

Summer Internship Report  
at  
C K Birla Hospital  
(April 22nd to June 21st , 2024)

A Report

By  
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PGDM (Hospital and Health Management)

2023-2025



International Institute of Health Management Research, New  
Delhi

## **INTRODUCTION**

- The CK Birla Hospital is part of the \$2.4 billion diversified CK Birla Group. The Birlas have been committed to the cause of nation-building and serving it for close to 160 years.
- The Gurgaon hospital is led by an experienced team of over 100 specialists. This hospital is a proud partner to thousands of happy families & patients and continues to offer international standards of clinical care with a robust focus on safety, integrity and compassion. This hospital relies on both international and national guidelines & protocols of healthcare delivery and brings world-class care closer to home.

## **VISION, MISSION & PROPOSITION**

### **VISION-**

Aspire to transform the future of healthcare through outstanding clinical outcomes, research, education and compassionate care.

### **MISSION-**

We are committed to bringing global standards of clinical expertise and care to patients and their families

### **PROPOSITION-**

- \* Deliver global standards of clinical quality
- \* A promise of service excellence
- \* Integrity in healthcare delivery

## **ORGANIZATIONAL STRUCTURE**

- \* Vice Chairman- Akshat Seth
- \* Chief Business Officer- Vipul Jain
- \* Vice President, Supply Chain Management- Rashmi Chawla
- \* Deputy General Manager, Service Excellence- Disha Arora
- \* Vice President, People Function- Shefali Tomar
- \* Vice President, Medical Services- Dr. Samir Singh
- \* Vice President, IT- Binod Madhab Samal
- \* Assistant Vice President, Branding & Communication- Dr. Davy Jindal
- \* Director, Finance- Shridhar Toshniwal

## **ACKNOWLEDGEMENT**

The successful completion of this study would not have been possible without invaluable contributions of several individuals and the support of following organization.

C K Birla Hospital- I would like to express my sincere gratitude to C K Birla Hospital for providing me the opportunity to conduct this study.

Special thanks to Dr. Davy Jindal and Ms. Shivani Malhorta for their contribution, guidance, mentor ship and technical assistance.

I am also grateful to be a part of such an incredible group and want to thank team for their hard work and dedication.

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# **PROJECT REPORT**

## **TITLE OF THE PROJECT**

Development and deployment of focused patient engagement funnels through CRM (Customer Relationship Management)

## **AIMS AND OBJECTIVES**

- \* Improve the patient's journey
- \* Increase patient's retention
- \* Lower patient's acquisition cost
- \* Improve operational efficiency
- \* Improve patient's satisfaction
- \* Expand Patient's base
- \* Building long term relationship with patients

## **ABBREVIATIONS/ACRONYMS**

- \* CRM- Customer Relationship Management
- \* Interactive Voice Response -IVR

## **MODE OF DATA COLLECTION**

### **\* CRM System Data:**

Patient Demographics: Basic information like name, age, location, contact details, insurance information etc. can be collected during initial patient on boarding and updated regularly.

Appointment History: Track patient interactions including appointment scheduling, cancellations, no-shows, and reasons for visits.

Treatment Plans and Medical History: Record details about diagnoses, medications, treatment plans, allergies etc.

Communication History: Capture interactions with patients through phone calls, emails, texts, and chat logs within the CRM.

### **\* Patient Interactions:**

Website Forms and Surveys: Embed website forms or surveys to collect patient feedback on their experience, health concerns, or interest in specific services.

Interactive Voice Response (IVR): Use IVR systems during appointment scheduling or appointment reminders to collect data through voice responses.

### **\* External Data Sources:**

Claims Data: Integrate with insurance providers to obtain claims data which can reveal treatment trends and identify patients who may need additional support.

Public Health Data: Utilize anonymized public health data sources (with proper permissions) to understand patient demographics and health trends in the local area.

### **\* Wearable Devices and Apps:**

Integrate with patient-authorized wearable devices or health apps to collect data on activity levels, vitals, or medication adherence.

Data collection for patient engagement funnels should be mindful of patient privacy and HIPAA regulations. Always ensure informed consent is obtained before collecting any patient data.

## **Critical factors affecting the functioning of the department**

### **\* Internal factors-**

#### **Data Quality and Accessibility-**

Accurate and accessible patient data is the foundation of everything. It allows for proper segmentation and personalization within the funnels, ensuring the right messages for the right messages reach the right patients. Dirty or inaccessible data can lead to irrelevant outreach and hinder engagement.

