

Project Documentation

Healthcare Management System on Salesforce

Phase 1: Problem Understanding & Industry Analysis

Project Title

Healthcare Management System on Salesforce

Industry

Healthcare / Hospital Management / Patient Care

Project Type

B2C & B2B Salesforce CRM Implementation (Patients, Doctors, and Hospital Admins)

Target Users

- Patients can register and book appointments online.
 - Doctors can check histories, update prescriptions, and track treatments.
 - Automatic alerts/reminders improve follow-ups.
 - Admins get real-time dashboards on appointments, revenues, and patient trends.
 - Data access is secure and role-based.
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1. Problem Statement

Hospitals and clinics face several challenges:

- Appointment management is mostly manual, causing double bookings or conflicts.
- Patients often forget appointments due to no automated reminders.
- Doctors don't always have quick access to full patient history, leading to weak follow-ups.
- Health data is scattered across paper files, spreadsheets, or isolated tools..
- Administrators lack a unified dashboard to track hospital performance, patient flow, and revenue.

Proposed Solution

A centralized **Salesforce CRM solution** Where:

- Patients can register and book appointments online.
 - Doctors can check histories, update prescriptions, and track treatments.
 - Automatic alerts/reminders improve follow-ups.
 - Admins get real-time dashboards on appointments, revenues, and patient trends.
 - Data access is secure and role-based.
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2. Requirement Gathering

- **Patients:** Easy appointment booking/cancellation, reminders, and access to personal health records.
 - **Doctors:** Quick visibility into patient history and daily schedules, plus tools for prescriptions.
 - **Admins:** Centralized reports on hospital utilization, doctor workload, and revenue..
 - **Reception Staff:** Ability to manage, reschedule, and handle inquiries smoothly.
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3. Stakeholder Analysis

- **Primary Stakeholders:** Patients, Doctors.
 - **Secondary Stakeholders:** Reception/Appointment Staff, Hospital Administrators
 - **Tertiary Stakeholders:** IT/Support Teams, Salesforce Developers, System Integrators.
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4. Business Process Mapping

Current Scenario (Without Salesforce)

- Bookings over phone/manual registers.
- Records in paper files.
- No reminders → missed visits.
- Health tracking done manually.
- Reports made in Excel.

Proposed Future (With Salesforce)

- Appointment booking and management inside Salesforce.
 - Online self-booking portal (Experience Cloud).
 - Automated reminders via email/SMS/WhatsApp.
 - Digital health records updated directly in Salesforce.
 - Dashboards for admins showing real-time insights.
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5. Industry-Specific Use Case Analysis

- **Patient Registration:** Patients register online with personal & medical details.
 - **Appointment Booking:** Patients select a doctor, time slot, and confirm via portal.
 - **Doctor Dashboard:** Doctors view upcoming appointments, patient history, and update health records.
 - **Health Record Tracking:** System stores vitals, prescriptions, and follow-up dates.
 - **Reminders & Follow-ups:** Automated notifications sent to patients before appointments.
 - **Reporting & Analytics:** Dashboards for hospital admins to monitor trends and optimize resources.
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6. AppExchange Exploration

Potential Salesforce AppExchange solutions to leverage:

- **Twilio/WhatsApp Connectors** → Appointment reminders.
 - **Health Cloud Add-ons** → Prebuilt healthcare data models.
 - **Survey Apps** → Collect patient feedback after visits.
 - **Calendar & Scheduling Apps** → Advanced doctor schedule management.
 - **Analytics Apps** → For deeper insights into patient care and hospital revenue.
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Phase 1 Deliverable

By the end of Phase 1, we have:

- Defined the **problem statement** & proposed Salesforce-based solution.
- Identified **key requirements** from patients, doctors, admins, and staff.
- Analyzed **stakeholders** and their roles.
- Mapped **current vs future business processes**.
- Outlined **industry-specific use cases**.
- Explored potential **AppExchange solutions** to extend functionality.

Hospital Appointment & Health Tracker System

