# Project Documentation

Hospital Appointment & Health Tracker System on Salesforce

# Phase 1: Problem Understanding & Industry Analysis

## **Project Title**

Hospital Appointment & Health Tracker 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.

## **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.

## **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.

## **3. Stakeholder Analysis**

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

## **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.

## **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.

## **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.

## **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.

