

SALESFORCE PROJECT IMPLEMENTATION PHASES

Phase 1: Problem Understanding & Industry Analysis

Problem:

A Smart Healthcare Appointment & Patient Follow-up CRM powered by Salesforce designed to transform patient management.

It goes beyond traditional features (appointment scheduling, automated reminders, patient history tracking, and follow-up management) by adding AI-powered appointment optimization, chatbot-based patient interaction, predictive analytics dashboards, and telemedicine integration to improve healthcare efficiency and patient care.

1. Requirement Gathering

Despite providing essential healthcare services, many clinics still rely on traditional, manual processes such as notebooks, spreadsheets, and phone calls to manage patient interactions.

Our upgraded CRM addresses these pain points with intelligent automation and predictive tools.

Current Problems & Pain Points:

- **Manual & Static Appointment Scheduling**
Appointments managed in notebooks or spreadsheets; staff cannot forecast busy periods or predict no-shows.
Our CRM uses AI-based slot prediction to recommend least busy times and reduce waiting

- **Lack of Automated, Personalized Reminders**
Patients miss appointments due to no reminders or generic reminders.
Our CRM sends dynamic, multi-channel reminders (SMS/WhatsApp/Email) triggered by patient risk scores.
- **Limited Access to Patient History & No Predictive Insights**
Doctors rely on scattered or paper-based records. Our CRM consolidates full medical history plus predictive risk alerts for chronic or high-risk patients.
- **No Real-Time Visibility or Analytics**
Managers lack dashboards showing predicted inflow, no-show risk, doctor workload, and revenue impact.
Our CRM provides real-time dashboards + predictive analytics to plan staff and reduce bottlenecks.

2. Stakeholder Analysis

Stakeholder	Role in System	Enhanced Needs (Upgraded CRM)
Receptionist	Creates appointments, manages patient inquiries	Smart UI with AI-suggested least busy slots, one-click rescheduling, WhatsApp confirmations
Doctor	Attends patients, prescribes medicines	Daily schedule view + predictive workload, access to full patient history & alerts
Clinic Manager	Oversees operations	Real-time dashboards with predictive inflow, no-show trends, and performance metrics

Patient (external) Visits or consults virtually Chatbot-based appointment booking, least busy time suggestions, telemedicine integration, multi-channel reminders

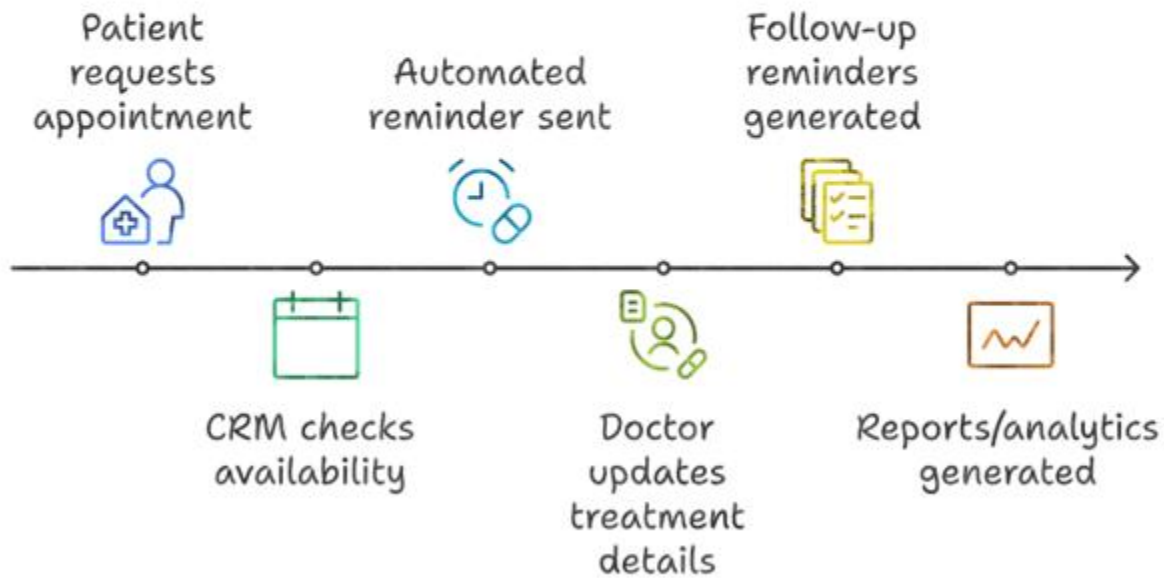
3. Business Process Mapping

- Current Challenges in Healthcare Appointment & Follow-up:
- Manual appointment scheduling leading to delays and double-booking.
- High no-show rate due to lack of personalized reminders.
- Difficulty tracking patient history and identifying high-risk patients.
- No predictive analytics or dynamic workload management.
- Limited patient engagement outside hospital visits.

Proposed CRM Process Flow (Upgraded):

- Patients interact via chatbot or portal → system predicts least busy slots → suggests to patient.
- AI model calculates no-show risk → automatically triggers extra reminders or reassigns slots.
- Doctors see consolidated patient history + risk alerts before consultations.
- Managers access real-time predictive dashboards for patient inflow, no-shows, and staff performance.

Patient Appointment and Treatment Process



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4. Industry-Specific Use Case Analysis

- **AI-Powered Appointment Scheduling:** Patients book/reschedule/cancel appointments via chatbot/portal; system predicts least crowded slots.
- **Automated Multi-Channel Reminders:** Dynamic SMS/WhatsApp/email reminders tailored to no-show risk level.
- **Patient History & Risk Tracking:** Unified medical history with predictive alerts for chronic conditions or urgent follow-ups.
- **Follow-up Management:** Automated workflows ensuring continuity of care with post-treatment reminders and personalized care tips.

- **Predictive Analytics & Dashboards:** Hospital admins view upcoming inflow, patient engagement metrics, and no-show forecasts.
- **Smart Chatbot Interface:** Patients interact conversationally to book appointments, get reminders, and receive health tips.

5. AppExchange Exploration (Aligned to Advanced CRM)

- **Salesforce AppExchange** offers several AI- and healthcare-focused applications we can leverage:
- **Salesforce Health Cloud:** Patient management, care coordination, EHR integration.
- **Einstein Prediction Builder:** Predict appointment no-shows and recommend optimal slots.
- **Einstein Bots:** Smart chatbot integration for appointment booking and follow-ups.
- **DocuSign for Healthcare:** Secure patient consent and digital signatures.
- **SMS & WhatsApp APIs:** Personalized, automated reminders.
- **Calendar Integration Apps:** Sync appointments with Google/Outlook calendars for staff and patients.