

Analysis of Existing Internal Tracking System and Designing and Implementation of New Tracking System in Equipment Department.

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Introduction

- *Electronic management and storage Problem Areas :*
 - ✓ Incomplete coverage of Operational parameters.
 - ✓ Increasing Volume and range of Information
 - ✓ Technical glitches.
 - ✓ Increase level of risk
 - ✓ Cost related to external agencies for scanning.



Internal Tracking system

Proactive approach for
Governance & Compliance

Mapping of internal
issues.

- ***Research Question:***

- ✓ How to improve existing internal tracking system in Medical equipment department in Portea homecare.

- ***Objectives :***

- ✓ To identify the gaps in Existing Internal tracking system.
- ✓ Designing and Implementation of new internal tracking system.

- ***Research Design:***

- ✓ **Study Type** : Descriptive Study.
- ✓ **Area of Study** : Equipment Department, Portea Bangalore.

- ***Tools and Techniques*** : Phases wise Focus group & Informal discussions.

Existing Internal Tracking system

Sr No	Patient Name	Sales Channel	Address	Equipment	Unit	Rental start	Contact no.	Rent Amount	Paid Till	Effective days in the month	Effective Revenue	Sold
	Sheily Srinivasa	CA YSP	cross, Malleshwaram, Bangalore - 55	O2- Concentrator	1	07-02-2014	9845162491	4000	03-01-2016	1	133.3333333	
	kapil m	MHB	no 96,1b-1st floor 28th main,7th cross hsr lay out	back rest cot	1	24/2/2015	9731167112	2000	23/3/2016	23	1533.333333	
		MHB		Foam bed	1	24/2/2015		500	23/3/2016	23	383.3333333	
	bharathi patnaik	CA Hebbal	apartment horamavu babusupalaya	suction appartus	1	03-05-2015	9845186280	1000	03-09-2016	9	300	
	Lilly S	portea Referrals	#415, 6TH BLOCK 6TH CROSS KORAMANGALA, NEAR MUST KALANDAR INDOOR STADIUM	O2 Concentrator	1	23/6/2015	9902096744	4000	27/3/2016	27	3600	

Gaps in existing internal tracking system

Revenue:

- Live update on revenue,
- Rental/sales/pending.
- Revenue – Product line, Lead Source

Product line:

- Defined Product lines.
- Utilization and requirement of equipments city wise.

Coverage :

- Customer information.
- Mapping of all transactions.
- Live update of lead or Order pan India.
- Accountable staff

New Tracking System: Categories

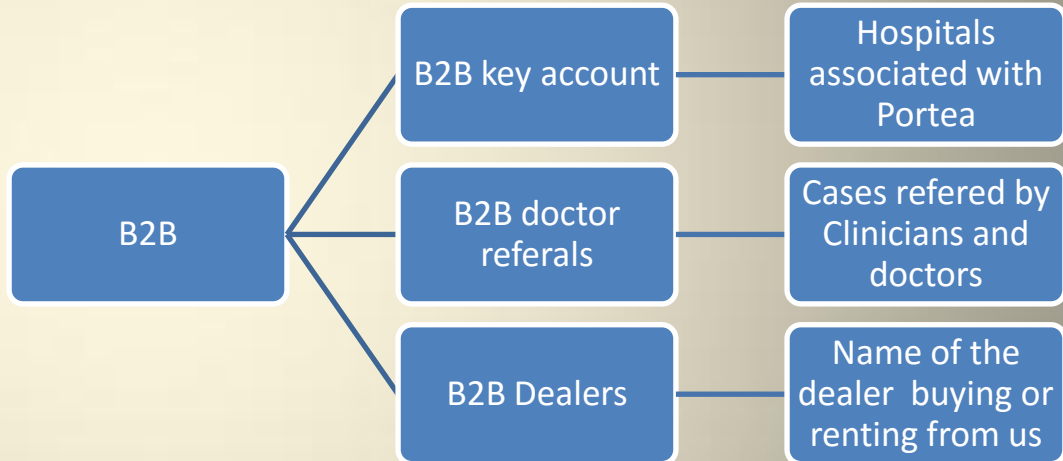
<i>Customer Basic Information</i>	<i>Sales Information</i>	<i>Equipment Information</i>	<i>Rental/sales delivery process</i>	<i>Return & Refund process</i>
Date & time of request.	Lead Source	Lead status:	Gate pass no	Pick up request date
Patient/customer name	Key account/dealer/doctor referral name	Lead category	Date & time of delivery.	Assigned to
Address	IP or OP	Assigned to	PR no	Pick up date
Contact No	Sales Executive	Equipment category	Payment mode	GRN no
Customer ID	Equipment requested	Product source	Rent :days/month	Refund amount
Email	Rental/sales/carry over	Third party vendor	Rental start date	Payment mode
Bank details	Converted :yes/no	Product name	Rental End date	Payment reference no
	Date & time :committed	Brand/Model/Serial No	Collected rental amount	Remarks
			Security deposit	
			Sales amount	
			Warranty	
			Total amount	

