

Title

Analysis of Lead Management and CRM Efficiency in the Obstetrics and Gynaecology Department at Sarvodaya Hospitals, Greater Noida

Introduction

In the modern healthcare landscape, efficient communication between patients and hospitals plays a critical role in patient satisfaction and clinical outcomes. Healthcare institutions are increasingly adopting technological solutions such as Customer Relationship Management (CRM) systems to manage patient inquiries, track follow-ups, and convert leads into admissions. CRM in hospitals functions as both an operational and strategic tool, supporting departments in delivering timely, patient-centred services while also helping management teams track performance and streamline resources. This is particularly important in high-volume departments such as Obstetrics and Gynaecology (O&G), where delays in response can result in missed opportunities or critical health consequences.

Sarvodaya Hospitals in Greater Noida is a private healthcare institution that uses CRM software to manage patient interactions. The Obstetrics and Gynaecology department, being one of the busiest units, generates a high number of inquiries related to pregnancy consultations, fertility treatments, delivery packages, and gynaecological surgeries. With this high volume comes the need for efficient CRM utilization. Delays in follow-up, missing documentation, or inconsistent lead classification can compromise patient experience and affect departmental productivity.

This study aims to analyse CRM performance in the O&G department at Sarvodaya Hospitals through a review of digital lead records. The study assesses how leads are classified, how quickly follow-ups are conducted, and how well communication is documented. The outcome of the study is expected to highlight operational gaps and suggest actionable improvements.

2. Review of Literature

Studies have found that CRM systems improve hospital performance by enabling structured communication with patients. Sharma (2022) concluded that hospitals using CRM platforms saw a 25% increase in admission rates over 12 months due to better lead management. Dixit et al. (2021) emphasized that structured follow-up protocols and comprehensive documentation were crucial to improving patient trust and conversion.

Globally, healthcare CRM systems are integrated with Electronic Health Records (EHR), allowing hospitals to create a seamless patient journey from inquiry to post-discharge follow-up. However, in India, CRM usage remains inconsistent, and many hospitals face challenges in ensuring timely follow-ups and maintaining complete data. As per Rajan et al. (2021), 30% of CRM entries in a sample of Indian hospitals had incomplete follow-up documentation, which led to suboptimal performance.

Existing research largely focuses on perceived benefits of CRM and lacks empirical analysis of backend CRM data. This study adds to the literature by analysing real-time CRM logs to assess documentation behaviour, turnaround time, and follow-up outcomes.

3. Theoretical and Conceptual Framework

This study is based on the Service Operations Theory and the CRM Value Chain Model. According to Service Operations Theory, the quality-of-service delivery is determined by responsiveness, reliability, and process efficiency. CRM systems are designed to enhance these service dimensions by providing a structured workflow and traceable communication records.

The CRM Value Chain Model focuses on the flow of lead data and its impact on strategic and operational decisions. The model in this study assumes that accurate lead entry, timely follow-up, and meaningful documentation are key drivers of conversion. Any lapse in this chain causes breakdowns in service delivery and management decision-making.

These models interact to influence the central outcome of **lead conversion**.

4. Research Gap

While CRM adoption is growing in Indian hospitals, department-specific usage and documentation behaviour have not been deeply studied. Most literature focuses on survey-based perceptions or case studies. There is a lack of research that uses CRM backend data to analyse TAT, note consistency, and conversion patterns.

This study fills the gap by:

Using actual CRM records from a tertiary hospital.

Analysing lead statuses, time lag, and note content.

Identifying system-level and behavioural inefficiencies.

5. Research Questions

1. What is the distribution of lead sources and final dispositions in the 178-lead CRM dataset?
2. How does first-call timeliness (≤ 48 hours vs. > 48 hours) affect conversion rates?
3. What themes are common in follow-up notes?
4. How consistent is the documentation across leads?
5. What recommendations can improve CRM operations?

6. Research Objectives

- To analyse lead status distribution and identify trends.
- To calculate follow-up lag and assess performance.
- To evaluate the content of follow-up notes.
- To identify CRM utilization gaps in the O&G department.

- To suggest operational improvements and best practices.

7. Methodology

The study uses a descriptive-analytical approach, drawing data from the CRM system of Sarvodaya Hospitals. Quantitative analysis was performed to calculate follow-up delays and status distribution. Qualitative analysis was used to assess the content of CRM notes. Excel was used to extract, clean, and analyse the data.

Sample: 179 unique leads

Time period: March–May 2025

Tools: CRM software, Excel.

8. Plan of Analysis

- Data cleaning and removal of duplicates
- Status-wise distribution table
- Follow-up lag computation
- Keyword frequency analysis for notes
- Visualization (pie chart, histogram)
- Gap identification and strategic recommendations

9. Ethical Considerations

- All identifiable patient data was excluded.
- Institutional approval was obtained.
- Data was anonymized and only operational fields were analysed.
- The research complies with IIHMR and hospital data ethics policies.

10. Implications of the Study

- **Practice:** Establishing a 48-hour follow-up policy, mandatory note templates, and real-time dashboards can boost conversion by an estimated 2.7× for timely leads.
- **Policy:** Hospital leadership should integrate CRM KPIs into performance evaluations and resource planning.
- **Theory:** Validates a CRM Effectiveness Framework in a non-Western, multi-specialty hospital context, demonstrating the value of mixed-methods integration.

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