

- Medical Office Service Firm
- Works with 5 - 100 physicians
- Role: Technical Project Leader - manages outside suppliers in their projects
- Why do you need this?
 - Medical office will call/or he calls them “what can you do to streamline our office workflow, needs to communicate with patients, schedule appts”
 - He goes to them and finds out their needs and make recommendations for their systems
 - Software system to set up website
 - Might help set up the website
 - Scheduling Software
 - Medical Records Software
 - **Currently limited by how many people they have.** Wants to provide software that
 - Make it easy for the users to communicate with the patient regarding their care plan - drugs, tests
 - Wants it to be electronic
 - Medical professionals will tell them but also make it available online
 - Software that will allow them to set up their website (Primitive)
 - Communications for care plans. Wants a way to schedule or change their appts. Having your teeth cleaned, routine checkup, etc...Schedule appts that are simpler for physicians to schedule.
 - Will communicate with medical people and Liaison
 - Will improve their communication with their patients
 - Specific to practices - needs to be customizable. Should be able to pick style and background themes. Basic functionality WONT CHANGE
- Anything out there you’ve seen?
 - Not really.
 - Don’t want to integrate payment system, they have another service
 - **However the payment system might need to be accessed**
- Who will be using it?
 - Patients will access through web
 - Within office, doctors, nurses, hygienists, PA’s will ALL access - all for different things
- They should be able to customize it with their own interface. Different widgets.

Remember to ask about next steps or propose next steps!

Prepare opening, both sides get a chance to say what the meeting is about.

End part reversed - next steps.