

# Salesforce CRM Driving Enhanced Healthcare Experience



Healthcare institutions today are more focused on enhancing patients' health and optimizing their internal systems. However, they still depend on legacy systems, which hampers innovation. This strategy proves ineffective as today's patients seek comfortable access to healthcare and personalized treatment. A complete CRM system tailored to these demands can resolve this obstacle by offering precisely what both patients and healthcare organizations want.

Several healthcare institutions began to understand the value of CRM and embrace it. The global healthcare CRM market is forecasted to reach \$20 billion by 2023, according to MarketsAndMarkets.

## A Sneak-Peak into Salesforce Healthcare CRM

Salesforce Healthcare CRM is a complete solution, targeting healthcare institutions that want to separate themselves by offering a better patient experience. This CRM tool helps healthcare hospitals build one-to-one relationships with their current patients and draw new ones.

Salesforce CRM allows building comprehensive patient profiles and obtaining an in-depth picture of a patient's health using Einstein-based analytics.

The tool also helps to segment patients into groups based on their health requirements. Additionally, it grants a reliable platform for storing patients' electronic health reports and making them available to all authorized individuals.

## A Sneak-Peak into Salesforce Healthcare CRM

Intuitive Surgical is an advanced healthcare company that launched the da Vinci Surgical System in the late 90s. As the business developed, their current customer management system, based on spreadsheets, was no longer viable. They started looking for more effective options to handle their sales and plan for a better tomorrow. This was when they adapted to Salesforce.

For Intuitive Surgical, Salesforce CRM became a sound system for saving and analyzing different patient-related data types and producing relevant insights in real-time. Moreover, they gladly embraced the Chatter choice that enabled safe and fast interaction between its salespeople.

# Salesforce CRM functionalities that set them apart!

## Task Management

The Salesforce CRM task management segment enables the clinical staff to add and delegate tasks, assign priorities, etc. The module carries a chatting functionality and extends a reliable and centralized place for discussions with co-workers, other providers, and patients.

## Communication

Salesforce CRM strives to extend a safe setting for conversation inside the healthcare institution and with patients. It involves scheduling meetings, tracing formal communications by phone and email, and simply chatting with co-workers about beneficial books and workshops.

## Patient Profile Management

This segment lets healthcare staff build patient profiles and modernize existing ones. The patient profile includes contact data, demographics, reports of medical situations, former and planned meetings, etc.

## Reporting

This module is accountable for creating custom reports, like a patient's adherence to the medication plan, campaign Return On Investment, and referral patients' dashboard.

# How Salesforce creates new opportunities? & Benefits?

Healthcare institutions are wary about advertising their use of CRM since it is a well-known sales tool. However, Salesforce CRM brings benefits like helping healthcare departments establish their internal processes, enhancing their relationships with patients, and drawing new patients.

Today, customers expect to experience a personalized service every time they are dealing with service providers. Those in the healthcare industry are no exception.

- Salesforce CRM offers many chances to stay in touch with the patient and enhance their health management engagement. Salesforce CRM automates medication consumption reminders and follow-up emails with health advice and healthcare services related to their health.
- Health care workers are not always open to answer phone calls and emails, even though patients might have such needs. Salesforce has an intelligent chatbot that can respond to patients' concerns and comfort them.
- Salesforce CRM enables healthcare institutions to store and recover important patient data such as birthdate, gender, profession, etc. It helps send patients wishes, discounts on appropriate medical treatments, notices about medication intakes, and newsletters including health advice meant for particular patient groups. It automates appointment notices and enables prompt rescheduling if the patient cannot make it on time.
- Salesforce helps tracking and management of referral patients. Suppose it identifies that the patient hasn't planned for an appointment. It will inform the healthcare facility to reach out to the patient and continue the disrupted care.
- Salesforce CRM can automatically give post-appointment feedback surveys to patients and probe the collected data. It helps assess the quality of services and convert unhappy patients back by taking appropriate and suitable action.
- Salesforce CRM enables including several security mechanisms to protect patients' health data. It involves data encryption, multi-level authentication, HIPPA-compliant data storage, and digital signature.
- Salesforce enables effective and reliable communication workflows. It serves as a well-protected centralized center for precise record-keeping across touchpoints.
- Salesforce CRM can gather and update a patient's payment details and produce bills. It incorporates analytical tools allowing real-time tracking of the payment. It will enable the healthcare department to schedule automatic warnings if the payment is not completed on time.

## Closing thoughts!

If done rightly, a CRM can help you better comprehend and serve patients, reconnect with current patients, and pull new ones. Before reaching CRM vendors, set your business case and fix critical goals that you want to accomplish using the CRM tool.

Otherwise, you will end up blowing your budget on highlights that do not add value to your practice. Make sure the new CRM tool can substitute or be integrated with your current caregiving applications in a way that does not result in repeated data and efforts.

For more information, [contact@criticalriver.com](mailto:contact@criticalriver.com)



CriticalRiver is a trusted digital technology consulting company with a demonstrated track record of successful technology implementations in areas such as Digital Transformation, Digital Engagement, and Digital Engineering.

We implement and offer consulting services for CRM, Supply Chain, and Integration Solutions by leveraging our skills and capabilities in cutting-edge technologies. We help enterprises simplify, automate, improve, and enhance operations and processes to scale and grow.

We are also technology partners for Salesforce, Oracle, NetSuite for consulting, implementations, managed, and advisory services. Our highly experienced consultants are experts at understanding customers' needs and delivering strategic solutions that leverage the latest technologies and industry best practices.