# 🏥 Hospital CRM – Phase 1 Document

## Problem Statement

Hospitals often struggle to manage patient interactions due to fragmented systems, manual communication, and lack of centralized records. Appointment scheduling, follow-ups, and patient history tracking are typically handled through phone calls, spreadsheets, or outdated systems, which leads to missed appointments, longer wait times, and poor patient experience. This inefficiency also results in reduced hospital revenue and administrative burden.

## Proposed Solution

A tailored Hospital CRM solution is needed to centralize patient information, automate appointment scheduling, send reminders, and streamline communication between patients, doctors, and hospital staff. The system will improve efficiency, enhance patient satisfaction, and provide real-time insights for better hospital management.

## Phase 1: Problem Understanding & Industry Analysis

### 1. Requirement Gathering

Objective: Identify functional and non-functional requirements for the Hospital CRM.

Activities:

- Conduct interviews with doctors, nurses, administrators, and patients to understand communication challenges.  
- Collect details about appointment booking, follow-ups, billing, and reporting.  
- Determine must-have features: centralized patient records, appointment scheduling, reminders, billing integration, and reporting dashboards.

### 2. Stakeholder Analysis

Objective: Identify stakeholders and their needs.

Key Stakeholders:

- Patients: Need seamless appointment booking, reminders, and access to records.  
- Doctors: Require quick access to patient history, test results, and upcoming schedules.  
- Hospital Staff: Need tools to manage patient flow, billing, and records.  
- Administration/Management: Require reporting, analytics, and financial tracking.

### 3. Business Process Mapping

Objective: Document current workflows and identify pain points.

Current Process:

- Patients call or visit to book appointments.  
- Staff manually update spreadsheets and records.  
- Reminders are rarely sent, causing high no-show rates.  
- Doctors rely on paper files or outdated systems for patient history.

Pain Points:

1. Missed appointments due to lack of reminders.  
2. No centralized tracking of patient history.  
3. Manual processes create inefficiency and errors.  
4. Limited insights for decision-making.

### 4. Industry Use Case Specific

Objective: Study how CRM is applied in healthcare.

Use Cases Identified:

- Automated appointment scheduling with SMS/email reminders.  
- Patient portals for accessing prescriptions, reports, and history.  
- Centralized dashboards for hospital management.  
- Reporting on patient flow, most booked doctors, and revenue leakage.

### 5. AppExchange Exploration

Objective: Explore existing healthcare CRM solutions.

Findings:

- Large solutions like Salesforce Health Cloud and Zoho CRM exist but are expensive and complex for smaller hospitals/clinics.  
- Opportunity: Build a lightweight, customized CRM tailored for small and mid-sized hospitals with:  
 - Centralized patient communication  
 - Appointment & workflow management  
 - Billing integration  
 - Reporting & analytics