• Customer Basic Information:

Customer Basic Information

Sr No	Date	Time	Patient Name	Address	Contact no.	Customer Id	E mail	Customer Bank Details
1	5/2/2016	1:00	rajendra shroff	28, Asopalav baung	9824000463			

• Sales Information :



Sales Information

Lead Source : B2B/B2C/Dealers (if B2B - Key account name or Doctor Referral or Dealer)	Key Account/Dealer/Do ctor Refereal name	If B2B, IP /OP	Sales Excutive(name)	Equipment Requested	Rent/Sale/Rental carry over	Converted:yes/no	Committed Delivery Date	Committed Delivery Time
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• *Equipment Information:*

Equipment Information										
Lead Status	Lead Category:Critical/semicritical/non critical	Assigned to (Service Executive/Equipment coordinator/SM E)	Assigned to(name)	Equipment :Category	Product source :Third party/HVPL/Me dibiz	Third party vendor name	Product name	Brand	Model name/Number	Serial no/ID

• *Product Lines for Equipment:*

Respiratory & Sleep

- Oxygen Concentrator
- Portable Oxygen Concentrator
- BiPAP/Non Invasive Ventilator
- ICU Bed (Motorized)
- Syringe Pump
- Infusion Pump
- Suction Apparatus
- CPAP
- Masks , Accessories
- Sleep-Diagnostic test
- Snoring relief products
- Sleep Inducing Devices
- MAD/Oral appliances

Mobility & Geriatric

- Hospital Beds
- Air Mattresses
- Manual Wheelchair
- Commode Chair
- Scooter
- Over-bed Table
- shower chair
- Hearing aids
- 24-hr Ambulatory BP Monitor
- 24-hr Holter Recorder
- ICU Bed (Motorized)

- Rental/sales Delivery process:***

Rental/Sales Delivery Process													
Gate pass no	Date of Delivery	Time of Delivery	Delivery Note No	PR No	Mode of payment cash/Cheque/DD/NEFT	Rent rate- (Days/month)	Rent Start Date	Paid Till/End date	Collected rental amount	Security Deposit	Sales amount	Manufacturer's Warrant y(in months/years)	Total amount