#### **CRM system capabilities-**

The CRM system itself plays a big role. A robust CRM with the features like automation for tasks, progress tracking and results measurement can significantly improve efficiency. If the CRM lacks functionalities, it can slows down funnel development and deployment.

#### **Departmental Expertise-**

The staff's knowledge and expertise are crucial. They need to understand the CRM functionalities, funnel design best practices and patient engagement strategies.

#### **Workflow and collaboration-**

Clear workflows and seamless collaboration between departments are essential. When everyone involved understands their roles and communicates effectively, it ensures smooth execution of the funnels and a more cohesive patient experience.

### **\* External factors-**

#### **Patient behavior and preferences-**

Understanding how patients behave and their preferred communication channels is key. Knowing what information they seek, when they want it, how they prefer to receive it(email, text message, phone call) allows for targeted outreach within the funnel. Ignoring patient preferences can lead to frustration and disengagement.

#### **Market competition-**

The healthcare landscape is competitive, and patient attention is valuable. Well-designed funnels that stand out with clear value propositions and relevant content are more likely to capture patient interest and drive engagement.

Regulatory compliance- Healthcare regulations can impact how patient data is used and communicated with within the funnels. Staying on top of regulations and ensuring compliance is crucial to avoid legal issues and maintain patient trust.

By considering these internal and external factors, the department can develop and deploy focused patient engagement funnels through the CRM that are effective, efficient and compliant.

## **Conclusive learning, limitations and suggestions for improvement**

### **Conclusive learning**

#### **Designing Effective Funnels-**

Segmentation- Segmenting the patient's base by demographics, health conditions and engagement history allows for targeted messaging and interventions. This personalization can significantly improve response rates.

#### **Content Optimization-**

Craft compelling content that resonates with each patient segment. Address their specific needs, concerns and interest at each stage of funnel.

#### **Multi-channel Approach-**

Including clear and concise calls to action at each stage of the funnel, guiding patient towards the desired outcome.

#### **Clear Calls to Action-**

Including clear and concise calls to action at each stage of the funnel, guiding patients towards the desired outcome.

Eg. Appointment booking, medication adherence, preventive care reminders

### **Limitations**

#### **\* Data limitations-**

Traditional CRM's are primarily designed for sales and marketing, and may not capture the specific healthcare data needed for patient engagement. This could include appointment history, treatment plans, medication adherence and patient reported outcomes.

#### **\* Segmentation capabilities-**

Segmenting patients based on their unique needs and demographics might be limited in a CRM. Advanced healthcare CRM systems might offer some segmentation features, but they may not be as sophisticated as dedicated patient engagement platforms.

#### **\* Engagement channel limitations-**

CRMs typically focus on email and phone communication. however, effective patient engagement often required a multi-channel approach that includes text messaging, appointment reminders, educational content and patient portal access. Integrating these channels with a CRM can be complex.

#### **\* Regulatory compliance-**

Healthcare data is subject to strict regulations like HIPAA. CRM's might not have the built-in security and compliance features required for handling sensitive patient information.



## **Suggestions for improvement-**

### **\* Content and Messaging**

**Multi-channel engagement-** Utilize various channels like email, SMS and in-app notifications to reach patients as their preferred touch points within the funnel.

**Personalized content-** Personalized communication with the funnel using patient data.  
Eg. Address patient by name and tailor content to their specific health concerns.

**Interactive content-** Integrate interactive elements like surveys, quizzes or appointment scheduling tools within the funnel to boost engagement.

### **\* Data and Segmentation**

**Rich patient profiles-** Leverage CRM to build comprehensive patient profiles that include demographics, health history, preferences and communication channels. This allows for targeted messaging and content.

**Segmentation and personalization-** Segment patients based on their needs, interests and engagement levels. Tailor content and communications within the funnel for each segment to increase relevance and effectiveness.

**Automated Triggers-** Set up automated triggers based on patient actions or milestones within the funnel.

**Performance Tracking-** Monitor key metrics like open rates, click-through rates and conversion rates to track the effectiveness of your funnels and identify areas for improvement.

# **Key steps involved in leveraging data for building and implementing targeted patient engagement funnels using a Customer Relationship Management (CRM) system**

## **\*Data Compilation:**

**Identify Data Sources:** Compile relevant patient data from various sources within the healthcare organization's CRM system. This might include: Demographics (age, gender, location) Medical history (diagnoses, procedures, medications) Appointment history (scheduling, cancellations, no-shows) Communication history (phone calls, emails, online interactions) **Data Integration and Cleaning:** Ensure data consistency and accuracy across different sources. This may involve: Identifying and addressing missing values or inconsistencies. Standardizing data formats (e.g., date formats, terminology). Merging data from various sources into a unified patient profile.

