

Project Title: *SmartCare – Healthcare CRM for Appointment Booking*

Industry: Healthcare / Patient Services

Project Type: B2C Salesforce CRM Implementation

Target Users: Patients, Doctors, Receptionists, Hospital Administrators

Problem Statement

Hospitals and clinics often struggle with manual appointment booking, overlapping schedules, and untracked patient histories. This results in long waiting times, missed follow-ups, and poor patient experience. Doctors lack an integrated view of patients' past records, while admins have limited real-time insights into hospital operations.

To address this, the organization wants to implement a Salesforce CRM to:

- Digitize patient registration and appointment scheduling
- Prevent overlapping bookings with real-time validation
- Track patient medical history and prescriptions
- Automate reminders for consultations and follow-ups
- Provide dashboards for daily appointments, doctor utilization, and revenue insights

Use Cases

Lead/ Patient Management

- Capture patient details from web forms or reception entries
- Auto-check duplicates using phone/email
- Qualify patients based on urgency or consultation type

Doctor & Availability Management

- Maintain records of doctors with specialization, availability, and consultation fee
- Auto-block unavailable slots with validation rules
- Free up slots after cancellations using batch jobs

Appointment Scheduling

- Patients/receptionists book slots online or offline
- System prevents overlapping appointments
- Send email/SMS confirmations and reminders
- Support rescheduling with approval processes

Reporting & Dashboards

- Real-time dashboards for daily appointments and no-shows
- Doctor utilization and consultation revenue tracking
- New vs Returning Patients

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

Example Requirements for SmartCare:

- Users should be able to book/cancel appointments online.
- Doctors should see daily schedules and patient history.
- System must send SMS/Email reminders.
- Admins should monitor daily appointments and revenue via dashboards.

Stakeholder Analysis

Identify who will use or benefit from the system.

Example Stakeholders:

- **Patients:** Book appointments, receive reminders, track prescriptions.
- **Doctors:** View schedules, access patient records, create prescriptions.
- **Receptionists:** Manage bookings and cancellations.
- **Admins:** Oversee hospital performance, doctor utilization, and finances

Business Process Mapping

Current Manual Flow (Problem):

- Patient calls or walks in → Receptionist notes details → Doctor checks paper records → No reminders → Poor tracking.

Proposed Salesforce Flow:

- Patient submits appointment request → Lead auto-captured in Salesforce → Appointment created after validation → Reminder sent → Doctor consultation → Prescription recorded → Dashboard updated.

Industry-Specific Use Case Analysis

Pain Points:

1. Manual bookings lead to overlapping appointments.
2. Patient medical history often fragmented.
3. Missed reminders cause no-shows.

Opportunities:

1. CRM-based lead-to-appointment flow improves efficiency.
2. Dashboards provide real-time visibility for management.
3. Automated reminders improve patient compliance.

AppExchange Exploration

Relevant apps to draw inspiration from:

1. Healthcare CRM apps
2. Appointment scheduling apps
3. Communication apps (SMS/Email connectors)

Decision: For capstone, SmartCare will implement **custom objects, flows, Apex, and LWC** but reference these apps as inspiration.