
Steve Biko Hospital - Gynecological Unit & Post Natal

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Overview

"You are a pre-sales engineer and have been asked to prepare a presentation and demo of the capabilities of CRM for a hospital". Since the healthcare industry is huge, we decided to focus on the Gynecological Unit, which provides specialized medical services for women's reproductive health. In this project, we are also required to demonstrate the capabilities of all four pillars of Dynamics 365 CRM.

To start with, here are some common services offered in a Gynecological Unit:

- **Routine Examinations:** Routine check-ups; pelvic examinations, breast examinations, and Pap smears.
- **Pregnancy Care:** Prenatal care for expectant mothers. This includes regular check-ups, ultrasounds, monitoring the health of the mother and baby, and providing guidance classes on nutrition and lifestyle during pregnancy.
- **Family Planning:** The unit provides counseling and assistance for contraception and family planning options. They can help women choose the most suitable birth control method and provide information on fertility awareness, sterilization procedures, and emergency contraception.
- **Sexual Health Services:** The Gynecological Unit can provide counseling and treatment for sexually transmitted infections (STIs) and other sexual health concerns. They may conduct testing, prescribe medications, and offer education on safe sexual practices.
- **Cancer Screening and Treatment:** The unit may offer screenings and treatment for gynecological cancers, such as cervical, ovarian, uterine, and vulvar cancers. This can involve regular screenings, biopsies, chemotherapy, radiation therapy, and surgical interventions.

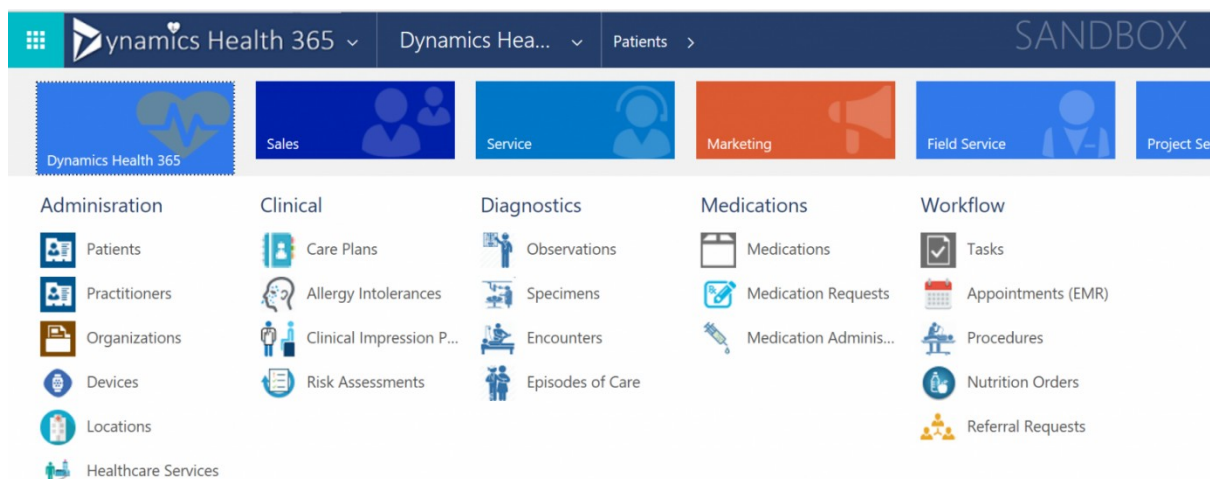
Using Dynamics 365 CRM

Microsoft Dynamics 365 CRM can be applied to a hospital setting to improve patient care, streamline processes, and enhance overall efficiency. Here are some ways in which Dynamics 365 CRM can be utilized in a hospital:

- **Patient Relationship Management:** Dynamics 365 CRM can serve as a centralized platform for managing patient information. It can store patient demographics, medical history, appointments, and communication preferences. This allows healthcare providers to have a comprehensive view of each patient, enabling personalized care and targeted communication.

