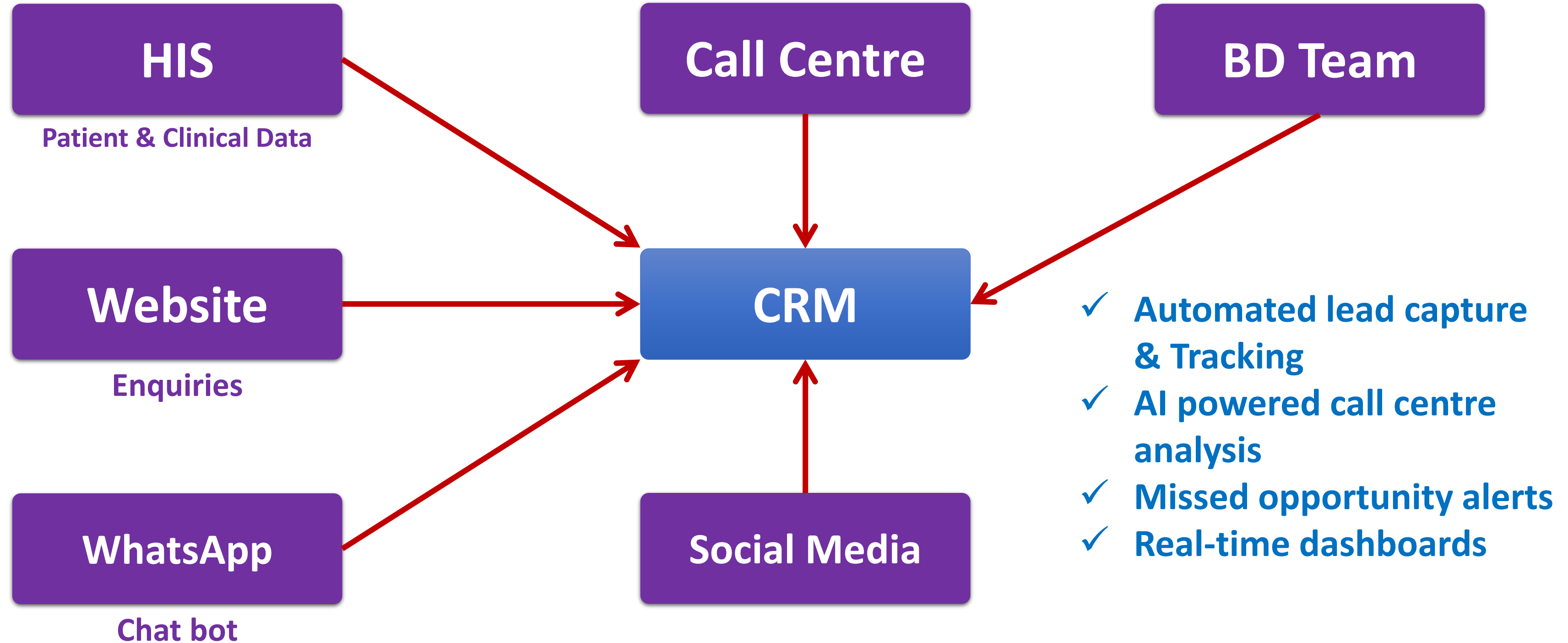


# From Inquiry to Care: AI-Powered CRM Transformation at BMH Group

# System Architecture



# Dynamic Form Builder for Lead Capture Forms

Details:

Version \*

1

Provide a unique version number for this form.

Form Fields:

+ Add Form Field

Submit

Select Field Type

Please select the type of field you want to add:

A Text Input

↑ Numeric Input

≡ Textarea

▼ Dropdown

👤 Doctor List

Details:

Version \*

1

Provide a unique version number for this form.

