Phase 10: Final Presentation & Demo Day

Goal

Showcase the **Medicare Cloud Project** end-to-end, highlight its value, gather feedback, and prepare it for portfolio or professional use.

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1 Pitch Presentation

Purpose: Summarize the project problem, solution, and benefits.

- **Include:**
  - Problem statement: Manual hospital workflows and scattered data.
  - Solution: Salesforce Medicare Cloud with Patients, Appointments, and Claims.
  - Key Features: Data model, automation, security, and integrations.
  - Benefits: Increased efficiency, reduced errors, and better patient care.
- **Tool:** PowerPoint or Google Slides.

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2 Demo Walkthrough

Purpose: Demonstrate the live Salesforce org.

- **Steps to Demo:**
  1. Log in as **Doctor** → Create Patient & Appointment.
  2. Log in as **Nurse** → Update notes and view appointments.
  3. Log in as **Insurance Officer** → Process an Insurance Claim.
  4. Log in as **Admin** → Show Dashboards & Reports (e.g., today's appointments, claims).
  5. Highlight **Automation** → Show Validation Rule error, Workflow email, or Flow execution.
- **Pro Tip:** Use a pre-planned demo script to avoid missing steps.

3 Feedback Collection

Purpose: Gather insights from stakeholders, mentors, or users.

- **Methods:**
    - Google Form or MS Forms survey.
    - Live Q&A during demo.
    - Post-demo email follow-up.
- **Sample Questions:**
    - Does the solution meet requirements?
    - What functionality is missing?
    - Is the UI easy to use?

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4 Handoff Documentation

Purpose: Ensure smooth transition to future admins or developers.

- **Deliverables:**
    - **Admin Guide:** Users, Profiles, Roles, Permission Sets.
    - **Technical Guide:** Objects, Fields, Automations, Integrations.
    - **Deployment Guide:** Sandbox → Production steps.
    - **Known Issues & Future Enhancements.**

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5 LinkedIn/Portfolio Showcase

Purpose: Highlight project experience publicly.

- Create a **LinkedIn Post/Article** with:
    - Title: *"Salesforce Healthcare Project – Medicare Cloud"*
    - Key highlights (data model, automation, integration).
    - Screenshots or demo video.
    - Hashtags: #Salesforce #Healthcare #CRMProjects.
- Add project write-up and artifacts to **Portfolio/Resume**.

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6 Final Checklist

✓ Pitch deck ready

✓ Demo script rehearsed

✓ Feedback method prepared

✓ Documentation complete

✓ Portfolio/LinkedIn post drafted