Project HealthConnect 360

Phase 1: Project Discovery & Planning Report

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1.0 Executive Summary

This document outlines the findings and plan from the initial discovery phase for Project HealthConnect 360. The project's primary objective is to implement a Salesforce CRM system to resolve critical operational inefficiencies at a mid-sized medical clinic. The current reliance on manual processes results in high patient no-show rates, fragmented data, and a lack of analytical insight. This proposal details the project's scope, objectives, stakeholders, and the proposed future-state processes that will be enabled by the new system. The successful implementation of this project will lead to a significant reduction in administrative overhead, an increase in patient satisfaction, and the empowerment of management with data-driven decision-making tools.

2.0 Problem Statement

Mid-sized medical clinics often operate with disconnected systems and manual processes for managing patient care and administrative tasks. This fragmentation leads to significant operational challenges, including:

- **Inefficient Appointment Scheduling:** Manual scheduling using phone calls and paper calendars often results in double bookings, long patient wait times, and a high rate of no-shows.
- **Fragmented Patient Information:** Patient records are scattered across paper files and separate software, preventing a single, 360-degree view of a patient's medical history.
- **Poor Communication:** A lack of automated reminders and follow-ups leads to missed appointments and poor patient engagement in their own care plans.
- **Lack of Actionable Insights:** Management has no easy way to track key performance indicators like patient wait times, doctor utilization, or peak appointment hours to improve clinic operations.

3.0 Stakeholder Analysis

A critical step in the discovery phase is the identification of all individuals and groups who will be impacted by, or can influence, the project's success. This process involves conducting interviews and workshops to understand their specific needs, expectations, and potential concerns. The feedback gathered from these stakeholders will directly inform the system's design, user experience, and adoption strategy. The primary groups of potential stakeholders for the HealthConnect 360 project include:

- **Executive Leadership (Sponsors):** This includes the Clinic Director and other senior management. Their primary interests are the project's return on investment (ROI), its alignment with strategic business goals, and its ability to provide high-level performance metrics.
- **Administrative Staff (Key Users):** This group consists of the Office Manager and Receptionists. They are key to the project's success and are focused on process efficiency, reduction of manual tasks, and ease of use for scheduling and patient data management.
- **Clinical Staff (End Users):** This includes all Doctors, Nurses, and Lab Technicians who will interact with the system. Their main priority is quick, reliable access to complete and accurate patient information, streamlined note-taking, and clear visibility into their daily schedules and tasks.
- **Project Team:** This group, including the Project Lead and Salesforce Administrators/Developers, is responsible for the successful delivery of the project on time, within budget, and according to the defined requirements.

4.0 Business Process Mapping

A key part of this analysis was mapping the current versus the proposed future-state process for the core activity of appointment scheduling.

4.1 As-Is Process (Current State)

1. A patient calls the clinic.
2. The receptionist places the patient on hold and manually searches a physical diary or spreadsheet for an open slot.
3. The appointment is manually written down; the risk of data entry error or double booking is high.
4. The day before the appointment, the receptionist attempts to manually call each patient to confirm. This is time-consuming and often results in missed connections.
5. During the visit, the doctor must locate and retrieve a physical paper file to review the patient's history.

4.2 To-Be Process (Future State with Salesforce)

1. The receptionist books an appointment directly in Salesforce, viewing a real-time calendar of the doctor's availability. The system prevents double bookings.
2. Upon booking, the system automatically sends an SMS/email confirmation to the patient.
3. The system automatically sends a reminder 24 hours before the appointment.
4. When the patient checks in, their complete digital record is instantly available to the doctor on their workstation.

5. The appointment status (e.g., "Checked-In") is updated in real-time on the clinic-wide dashboard.

5.0 Industry-Specific Use Case Analysis

The solution must address the clinic's core needs by creating a single source of truth for patient information. This involves managing the entire patient journey, from initial onboarding and medical history capture to tracking ongoing care plans, ensuring clinical staff have instant access to complete, reliable data.

Key functionalities will include a smart scheduling system with automated reminders to reduce no-shows and manage staff availability. The system will also support clinical operations with digital visit notes and prescription logging, while providing real-time dashboards for data-driven decision-making by administrators and doctors.

6.0 AppExchange Exploration

A key requirement is sending automated SMS notifications for appointments to reduce patient no-show rates. Building this functionality from scratch is a complex technical task requiring significant developer resources and ongoing maintenance, making it an inefficient approach.

We highly recommend leveraging a pre-built solution from the Salesforce AppExchange. This approach is faster, more cost-effective, and provides a reliable platform. Initial exploration identifies leading solutions like **Twilio for Salesforce** and the **360 SMS App**, which offer robust, native integration for automating SMS workflows.