Form Fields:

Field Title:

Procedure

Field Placeholder / Help Text:

Procedure for which the patient has enquired

Text Input:

User will enter text here

Remove Field

Field Title:

# Lead Funnel Builder

## Funnel Stages

+ Add Stage

Search:

| Stage Order | Name                     | Description                                                    | Department                          | Linked Disposition(s) | Linked Priority | Initial? | Final? | Success? | Failure? | Escalation? | Auto Closure? | Active? | Actions |
|-------------|--------------------------|----------------------------------------------------------------|-------------------------------------|-----------------------|-----------------|----------|--------|----------|----------|-------------|---------------|---------|---------|
| + 1         | LEAD FOR FIRST FOLLOW UP | FIRST FOLLOW UP BY BUSINESS TEAM                               | CALL CENTER CALICUT                 | -                     | -               | Yes      | No     | No       | No       | No          | No            | Yes     | Edit    |
| + 1         | CASH-ESTIMATED COST      | FINANCIAL COUNSELLING DEPT HAS TO ENTER ESTIMATED COST         | ADMISSION/ COUNSELLING DESK CALICUT | -                     | -               | No       | No     | No       | No       | No          | No            | Yes     | Edit    |
| + 1         | CHECK ADMISSION STATUS   | CHECK ADMISSION STATUS BY BUSINESS OFFICE                      | BUSINESS OFFICE CALICUT             | -                     | -               | No       | No     | No       | No       | No          | No            | Yes     | Edit    |
| + 1         | INSURANCE COUNSELING     | INSURANCE COUNSELING                                           | INSURANCE CALICUT                   | -                     | -               | No       | No     | No       | No       | No          | No            | Yes     | Edit    |
| + 1         | INSURANCE-ESTIMATED COST | INSURANCE DEPT HAS TO ENTER ESTIMATED COST GIVEN FOR TREATMENT | INSURANCE CALICUT                   | -                     | -               | No       | No     | No       | No       | No          | No            | Yes     | Edit    |

# Intelligent Lead Follow-up Prioritization

 BIA ×

 I'm BIA, **BMH Intelligent Assistant**. I can review your department's lead pipeline to help you prioritize your work.

**Suggested Tasks:** 4341

Which of the following would you like to focus on now?

 **Today's Reminders (136)** You've got **136** follow-ups waiting for you today. Together, they already represent about **₹1,09,77,382** in opportunities.

 **Overdue Reminders (420)** You've got **420** overdue follow-ups that slipped through earlier. They're currently worth about **₹4,26,16,223**.

 **Overdue Yesterday (1)** Of your overdue reminders, **1** were due yesterday (these are not counted separately in the task total).

 **Missing Reminder Dates (1)** **1** leads don't have a follow-up date set. Adding reminders will make sure none of them quietly slip away.

 **Missing Est. Amounts (0)** **0** leads don't have an estimated value recorded yet. Based on similar leads, these could add value of around **₹0** to **₹0** to the potential pipeline.

 Click on any of the options above to proceed.

× Close

# Privilege Card Generator

Edit Card Type Layout (Front)  
CRM - Privilege Cards - Edit Layout (Front)



MEITRA  
HOSPITAL



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ACCESS +

Bijoy Johnson

VALID THRU 12/26

Font Size:  Font Color:  Font Family:

Save Layout

# Analytics Hub

## Hospital Analytics Hub

Navigate all CRM dashboards and reports for your hospital in one place. Pin your most-used reports for quick access.

★ Favourites

Agents

**Agent Performance Matrix**

Compare productivity across enquiries, leads, and activity.

Enquiries

**Enquiry Report**

All enquiries with filters by service, type, and purpose.

Enquiries

**Doctor Consultations**

Consultation list for tracking CRM compliance.

Leads

**Lead Report**

Filterable list of all captured leads.

You can pin more reports below — or unpin existing ones anytime using the ★ icon.

📌 Lead Overview & Funnels

Detailed reporting insights and analysis.

📊 Hospital Lead Dashboard

Overall lead funnel, performance, and trends.

📋 Lead Report

Filterable list of all captured leads.

📄 Lead Detailed Report

Deep-dive view of all leads.

📈 Lead Conversion Matrix

Conversion performance across stages and departments.

👥 Lead Status Matrix

Snapshot of leads across departments and funnel stages.

✖ Lead Failure Matrix

Analysis of reasons for lost / failed leads.

👥 Agent Performance & Activity

Detailed reporting insights and analysis.

👥 Agent Performance Matrix

Compare productivity across enquiries, leads, and activity.

📋 Lead Task Dashboard

Track pending follow-up tasks.

📄 Lead Task History Report

Timeline of stage movements done by each user.

