

Project Title: Healthcare Follow-up & Preventive Care CRM

Problem Statement

Hospitals and clinics face significant challenges in ensuring patients attend follow-up consultations and participate in preventive healthcare programs such as vaccinations, routine health checkups, and chronic illness monitoring. Manual tracking of patient visits and communication often leads to missed appointments, delayed treatments, and poor patient engagement.

These issues not only affect patient health outcomes but also result in inefficiencies and revenue loss for healthcare providers. There is a growing need for a **centralized CRM solution** that can automate appointment scheduling, send timely reminders, and provide visibility into patient follow-up compliance and preventive care participation.

By implementing a Salesforce-based CRM system, hospitals can:

- Manage patient records efficiently.
 - Automate reminders for follow-ups and preventive care.
 - Provide doctors and staff with real-time access to treatment history.
 - Enable management to monitor performance with dashboards and reports.
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Project Overview

The proposed solution is a Salesforce-based **Healthcare Follow-up & Preventive Care CRM** designed to help hospitals and clinics improve patient engagement. The system will manage patient records, automate appointment scheduling, and send timely reminders for follow-ups and preventive care programs such as vaccinations, health checkups, and chronic disease monitoring.

Who will use it?

- **Doctors & Nurses** → to track patient treatment plans and follow-ups.
- **Hospital Admin Staff** → to schedule appointments, manage records, and analyze reports.
- **Patients** → to receive reminders, check appointments, and stay engaged with preventive care.

How it will help?

This solution ensures that patients do not miss important medical appointments, improves preventive care participation, and reduces manual work for hospital staff. It will provide real-time dashboards to management, helping them monitor patient inflow, follow-up completion rates, and overall hospital efficiency.

Objectives

The main goals of the project are:

1. **Improve Efficiency** – Automate appointment scheduling and follow-up reminders.
2. **Automate Manual Tasks** – Reduce manual tracking of patient visits and preventive care programs.
3. **Provide Better Reporting** – Generate dashboards and reports on patient inflow, missed vs. completed follow-ups, and preventive care participation.
4. **Ensure Data Accuracy** – Maintain complete patient medical history and treatment details in one place.
5. **Enhance Patient Experience** – Keep patients engaged through timely notifications, reminders, and easy access to their appointment details.