

A Prominent Healthcare Services Provider Maximizes Efficiency and Improves Customer Experience with Salesforce®



The Client Profile

The client stands as a renowned Healthcare Services Provider in Central Florida. They are known for providing quality care and personalized attention to their patients. They follow a customer-centric approach to meet patients' healthcare needs by keeping a focus on affordability and patient satisfaction.

The Need of CRM for a Connected Healthcare Experience

The client was looking for an integrated healthcare experience for its patients, employees, and care providers. Before partnering with Damco, the client relied on manual processes and spreadsheets to record useful data such as marketing leads, patient surveys, and appointment schedules. The complete process was prone to errors and overwhelming for their employees. They realized the need for a CRM that could help them capture and track their marketing leads, run successful campaigns, allow hassle-free appointment scheduling, and automate post-appointment communication such as surveys and upcoming patient visits.

Without a centralized platform, managing patient data and keeping it updated with the latest information was a difficult task for the client. They wanted to have a seamless flow of information between their existing EMR and the new CRM solution to have a complete patient view to allow healthcare providers give all the critical care their patients need.

To understand the exact business requirements and provide constructive recommendations, they wanted the CRM partners to work closely and scrutinize the ongoing workflow. They wanted to ensure that the implementation is done after considering all the significant customization, automation, and integration requirements.

CHALLENGES



Manual management of Leads and Campaign data points



Patient data maintained in silos without any direct integration with EMR system



Time-consuming appointment scheduling for customers due to several layers involved



Lack of automation leading to human errors and work duplicity



No or tedious post-appointment patient surveys and feedback



Difficult process to maintain patient enrollments data for supported Healthcare Plans

The Solution – A Custom Salesforce® CRM Solution

Damco's team worked closely with the client and their different business teams to understand their work process and outline development and implementation strategies. After thorough consideration, the team zeroed in on implementing a customized Salesforce® CRM solution. The implemented CRM harmonizes with their every automation need and functional requirement.

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The CRM seamlessly integrates with their existing EMR to enable a single view of the patient data for the healthcare providers. It facilitated the customers to easily book appointments and get better access to the required services such as patient reports. The careful segregation of user access ensures data privacy and client's compliance with HIPAA. The CRM implementation also helped in automating all the important business processes to reduce human interventions and improve customer satisfaction. Furthermore, centralizing data helped the client eliminate redundancy, the duplicity of work, and human-prone errors.

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The client can now easily run marketing campaigns, schedule appointments, manage enrollments and run post-appointment surveys – all through a single platform. For an integrated and coordinated calling experience, Damco's team enabled computer telephony integration (CTI) as well with the shortlisted partner. This helped them maximize efficiency and measure key performance indicators such as first-call resolutions and dropped-call percentages. An SMS gateway integration was also done to facilitate offline post-appointment surveys for patients.



Value Delivered – Maximizing Efficiency and Fostering Better Customer Relations

After implementing the CRM solution, the client could realize the following changes:

- ▶ Improved lead management and enrollments closure with streamlined campaign management
- ▶ A single view of patient data to enable easy collaboration for healthcare teams
- ▶ Hassle-free appointment scheduling and faster access to services for improved customer experience
- ▶ Highly efficient calling and support process due to CTI integration
- ▶ Automated processes to increase operational efficiency and eliminate errors
- ▶ Better customer service and retention through post-appointment surveys and feedback



Learn more about the deployed solution and how something similar can benefit your practice!

Book a Free Consulting Session

About Damco

Damco Solutions is a strategic Salesforce partner and holds consulting and technology expertise across the Salesforce ecosystem. Damco helps businesses boost productivity and realize the true potential of their Salesforce platform to maximize their investments. Contact Damco to learn more about the services and solutions that can help transform and build a customer-centric digital-first organization.

Contact us for more information on Damco's Salesforce Services.

+1 609 632 0350

info@damcogroup.com

www.damcogroup.com/salesforce/