

Counsellor App

Objective

Counsellor App enables counsellors/staff to engage with patients assigned to them for specific tasks/workflows.

It enables the counsellors to

1. Physically meet the patients and update the corresponding tasks
2. Call patients directly from the App
3. Send templated messages through SMS/Email/WhatsApp.

All relevant patient details like their health records, transaction details, etc. are available in the Counsellor App for personalized engagement.

The top use-case for Counsellor App is Post OP conversion for high-ticket items such as surgery, procedure, etc.

Target User Persona(s)

Counsellors/Converter/Educators engaging with patients (non-call center agents)

Key features

1. Counsellor app helps to convert opportunities generated from different sources:
 - a. EMR (Integrated for Admission, radiology, lab, medicine etc. customizable as per client requirement)
 - b. Manual Prescription (App integrates with HIS to capture every patient billed for OPD and counsellors can upload prescription images of corresponding tasks which helps capture post OP services conversion)
2. Prioritization' and 'Assignment' of Tasks
 - a. Hospital can categorize tasks based on parameters such as prescription potential, high-value procedures, etc. to prioritize these tasks for focused conversions
 - b. Hospitals can Assign tasks based on parameters such as task type, prescription potential, etc. to assign tasks to different counsellors
 - c. Often counsellors are assigned basis specialty or specific doctors
3. Workflow - Post OPD patient is assigned to a counsellor and every service prescribed in his prescription is created as a task
 - a. Against every task agent is supposed to mark disposition (converted, denied, follow-up, etc.)
 - b. If a follow-up is marked against a task, then the app generates a reminder notification on the follow-up date and time
 - c. Counsellor can also send templated SMS/Email/WhatsApp to the patients for proactive engagement, this is especially useful in case of elective surgeries where patient takes longer time to decide
4. App has a high ROI impact by improving the conversion rate across services such as surgeries, radiology, etc.
5. **Specific Use-case:** Capturing patient leads in offline mode (e.g.: health camps, etc.)
For a use-case where patient information needs to be captured without active internet connections (e.g.: camps in remote areas), Counsellor app is also available in offline mode to capture these opportunities (aka Peripheral App)

6. **Analytics and Reporting**

A separate dashboard is available for detailed analytics and reporting which tracks key business metrics such as conversions per counsellor, conversion per doctor, etc. which should be actively discussed/reviewed with the hospital decision makers (suggested a quarterly review)