## **\* Data Analysis:**

**Segmentation:** Group patients into relevant segments based on their characteristics, needs, and behaviors. This could involve segmenting by: Diagnosis or treatment type Risk factors or health conditions Engagement level (high, medium, low) Preferred communication channels (email, SMS, phone) **Identify Trends and Patterns:** Analyze the compiled data to identify trends and patterns related to patient engagement. This might involve: Examining appointment scheduling patterns and cancellation rates. Analyzing communication channel preferences and response rates. Identifying factors influencing patient adherence to treatment plans.

## **\*Interpretation and Funnel development:**

### **Develop Patient Personas:**

- \* Create detailed profiles representing different patient segments, considering their: Needs and challenges
- \* Preferred communication styles Motivations for engagement
- Design Targeted Funnels:** Based on the analysis and patient personas, design multi-step funnels within the CRM to nurture patient engagement.
- \* Each step in the funnel should: Deliver targeted messages tailored to the specific segment.
- \* Utilize the preferred communication channels for each segment. Guide patients towards a desired action, such as appointment scheduling, medication refills, or preventive care reminders.

## **Deployment and Monitoring:**

**Implement Funnels within CRM:** Develop and deploy the designed funnels within the CRM system.

This might involve:

- \* Automating tasks like sending targeted messages based on triggers or criteria. Integrating the funnels with existing communication workflows.
- \* **Track and Monitor Performance:** Continuously monitor the performance of the funnels to assess their effectiveness.
- \* Analyze metrics such as: Open rates and click-through rates for communications.
- \* Appointment scheduling rates following outreach.
- \* Patient feedback on the communications and engagement strategies.

\* **Refine and Optimize:** Based on the monitoring results, refine the funnels and messaging to improve their effectiveness over time.

By following these steps and leveraging data effectively, healthcare organizations can develop and deploy focused patient engagement funnels through their CRM systems. This can lead to improved patient outcomes, increased patient satisfaction, and better overall healthcare delivery.

## **Recommendation and Conclusion**

### **\* Focused Patient Engagement Funnels through CRM Recommendation:**

Develop and deploy focused patient engagement funnels through a customer relationship management (CRM) system to improve patient outcomes and satisfaction.

**Segment Patients:** Utilize the CRM's patient data to segment patients into distinct groups based on demographics, health conditions, and engagement history. This allows for targeted communication.

**Develop Targeted Content:** Create specific content tailored to each patient segment's needs and interests. This could include educational materials, appointment reminders, preventative healthcare tips, and personalized wellness programs.

**Multi-Channel Engagement:** Leverage the CRM's communication tools to deliver content through multiple channels preferred by patients, such as email, SMS, and the patient portal.

**Automate Workflows:** Automate tasks within the CRM to streamline communication and personalize the patient journey. This includes automated appointment reminders, birthday greetings, and follow-up messages after consultations.

**Track and Analyze:** Continuously monitor and analyze patient engagement data within the CRM. This allows us to assess the effectiveness of the funnels and make data-driven adjustments to optimize results.

## **Benefits:**

- \* Improved patient adherence to treatment plans
- \* Increased patient satisfaction and loyalty
- \* Early identification of potential health issues
- \* Enhanced preventive care measures
- \* Streamlined communication and workflow for healthcare providers

## **Conclusion:**

- \* Implementing focused patient engagement funnels through a CRM offers a strategic approach to improve patient outcomes and cultivate stronger patient-provider relationships.
- \* By leveraging patient data for segmentation, personalized content creation, and multi-channel communication, healthcare organizations can significantly enhance the patient experience and achieve better overall health outcomes.

## **Further Development:**

- \* Integrate the CRM with other healthcare IT systems for a more holistic view of patient data.
- \* Utilize artificial intelligence (AI) for advanced patient segmentation and content personalization.
- \* Explore the use of chat bots within the CRM to provide patients with 24/7 support and appointment scheduling options.
- \* By continuously developing and deploying these funnels, healthcare organizations can stay ahead of the curve in patient engagement and deliver exceptional care.