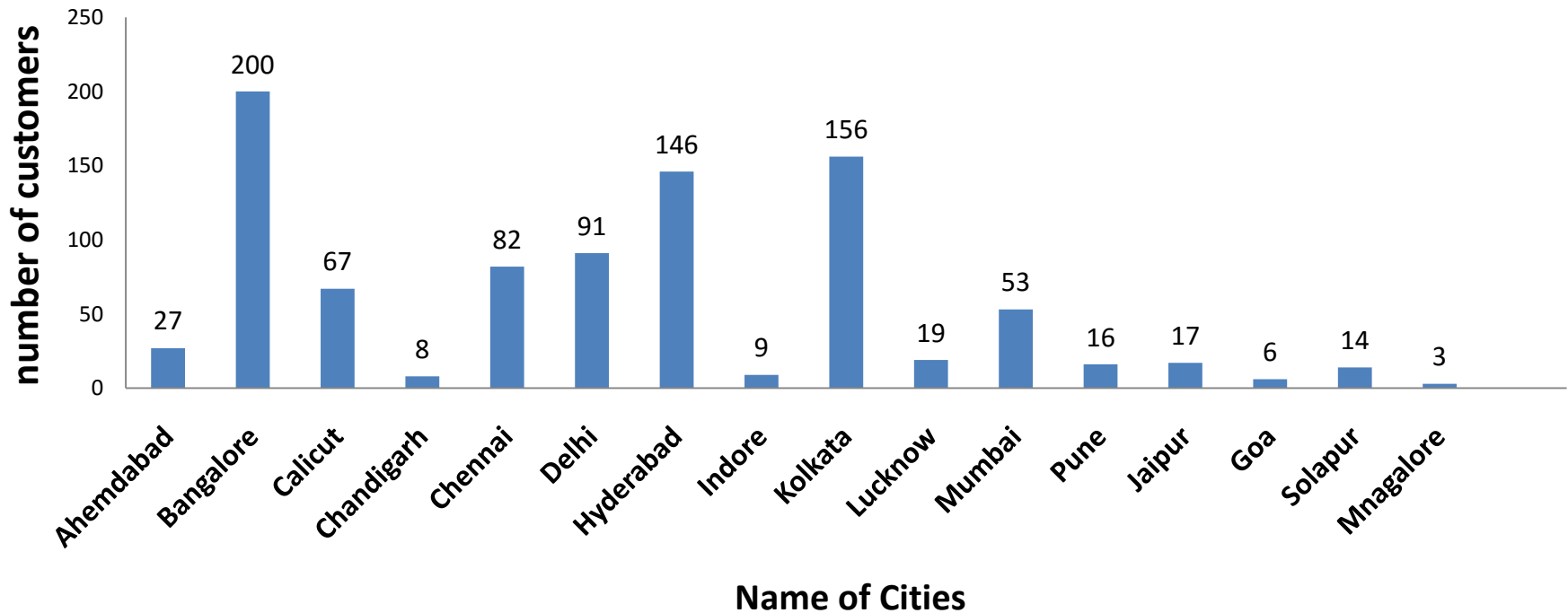
- Return & Refund Process:***

Equipment Return & Refund Process							
Pick up Request Date	Assigned to	Pick up Date	GRN No	Refund Amount	Mode of payment cash/Cheque/DD/NEFT	Payment Reference No	Remarks

