MediCare Connect – Patient Appointment & Follow-up CRM

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

The healthcare industry faces challenges in efficiently managing patient appointments, doctor schedules, and medical case histories. Traditional systems rely on manual booking or siloed hospital software, leading to:

- Double-bookings and scheduling conflicts.
- Lack of automated appointment reminders.
- Poor visibility into doctor availability.
- Inefficient follow-ups and treatment tracking.

Key requirements identified:

- Centralized system to manage Doctors, Patients, Appointments, and Medical Cases.
- Ability to track doctor specialization, availability, and consultation fees.
- Appointment scheduling with status updates, reminders, and confirmation tracking.
- Medical case history linked to patients and doctors for ongoing treatments.
- Support staff and hospital admins should have role-based access.
- Reports and dashboards for monitoring appointments, doctor utilization, and patient inflow.

2. Stakeholder Analysis

Primary stakeholders:

- Hospital Admin -- manages the overall system, configures business rules.
- Doctors -- manage availability, consult patients, update medical cases.
- Receptionists/Support Staff -- book appointments, send reminders, track status.
- Patients (via receptionist input) -- receive appointment confirmations and follow-ups.

Secondary stakeholders:

- Hospital Management -- needs reports for decision-making.
- IT/Admin Team -- manages Salesforce configurations, user profiles, and security.

3. Business Process Mapping

Current (manual) process:

- Patient calls or visits hospital to request an appointment.
- Receptionist manually checks doctor availability.
- Appointment is scheduled on paper/excel, reminders are rarely sent.
- Medical history is stored separately and not linked to appointments.

Proposed (Salesforce CRM) process:

- Receptionist creates a new Appointment record in Salesforce.
- Appointment links to Doctor object (with specialization, fee, availability).
- Appointment links to Patient record (Contact or custom Patient object).
- System tracks status, source, confirmation, and reminders.
- Medical Cases can be created for treatments and linked to patient and doctor.
- Reports and dashboards give real-time visibility to management.

4. Industry-Specific Use Case Analysis

Healthcare & Clinics: Managing multiple doctors and patients daily.

Diagnostics Centers: Tracking consultations and follow-ups.

Telemedicine Providers: Appointment booking across different channels (web, phone, call center).

Multi-specialty Hospitals: Doctor availability management across departments.

This project addresses scalability, automation, and data centralization, which are critical for modern healthcare organizations.

5. AppExchange Exploration

Explored similar apps on Salesforce AppExchange for industry benchmarking:

- Health Cloud -- Enterprise-level healthcare CRM solution, but complex for small hospitals.
- Doctor Appointment Management Apps -- Provide scheduling features but lack full customization.
- Custom App Approach -- Chosen to balance simplicity, cost-effectiveness, and flexibility for our project.