**Annexure:**

<b>S. No</b>	<b>Name of the Department</b>	<b>Date of visit</b>	<b>% of Time Spent</b>	<b>Interacted with (Name and Designation)</b>
1)	Breast Cancer	02-May-24 03-May-24 06-May-24	1.5hrs	Dr. Rohan Khandelwal (Breast Cancer Surgeon)
2)	Obstetrics & Gynaecology	10-May-24 13-May-24 14-May-24	1.5hrs	Dr. Astha Dayal (Gynaecologist)
3)	Oncology	21-May-24 22-May-24	1hr	Dr. Vineet Kaul (Oncologist)
4)	Neonatology & Paediatrics	21-May-24 22-May-24 27-May-24	1hr	Dr. Saurabh Khanna (Pediatrician)
5)	Neonatology & Paediatrics	29-May-24 30-May-24 31-May-24	1hr	Dr. Poonam (Pediatrician)
6)	Neonatology & Paediatrics	02-June-24 03-June-24 04-June-24	1hr	Dr. Shreya Dubey (Pediatrician)
7)	Obstetrics & Gynaecology	04-June-24 05-June-24 06-June-24	1hr	Dr. Aruna (Gynaecologist)
8)	Orthopedics	10-June-24 12-June-24 15-June-24	1.5hrs	Dr. Ashwani Maichand (Orthopedic Surgeon)
9)	Oncology	10-June-24 11-June-24 12-June-24	1hr	Dr. Vinay Gaikwad (Oncologist)
10)	Oncology	10-June-24 17-June-24 18-June-24	1hr	Dr. Pooja Babbar (Oncologist)



## Certificate of Approval

The Summer Internship Project of titled “**Development and deployment of focused patient engagement funnels through CRM (Customer Relationship Management)**” at C K Birla Hospital, Gurugram is hereby approved as a certified study in management carried out and presented in a manner satisfactorily to warrant its acceptance as a prerequisite for the award of **Post Graduate Diploma in Health and Hospital Management** for which it has been submitted.

It is understood that by this approval the undersigned do not necessarily endorse or approve any statement made, opinion expressed, or conclusion drawn therein but approve the report only for the purpose it is submitted.

**Name of the Mentor**  
**Designation**  
**IIHMR, Delhi**

**CK Birla Healthcare Pvt Ltd**

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CIN No. U74140DL2014PTC272562



(Completion of Summer Internship from C K Birla Hospital,  
Gurugram)

The certificate is awarded to

Name- Aman Gulati

In recognition of having successfully completed his/her  
Internship in the department of Marketing and Branding

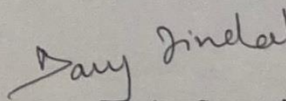
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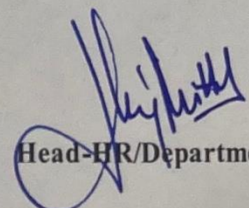
and has successfully completed <sup>his</sup> her Project on  
Development and deployment of focused patient engagement funnels through CRM  
(Customer Relationship Management)

Date- 21-Jun-24

Organisation- C K Birla Hospital, Gurgaon

He comes across as a committed, sincere & diligent person who has a  
strong drive & zeal for learning  
We wish him/her all the best for future endeavors

  
Organization Supervisor

  
Head-HR/Department Head



CKBH/TC/2024/04

June 21, 2024

TO WHOMSOEVER IT MAY CONCERN

This is to certify that Mr. Aman Gulati has successfully completed his training from April 21, 2024, to June 21, 2024, in Branding & Marketing department of CK Birla Healthcare, Corporate Office.

During the period of his training with us, his performance was good and he was found punctual, hardworking, and inquisitive. He was present every day during his training in the Corporate Office.

Any information used to complete the project is the intellectual property of CK Birla Healthcare Pvt. Ltd. and hence should not be used for any other purpose.

We wish him all the very best for his future endeavors.

For, CK Birla Healthcare Pvt. Ltd.

**Jalaj Mittal**  
Assistant General Manager - Human Resources

25/06/24

CK Birla Healthcare Pvt Ltd

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## FEEDBACK FORM

(Organization Supervisor)

Name of the Student: Aman Gulati

Summer Internship Institution: CK Birla Hospital, Gurgaon

Area of Summer Internship: Gurgaon, Haryana

Attendance: 100 %.

Objectives met: Created CRM engagement plan for Key doctors at CKBH. The plan addresses patient concerns, educational content, self-care tips and doctor requirements.

Deliverables: Videos, creatives and text messages which will be sent to patients.

Strengths: Enthusiastic  
good ppt skills  
summarizes a brief well into, <sup>concise</sup> output

Suggestions for Improvement: multi-tasking  
clarity in communication

Shivani  
(SHIVANI MALHOTRA)

Signature of the Officer-in-Charge (Internship)

Date: 18 Jun 2024

Place: Gurgaon

## gulati Aman ST

### ORIGINALITY REPORT

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