- ***Implementation of New Tracking system:***

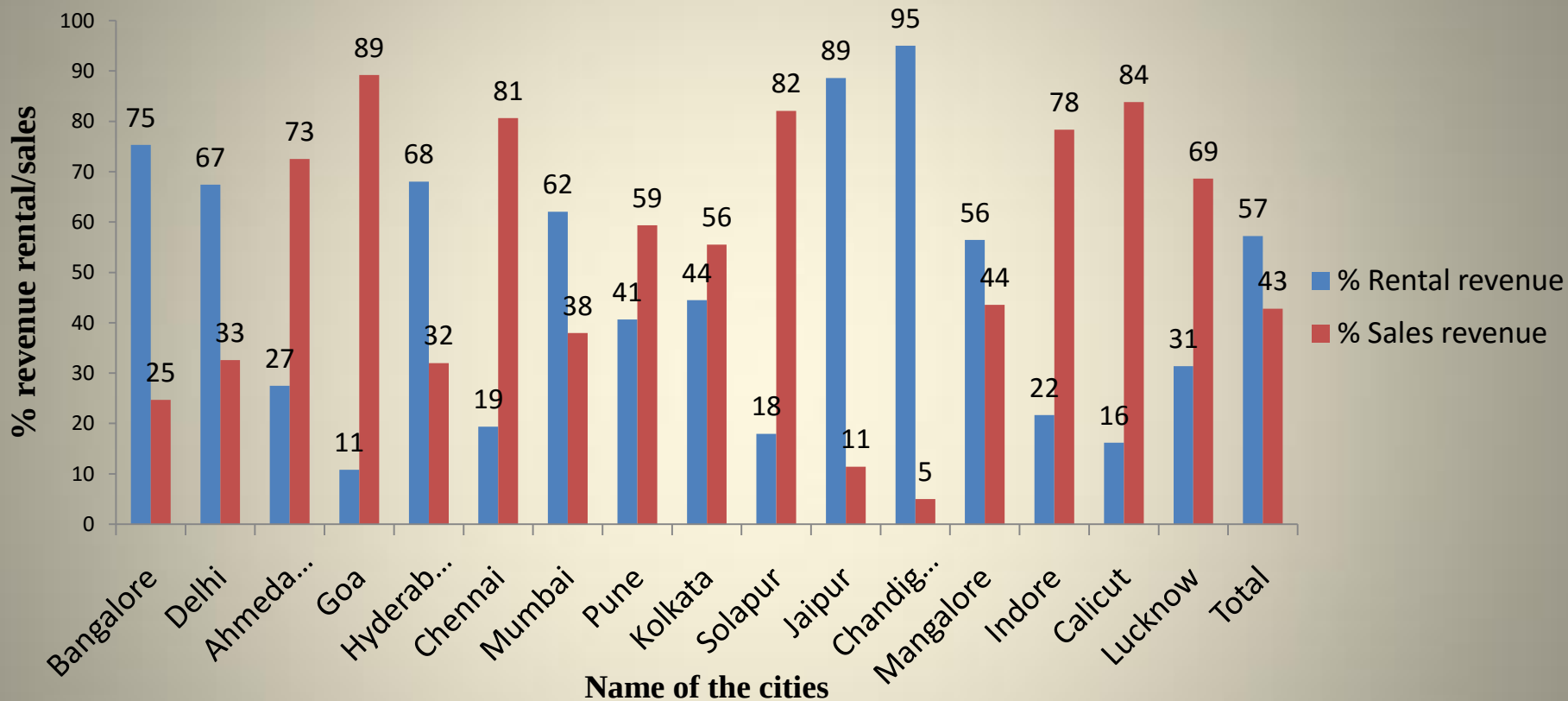


Total Number of Customers (City wise)



