Phase 1: Problem Understanding & Industry Analysis

1. Industry Overview – Healthcare

The healthcare industry is one of the most dynamic and essential sectors globally, providing critical medical services, patient care, and wellness solutions. Hospitals and clinics handle thousands of patients daily, generating large volumes of data related to appointments, treatments, billing, and insurance. The industry faces constant challenges in patient

engagement, service delivery, and efficient management of resources.

In the modern era, digital transformation is reshaping healthcare, with hospitals adopting CRM systems to centralize data, automate workflows, and improve patient-doctor communication. Salesforce, as the world's leading CRM platform, offers tools to address inefficiencies, enhance patient experiences, and enable data-driven decision-making.

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2. Business Problem Statement

A multi-specialty hospital receives numerous patient inquiries and appointment requests daily via website, mobile apps, and call centers. The current manual process for appointment scheduling often leads to:

- Double bookings and scheduling conflicts

- Missed follow-ups due to lack of reminders

- Fragmented patient records across different systems

- Difficulty for doctors to access complete medical history during consultations

- Lack of real-time dashboards for administrators to track hospital performance

As a result, patients experience delayed services, poor communication, and lower satisfaction levels, while hospitals face inefficiencies and revenue leakage.

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3. Objectives of the Salesforce Solution

The aim of this project is to leverage Salesforce CRM to streamline patient engagement and appointment management by:

- Automating appointment booking, reminders, and follow-ups

- Centralizing patient data (demographics, medical history, prescriptions, billing)

- Enabling doctors to view complete patient profiles in real-time

- Providing hospital administrators with reports and dashboards on appointments, revenue, and doctor utilization

- Improving patient satisfaction and retention through personalized care and communication

Phase 1: Problem Understanding & Industry Analysis

4. Industry Overview – Healthcare

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5. Business Problem Statement

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6. Objectives of the Salesforce Solution

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