



HEALTHCARE CRM

ASSESSMENT GUIDE

Unlock the Full Potential of Your Organization with a Healthcare CRM

Introduction Are you considering a Healthcare CRM to streamline operations and enhance patient care? This assessment guide will help you evaluate your current systems and identify key areas where a Healthcare CRM can make a significant impact.

Section 1: Understanding Your Current Systems

1. Inventory of Existing Tools

- List your current tools and systems (EHR, billing software, scheduling tools, etc.).

- Identify any gaps or inefficiencies in your current setup.

2. Integration Capabilities

- Assess how well your current systems integrate with each other.

- Note any integration challenges you face.

Section 2: Identifying Key Challenges

1. Clinical Complexity

- How do you currently manage fragmented technical systems and regulations?

- What challenges do you face with different business practices across locations, managing provider preferences, while supporting fairness across providers?

- What operations issues are present with patient insurance/RCM, present symptoms, and safety?

2. Operational Efficiency

- Evaluate your current workflow for scheduling, triaging, and managing patient interactions. (What are major call types? Which ones convert to appointments? Which ones are the most expensive?)

- Identify bottlenecks and areas for improvement.

Section 3: Evaluating Patient and Provider Experience

1. Patient 360 View

- Do you have a comprehensive view of each patient’s medical history, appointment history, and interaction data?

- How personalized and consistent is the patient experience across different touchpoints?

2. Provider 360 View

- Assess how well you track provider preferences, specialties, and performance metrics.

- Identify any gaps in supporting providers with relevant data and resources.

Section 4: Assessing CRM Features

Standardized Call Management

- Ability to capture and categorize call types
- Call scripts & guided workflows for common tasks
- Automated call support based on type and urgency
- Clinical safety protocols
- Real-time dashboards with key metrics

Cross-Department Coordination

- Shared task lists
- Accommodation for department and location variations
- Provider Preference Management
- Customizable queues with task rules
- Automated notifications across departments
- QA and score each encounter
- Comparative analytics for staff coaching

Technology Consolidation

- Integration with Electronic Health Records (EHR)
- Integration with other critical healthcare software
(telephony, Practice Management, etc.)
- Integration with billing & price transparency

AI-Driven Omnichannel Capabilities

- Multi-channel patient engagement (phone, email, chat, mobile apps)
- Tailored multi-channel workflows (refill requests, referrals, call deflection)
- Platforms for consistent patient education
- Care continuity across locations & home

Market Expansion & Engagement

- Tools for patient acquisition through targeted marketing
- Personalized communication tools
- Comprehensive patient histories and care plan tracking

Healthcare-Specific Data & Automation

- No-code Workflow Customization
- Natural Language Symptom Checker
- Nurse Triage system
- Intelligent Scheduling
- Patient Self-Service
- Referral Service
- Patient Education & Support Materials

Advanced Analytics

- Custom report building for non-technical users
- Revenue forecasting capabilities
- Marketing campaign analysis tools
- Operations planning and resource allocation features

User Experience, Support & Training

- Intuitive interface for staff
- Comprehensive training resources
- Ongoing technical support
- Regular updates and improvements

Section 5: Additional Considerations

1. Potential ROI

- Estimate potential improvements in patient care and operational efficiency.
- Calculate potential revenue optimization from reduced scheduling errors and missed appointments.

2. Implementation Costs

- Assess the cost of implementing a Healthcare CRM.
- Consider the long-term benefits and savings.

3. Emerging Technologies

- Identify emerging trends like AI-driven analytics and predictive modeling.

4. Scalability

- Assess the scalability of potential CRM solutions to grow with your organization's needs.

Section 6: Vendor Comparison

1. Score Vendors

- Compare leading healthcare CRM vendors based on key features and integration capabilities.

| | | | | |
|----------------|----------------|--|--|--|
| Vendor Product | Keona-CareDesk | | | |
| Score | | | | |

2. Vendor Fit

- Determine which vendor aligns best with your organization's needs and goals.

Section 7: Future Prospects and Trends

Conclusion A well-implemented Healthcare CRM can revolutionize your patient care and operational efficiency. Use this assessment guide to identify areas of improvement and choose the right CRM solution for your healthcare organization.

Next Steps

- Schedule a consultation with our experts.
- Download our detailed comparison guide of top healthcare CRM vendors.
- Explore case studies and success stories of organizations like yours.

About Us Keona Health develops innovative software solutions to improve communication in the healthcare industry. Our flagship product, CareDesk, is a comprehensive Healthcare CRM and Telehealth platform designed to provide the best care to patients and superior tools for healthcare providers.

For more information, visit www.keonahealth.com.

Contact Us Have questions or need further assistance? Reach out to our team:

- Email: support@keonahealth.com
- Phone: (919) 246-8520
- Address: 510 Meadowmont Village Circle, Ste 250, Chapel Hill, NC 27517