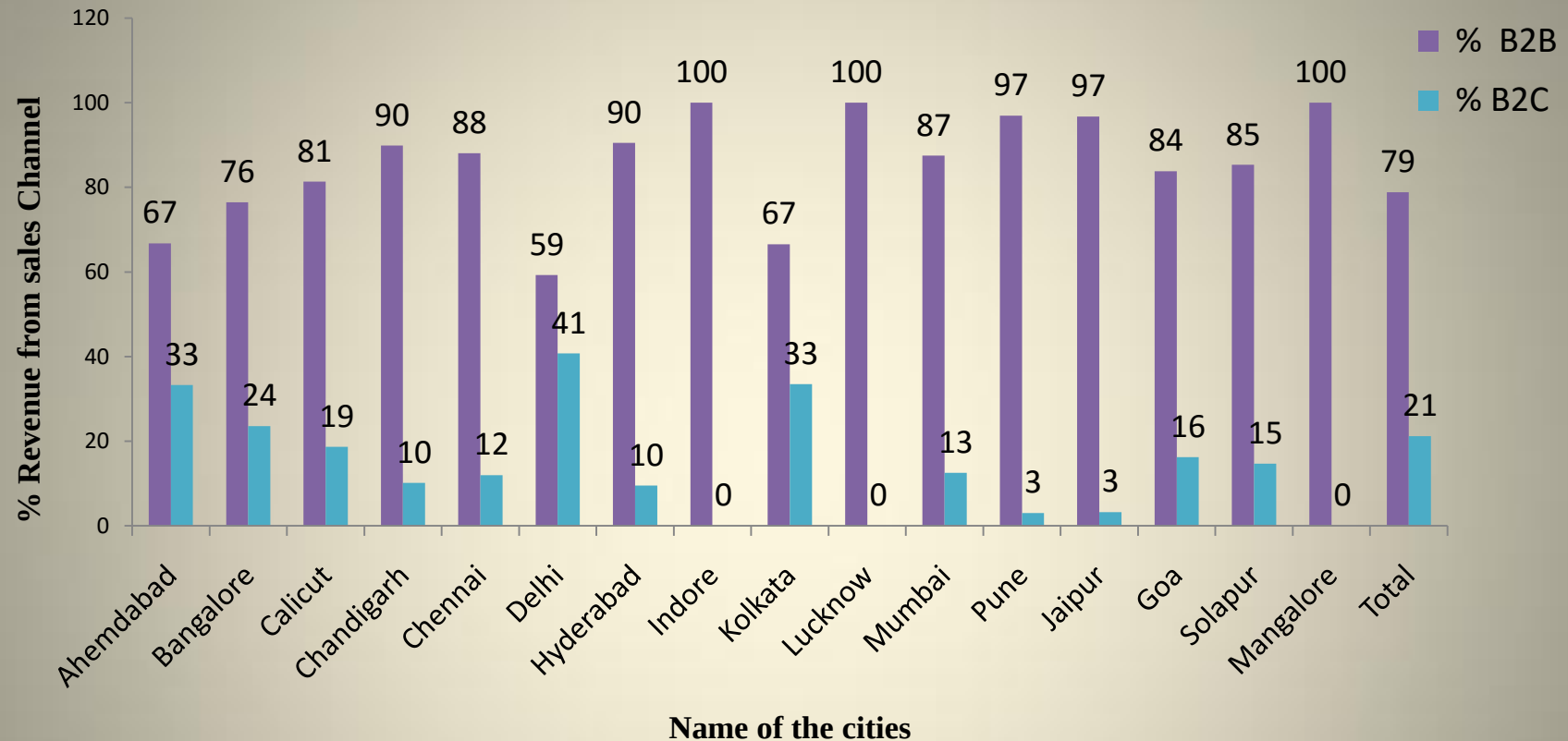
- ✓ Total number of customers captured from tracker are 914 Pan India.
- ✓ Majority of customers are from metro cities as compare to smaller cities.