- **Appointment Scheduling and Management:** The CRM solution can include features for appointment scheduling and management. It can provide a calendar view of available time slots, allow patients to schedule appointments online, send automated reminders, and track patient attendance. This helps in optimizing the scheduling process, reducing no-shows, and improving overall patient experience.
- **Patient Communication and Engagement:** Dynamics 365 CRM enables hospitals to communicate with patients through various channels, such as email, SMS, and patient portals. It can facilitate automated appointment reminders, share test results, provide educational materials, and send personalized health tips. This improves patient engagement, promotes proactive care, and fosters better patient-provider communication.
- **Referral Management:** The CRM system can track and manage patient referrals within a hospital network. It can capture referral details, track progress, and provide notifications to relevant departments. This ensures a smooth referral process, minimizes delays, and enhances collaboration between healthcare providers.
- **Case Management and Care Coordination:** Dynamics 365 CRM can support case management for complex patient cases or chronic conditions. It enables healthcare teams to collaborate, share patient information, and coordinate care plans. This promotes continuity of care, reduces redundant efforts, and improves patient outcomes.
- **Analytics and Reporting:** The CRM solution offers analytics and reporting capabilities that can provide insights into patient demographics, patient satisfaction, appointment statistics, and other performance metrics. This enables hospitals to identify areas for improvement, monitor key performance indicators, and make data-driven decisions to optimize operations and patient care.

The following screenshots shows the health care solutions using Microsoft Dynamics 365 CRM



Dynamic 365 for the healthcare industry is the right solution to manage the administrative processes of a business while also offering a comprehensive and clinical treatment system. It offers flawless features, including interactive patient experience, medical records tracking, patient data management, patient communication management, and centralized clinical data.

Microsoft Dynamics 365: Marketing

Microsoft Dynamics CRM – Marketing can be used for the following:

1. **Targeted campaign creation:** Create targeted marketing campaigns specifically tailored for gynaecological services and postnatal care, reaching out to potential patients with relevant messaging.
2. **Lead generation and management:** Capture and manage leads within the CRM system, tracking their interactions and progress through the marketing funnel, and nurturing them towards becoming patients.
3. **Segmentation and personalization:** Segment the patient database within the CRM system based on demographics, medical history, preferences, or other relevant criteria, allowing for personalized marketing messages and offers.
4. **Email marketing automation:** Automate email marketing campaigns using the CRM system, sending personalized emails to targeted segments of patients, promoting gynaecological services, postnatal care, educational resources, or special promotions.
5. **Social media integration:** Integrate social media channels with Microsoft Dynamics CRM, enabling the creation and scheduling of social media campaigns, posts, and advertisements, effectively reaching, and engaging potential patients.
6. **Event management:** Manage and promote events related to gynaecological services and postnatal care, such as health workshops, educational sessions, or support groups, attracting and engaging the target audience.
7. **Campaign performance tracking:** Monitor and track the performance of marketing campaigns within the CRM system, analysing metrics such as open rates, click-through rates, conversions, and return on investment (ROI), enabling optimization and refinement of marketing strategies.
8. **Customer journey mapping:** Map out the customer journey within the CRM system, understanding the various touchpoints and interactions patients have with the gynaecological unit and postnatal hospital, and optimizing marketing efforts accordingly.
9. **Referral program management:** Implement and manage referral programs within the CRM system, encouraging satisfied patients to refer their friends and family, and tracking the success and rewards associated with referrals.
10. **Marketing analytics and reporting:** Leverage the CRM system's reporting and analytics capabilities to gain insights into marketing performance, patient acquisition trends, campaign effectiveness, and patient preferences, facilitating data-driven decision-making and continuous improvement.

Microsoft Dynamics 365: Sales

The screenshot displays the Microsoft Dynamics CRM - Sales interface for a patient record. The top navigation bar includes options like New, Deactivate, Assign, Email a Link, Delete, Refresh, Process, Follow, and Flows. The patient's name, Stuart Bren, is shown at the top left, along with their Medical Record Number (MRN001), Business Phone (936-437-8857), and Email (StuartBren@rhyta.com). The interface is divided into several sections: Patient Information, Patient Relationships, Patient Details, and Address Information. The Patient Information section includes fields for Contact Type, First Name, Last Name, Primary Practitioner, Medical Record Number, Email, Home Phone, Mobile Phone, Business Phone, Contact Method, and Gender. The Patient Relationships section shows a list of related persons, including Mary Jones, who is the wife of Stuart Bren, with a relationship date of 7/3/2018. The Patient Details section includes a list of patient medications, such as Brufen 400mg and Panadol, with their respective dates and times. The Address Information section is partially visible at the bottom.

