# Hospital/Clinic Appointment & Patient Management CRM Platform

## Phase 1: Problem Understanding & Industry Analysis

**Industry:** Healthcare / Clinic Management

**Project Type**: Salesforce CRM Implementation (Admin + Developer)

**Target Users:** Clinic Administrators, Doctors, Front Desk Staff, Patients

### Problem Statement

Small to mid-sized clinics often face challenges in efficiently managing appointments, patient records, and doctor schedules.   
• Double-bookings and scheduling conflicts.  
• Difficulty in tracking doctor utilization and daily appointments.  
• Limited visibility into patient visit history and follow-ups.  
  
These issues result in wasted time, lower patient satisfaction, and operational inefficiency.

### Goal

Develop a Salesforce-based platform that:  
• Centralizes doctor, patient, and appointment records.  
• Automates appointment booking and reminder notifications.  
• Provides **real-time dashboards for management and utilization tracking**.  
• Offers a scalable solution with secure, role-based access.

### Requirement Gathering

#### Business Needs

• Centralized appointment management for staff and doctors.  
• Automated patient reminders via email/SMS.  
• Quick creation and update of patient records.  
• Real-time reports on doctor schedules and patient volume.

#### Functional Requirements

• **Doctor Object** – details, specialization, availability schedule.  
• **Patient Object** – personal information, contact, medical history.  
• **Appointment Object** – links Doctor and Patient, includes date, time, status.  
• **Automated Flows** – reminder emails/SMS 24 hours before appointments.  
• **Dashboards** – daily/weekly appointments, doctor workload.

#### Non-Functional Requirements

• Mobile-friendly through Salesforce app.  
• Role-based access control (Admin, Doctor, Staff).  
• Scalable to support multiple clinics and thousands of patient records.  
• Simple and intuitive UI using Lightning App Builder.

### Stakeholder Analysis

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| Stakeholder | Needs / Responsibilities |
| Clinic Administrator | Monitor operations, access all reports, manage security and permissions. |
| Doctors | View personal schedule, update appointment status, record notes. |
| Front Desk Staff | Book and cancel appointments, manage patient records, send reminders. |
| Patients | Receive timely confirmations and reminders, maintain personal visit history. |
| Salesforce Admin | Maintain configuration, troubleshoot, and ensure data integrity. |

### Business Process Mapping

Current Manual Process:  
• Patients call or visit to book an appointment.  
• Staff manually checks doctor availability in registers or spreadsheets.  
• Reminders are sent manually **via phone calls or messages.**  
  
Proposed Salesforce Process:  
• Staff or patient portal request creates an Appointment record.  
• Flow validates doctor availability before confirmation.  
• Automatic email/SMS **reminders sent 24 hours prior**.  
• Doctor updates appointment status, notes captured in Patient record.

### Industry-Specific Use Cases

• Automated Appointment Reminders to reduce no-shows.  
• Doctor Utilization Dashboard for operational insights.  
• Patient History Tracking for better treatment continuity.  
• Optional Experience Cloud portal for patient self-booking.

### AppExchange Exploration

• **Health Cloud** – comprehensive healthcare management features, but heavy for small clinics.  
• **CalendarAnything** – advanced calendar views for scheduling.  
• **Twilio for Salesforce / SMS Magic** – for SMS appointment reminders.  
• **DocuSign for Salesforce** – optional patient consent forms.