Overall revnue-Rental/sales



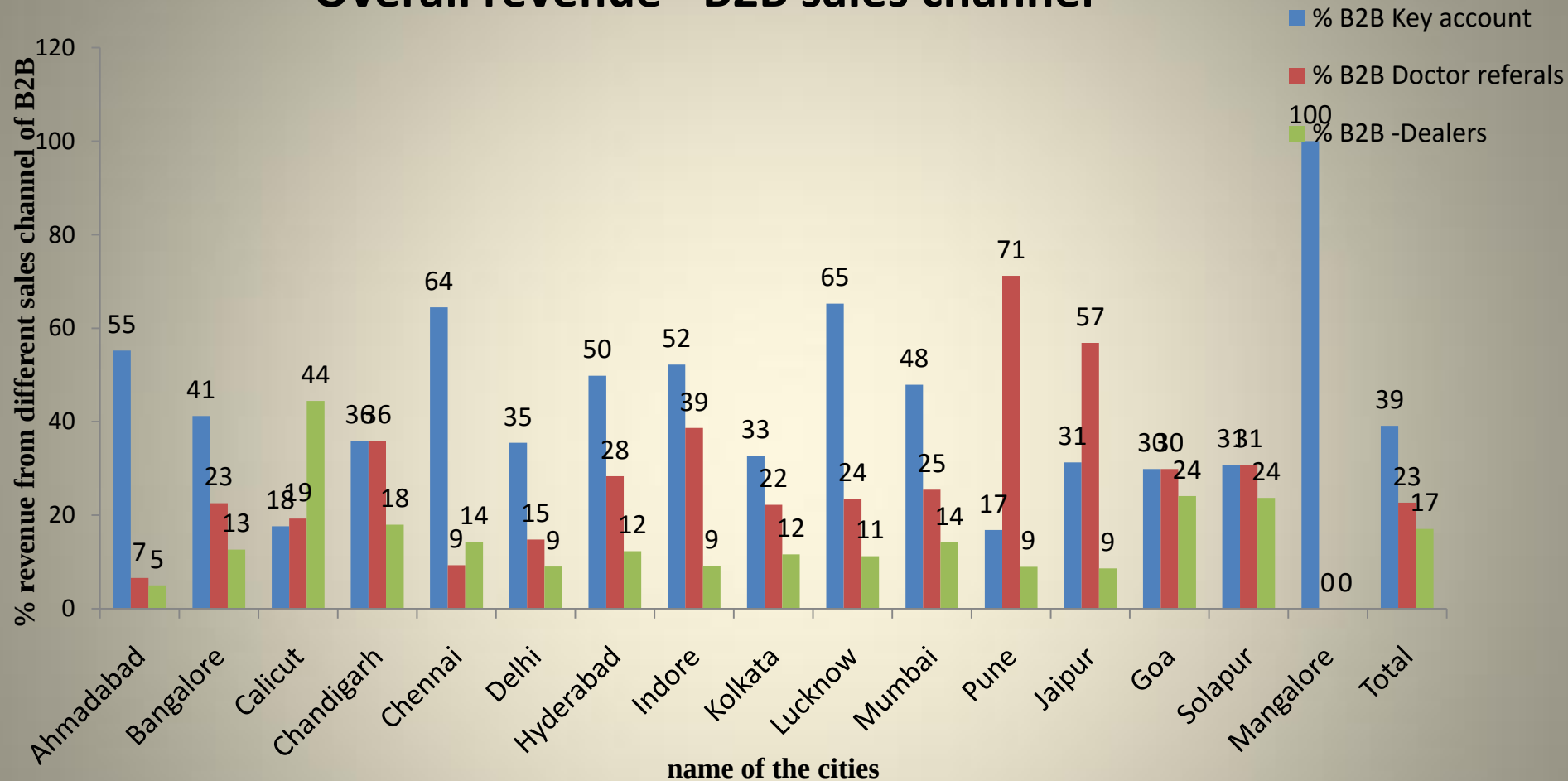
✓ Overall Rental revenue is much higher than sales revenue and in most of the cities also.