Microsoft Dynamics CRM – Sales can be used for the following:

1. **Manage patient information:** To store and manage patient records, including personal details, medical history, contact information, and any specific requirements or preferences.
2. **Appointment scheduling:** Facilitate the scheduling and management of patient appointments, ensuring efficient allocation of time slots for gynecological consultations and postnatal check-ups.
3. **Follow-up and reminders:** Automate follow-up processes, sending reminders to patients for upcoming appointments, postnatal visits, and other necessary follow-up procedures.
4. **Lead management:** Track and manage leads for potential patients, enabling the hospital to nurture and convert these leads into appointments or admissions.
5. **Create and manage marketing campaigns:** The hospital can leverage these features to promote gynecological services, postnatal care, and related programs, reaching out to potential patients through targeted campaigns.
6. **Communication and messaging:** Facilitate communication between the hospital and patients, allowing for personalized messaging, appointment confirmations, and sending relevant healthcare information or educational materials.
7. **Billing and payment tracking:** Track billing, invoices, and payment history, streamlining the financial processes and ensuring accurate and efficient management of financial transactions.
8. **Reporting and analytics:** Generate reports and provide insights into various aspects of the gynecological unit and postnatal hospital, such as patient demographics, appointment statistics, marketing campaign effectiveness, and revenue analysis, enabling data-driven decision-making and performance evaluation.

Microsoft Dynamics 365: Service

Microsoft Dynamics CRM – Service can be used for the following:

1. **Service request management:** Use Microsoft Dynamics CRM Field Service to efficiently manage and track service requests from patients or healthcare providers within the gynecological unit and postnatal hospital.
2. **Resource scheduling and dispatch:** Optimize resource allocation by effectively scheduling and dispatching healthcare professionals based on their availability, skills, and patient needs.
3. **Service level agreement (SLA) management:** Set up and manage SLAs within the CRM system, ensuring that service requests are addressed within defined timelines and meeting quality standards.
4. **Service contract management:** Maintain and manage service contracts within the CRM system, ensuring adherence to contractual obligations and facilitating efficient contract renewal processes.
5. **Service history and documentation:** Capture and maintain detailed service history and documentation for each patient within the CRM system, providing a comprehensive record of the services provided.
6. **Field service mobility:** Enable healthcare professionals to access service-related information, work orders, and patient details on mobile devices while on-site, facilitating real-time updates and enhancing productivity.
7. **Parts and inventory management:** Track and manage inventory and spare parts within the CRM system, ensuring their availability for service requests and minimizing downtime.
8. **Preventive maintenance:** Implement preventive maintenance plans within the CRM system, scheduling regular inspections, servicing, and maintenance to proactively address potential issues and ensure equipment and facilities are in optimal condition.
9. **Service analytics and reporting:** Leverage the CRM system's reporting and analytics capabilities to gain insights into service performance, resource utilization, service response times, and customer satisfaction, enabling data-driven decision-making and process optimization.
10. **Customer feedback and satisfaction tracking:** Utilize the CRM system to capture and track customer feedback and satisfaction ratings, allowing for continuous improvement and enhancing the overall service experience.

Microsoft Dynamics 365: Field Service

Microsoft Dynamics CRM – Field Service can be used for the following:

1. **Service request management:** Manage and track service requests from patients or healthcare providers for gynecological services or postnatal care.
2. **Resource scheduling and dispatch:** Efficiently schedule and dispatch the appropriate healthcare professionals, such as gynecologists, nurses, or technicians, based on their availability, skills, and patient needs.
3. **Equipment and asset management:** Track and manage medical equipment, devices, and assets used in the gynecological unit and postnatal hospital, ensuring their proper maintenance, servicing, and availability for patient care.
4. **Preventive maintenance:** Implement preventive maintenance plans within the CRM system to schedule regular inspections, servicing, and maintenance of medical equipment and facilities, minimizing downtime and ensuring optimal functionality.
5. **Work order management:** Create and manage work orders for various service tasks, such as equipment repairs, installations, or maintenance, assigning them to the appropriate personnel and tracking their completion.

6. **Mobile access and offline capabilities:** Enable healthcare professionals to access and update service-related information, work orders, and patient details through mobile devices, even in areas with limited or no internet connectivity.
7. **Service documentation and reporting:** Capture and maintain service-related documentation, including service reports, equipment service history, and maintenance records within the CRM system, ensuring accurate record-keeping and facilitating reporting and analysis.
8. **Customer feedback and satisfaction tracking:** Capture and track customer feedback and satisfaction ratings regarding service quality, enabling continuous improvement and enhanced patient experience.
9. **Service contract management:** Manage service contracts, warranties, and agreements within the CRM system, ensuring adherence to service level agreements and facilitating efficient contract renewal processes.
10. **Service analytics and insights:** Reporting and analytics capabilities to gain insights into service performance, resource utilization, service response times, and customer satisfaction, enabling data-driven decision-making and process optimization.