**Smart Healthcare Equipment Rental & Tracking CRM**

**1. Goal**

* Hospitals, clinics, and home-care providers often need **short-term or long-term rental of healthcare equipment** (e.g., wheelchairs, ventilators, oxygen concentrators, patient monitors).
* Current rental processes are manual (paper, phone, Excel), leading to **overlapping bookings, missing returns, and poor tracking of revenue & inventory**.
* We aim to build a **Salesforce CRM solution** that enables **real-time equipment availability tracking, automated booking workflows, approvals, notifications, and reporting**.

**2. Requirement Gathering**

**Stakeholder Conversations**

* **Healthcare Equipment Manager:** Wants real-time inventory tracking, prevent double bookings, revenue visibility.
* **Rental Agents:** Need quick way to check equipment availability & create/manage bookings.
* **Customer Service:** Handle issues, damaged equipment, and return requests.
* **Hospital/Clinic Customers:** Expect smooth booking, delivery, and return process.

**Example Requirements:**

Track all equipment with **availability, maintenance, and location status**.

* Allow **customers/hospitals to book equipment online**.
* Prevent **overlapping bookings** (if ventilator #3 is rented, it cannot be double-booked).
* Generate **utilization, maintenance, and revenue reports**.
* Automated **approval process for high-value rentals** (e.g., expensive machines).
* Send **SMS/Email notifications** to customers for booking confirmations, renewals, and returns.

**3. Stakeholder Analysis**

* **Admin:** Sets up CRM, configures workflows, manages users.
* **Rental Agents:** Create/manage bookings, check availability, handle returns.
* **Manager:** Approves high-value rentals, monitors revenue & utilization reports.
* **Customer Service:** Handles complaints, damage reports, and escalations.
* **Customers (Hospitals/Clinics/Home-care):** Request equipment, confirm bookings, extend or return rentals.

**4. Business Process Mapping**

**Workflow:**

1. Customer requests equipment rental.
2. Rental Agent checks **availability & condition**.
3. Booking is created in CRM.
4. If high-value → Manager approval required.
5. Notification sent to customer (confirmation).
6. Equipment delivered → Start rental period.
7. End of rental → Return & condition check.
8. CRM updates inventory status (available/maintenance).
9. Reports generated (revenue, utilization, maintenance).

**5. Industry-Specific Use Case Analysis**

* **Healthcare Equipment is highly regulated & sensitive.** Must track usage, condition, and maintenance history.
* Unlike cars, equipment requires **sanitization & maintenance after each use**.
* **Rental periods vary widely** (hours → months).
* **Emergency rentals** (e.g., oxygen concentrators during crises) require priority workflows.
* CRM should allow **dynamic pricing, discounts, and insurance add-ons**.

**6. AppExchange Exploration**

* Similar apps exist for **asset rental, inventory management, and hospital management**, but most are generic.
* Few provide **dedicated healthcare equipment tracking + rental workflows**.
* Opportunity: Build a **customized, industry-specific CRM app** to handle **inventory + approvals + notifications + compliance tracking**.