

# SALESFORCE PROJECT IMPLEMENTATION PHASES

## **Phase 1: Problem Understanding & Industry Analysis**

Problem: A Healthcare Appointment & Patient Follow-up CRM designed to simplify patient management. Features include appointment scheduling, automated reminders, patient history tracking, and follow-up management 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.

#### **1. Appointments Managed in Notebooks/Spreadsheets**

Clinic staff record patient appointments manually in registers or Excel sheets. This process is error-prone, leading to double-bookings, missed slots, and confusion during peak hours.

#### **2. Lack of Automated Reminders**

High “No-Show” Rate and patients do not receive reminders about their scheduled visits. As a result, a significant number of patients forget their appointments, causing a high no-show rate.

### 3. Limited Access to Patient Visit History

Doctors often depend on paper-based records or ask patients for medical history. This creates treatment gaps and affects the quality of patient care.

### 4. No Real-Time Visibility for Clinic Managers

Managers have no consolidated dashboard or reporting mechanism. They cannot easily track the number of patients served per day, appointment cancellations, or staff performance.

## 2. Stakeholder Analysis

Stakeholder	Role in System	Needs
Receptionist	Creates appointments, manages patient inquiries	Simple UI to book & reschedule
Doctor	Attends patients, prescribes medicines	Daily schedule view, access to history
Clinic Manager	Oversees operations	Dashboards for appointments, doctor workload
Patient (external)	Visits clinic	Confirmation & reminder of appointments

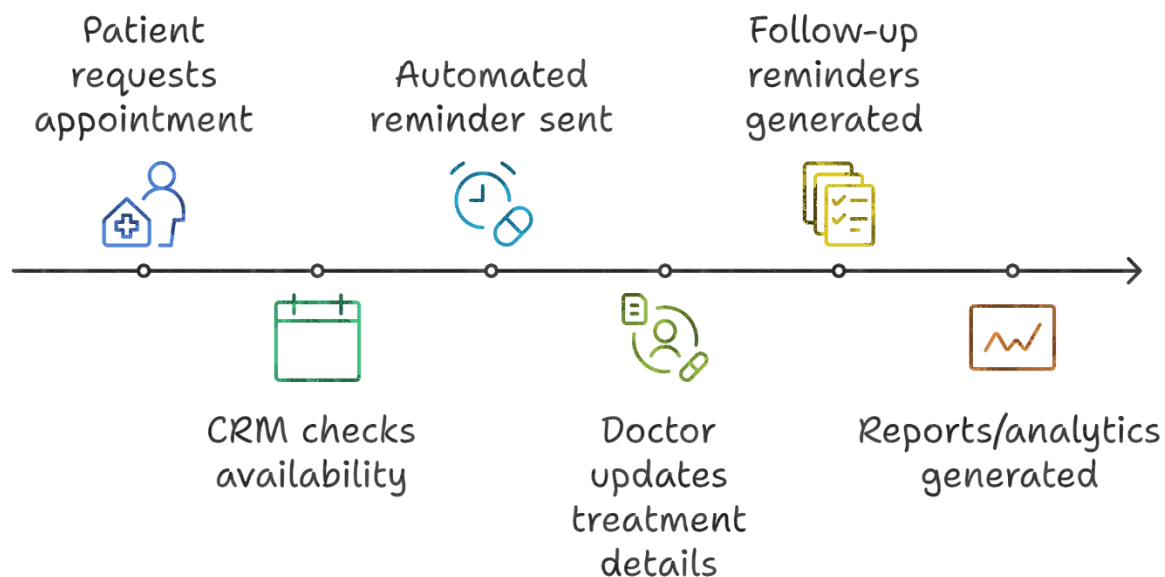
### 3. Business Process Mapping

Current Challenges in Healthcare Appointment & Follow-up:

- Manual appointment scheduling leading to delays.
- High rate of missed appointments due to no reminders.
- Difficulty in tracking patient history & follow-ups.
- Lack of automated reporting & analytics.
- Limited patient engagement outside hospital visits.

Proposed CRM Process Flow:

#### Patient Appointment and Treatment Process



## **4. Industry-Specific Use Case Analysis**

- Appointment Scheduling: Patients book/reschedule/cancel appointments via CRM.
- Automated Reminders: Reduces no-shows by sending SMS/email reminders.
- Patient History Tracking: Consolidated medical history for better treatment decisions.
- Follow-up Management: Ensures continuity of care with post-treatment reminders.
- Analytics & Reporting: Helps hospitals track performance, patient inflow, and care quality.
- Integration with Telemedicine: Seamless video consultations and prescription tracking.

## **5. AppExchange Exploration**

Salesforce AppExchange offers several healthcare-focused applications. Some relevant inspirations:

- Health Cloud (Salesforce): Patient management, care coordination, EHR integration.
- DocuSign for Healthcare: Secure patient consent forms.
- SMS APIs: Appointment reminder notifications.
- Calendar Integration Apps: sync with Google Calendar.