Overall revenue -Lead Source

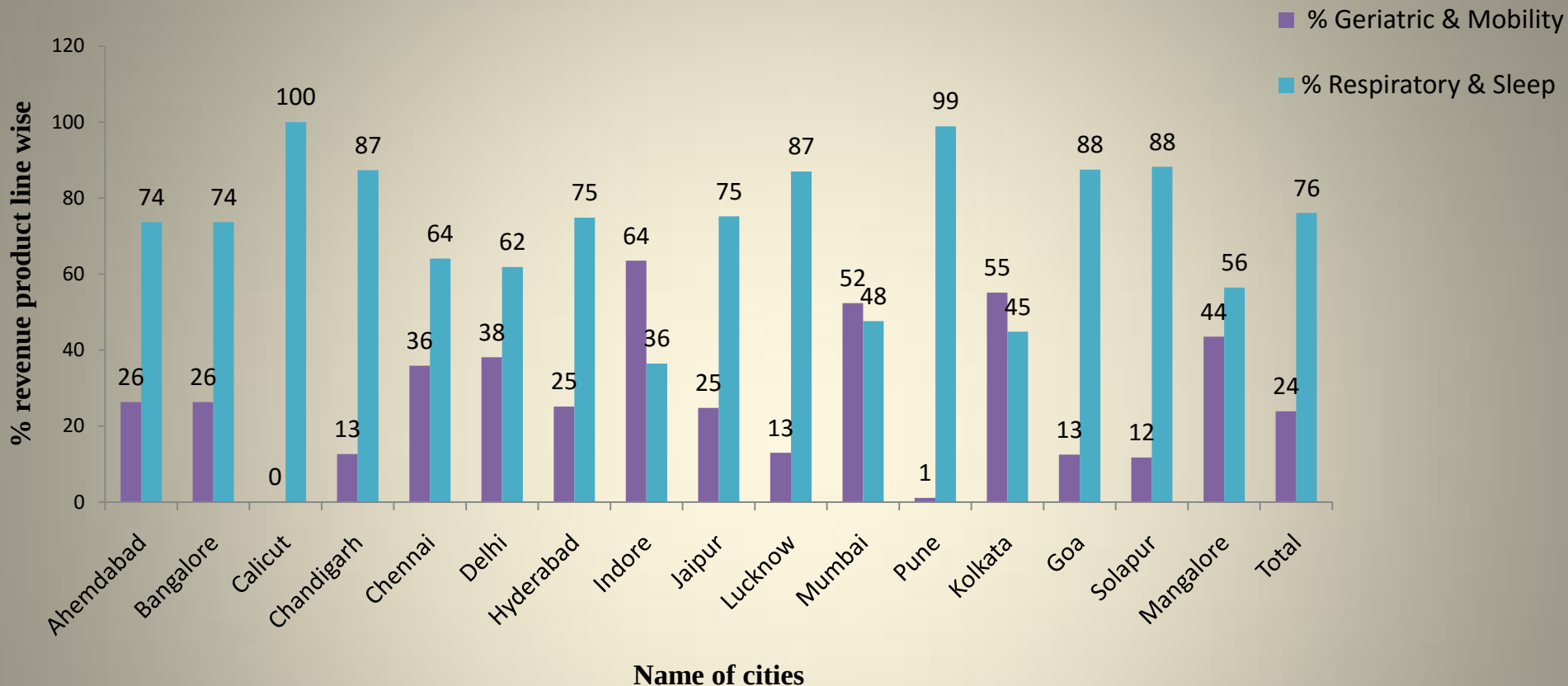


✓ In most of the cities B2B Revenue is much higher than B2C revenue.

Overall revenue - B2B sales channel



Overall revenue-Product line wise



✓ Revenue wise respiratory & Sleep product line is ahead in most of the cities.

- ***Compliance of internal tracking system :***

- ✓ Gap analysis of tracker city wise

City	Order Tracker Performance	Action required
Delhi	No entry from April 1	URGENTLY Need to fill up complete data of this month including carryover cases in Order tracker. <u>From May 1 on</u> daily basis.

- ✓ Quantitative approach :

City	Tabs	No of patient Tabs	No of coumns	Filled columns	Complete filling of data	Average	Regularity	ndex	Weightage	Total score
Hyderabad	Customer Basic Information	77	8	616	461	74.8	daily	66.8	100	83
	Sales Information		9	693	635	91.6				
	Equipment Information		9	693	634	91.5				
	Rental/Sales Delivery Process		14	1078	732	67.9				
	Equipment Return & Refund Process		9	693	58	8.4				

- **Conclusion :**

- ✓ Incomplete coverage from existing tracker.
- ✓ Tracking of leads & Orders on daily basis.
- ✓ Revenue- Sources/Channels/Product line.
- ✓ Streamlining and Implementation of Process flows at Pan India level.
- ✓ Accountability check of Ops team Pan India level.
- ✓ Easy to track High and low performing cities in terms of performance and revenue.

- **Limitations :**

- ✓ Execution of new tracking system at all India level
- ✓ Data compliance and validation at pan India level
- ✓ Dependency of Ops team for complete information

THANK YOU