – Problem Understanding & Industry Analysis**

Requirement Gathering

- Patients face delays in booking doctor appointments.
- Doctors manually maintain schedules → prone to double-booking.
- No reminders for follow-ups → missed consultations.
- Prescription and treatment history scattered → hard to track.
- Management has no clear analytics (doctor workload, patient flow, etc.).

Stakeholder Analysis

- **Patients** → Need easy appointment booking & reminders.
- **Doctors** → Want a clear schedule & quick access to patient records.
- **Reception/Admin Staff** → Manage registrations, billing, prescriptions.
- **Hospital Management** → Need dashboards for insights (visits, revenue, doctor performance).

Business Process Mapping (Simplified Flow)

1. **Patient Registration** → Name, age, gender, contact, medical history.
2. **Doctor Setup** → Specialization, available timings, consultation fees.
3. **Appointment Scheduling** → Request → Confirm availability → Assign doctor → Send confirmation.
4. **Consultation & Prescription** → Record diagnosis, add prescriptions.
5. **Follow-Up** → Automated reminders for next visit.
6. **Reports** → Weekly/monthly analytics.

Industry-Specific Use Case Analysis

- Healthcare industry emphasizes **privacy/security** → apply **field-level security & audit trail**.
- High importance on **appointment automation** → need **Flows + Apex triggers**.
- Multi-channel engagement (SMS, Email) → requires **integration**.

AppExchange Exploration

- **Health Cloud**.
- **SMS/Messaging apps** (e.g., Twilio for SMS reminders).