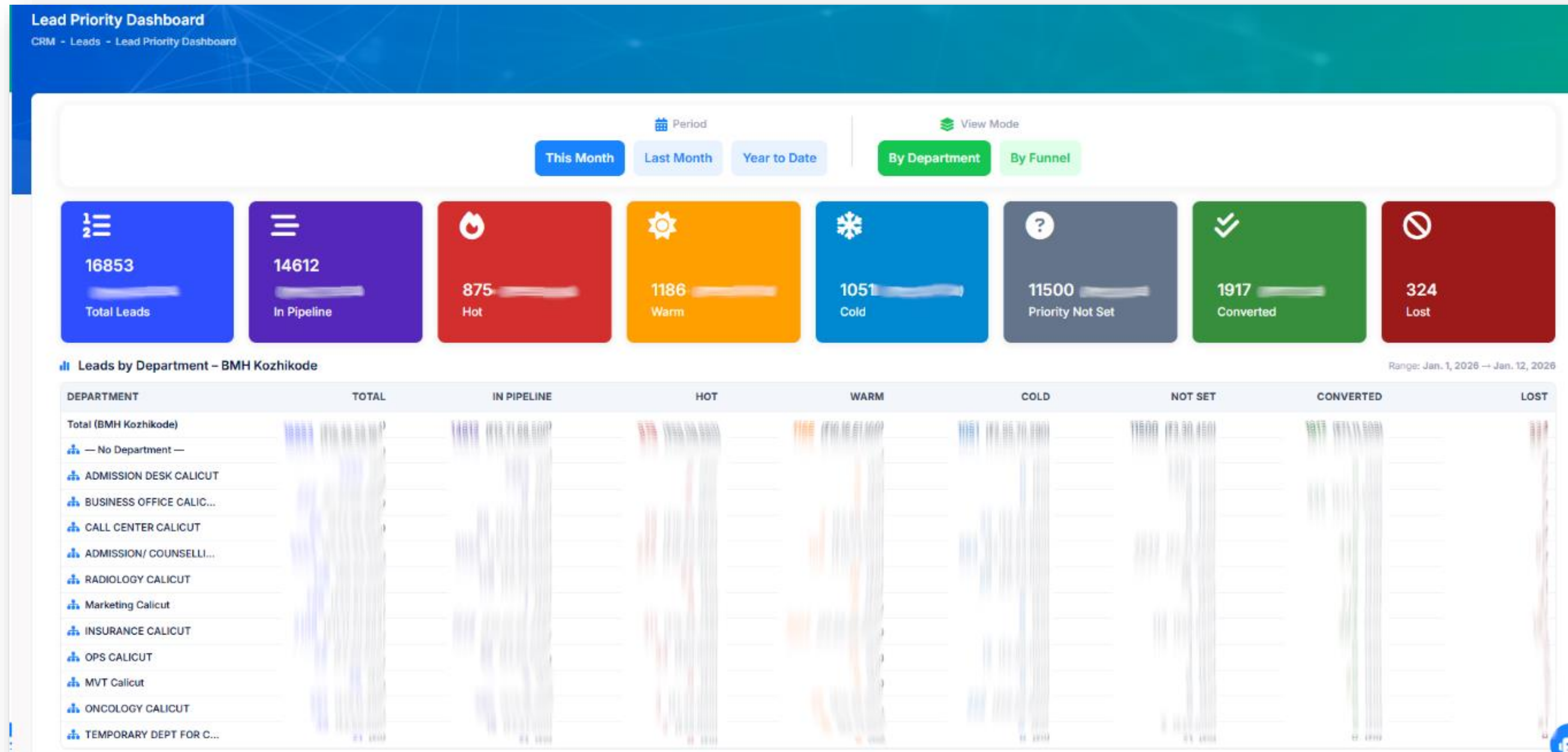
💬 Lead Interaction Report

Report of interactions recorded by each user.

Wide range of Reports and Dashboards

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# Lead Priority Dashboard



Track status of leads across various priority levels across assigned departments

# Lead Status Analytics

Lead Status Matrix

Funnel

IP CALICUT

View Mode

Department

Doctor

☐ Hide empty rows

Export to Excel

Search:

| CLINICAL DEPARTMENT              | CASH-ESTIMATED COST | MARK AS DUPLICATE | LEAD FOR FIRST FOLLOW UP | CHECK ADMISSION STATUS | INSURANCE COUNSELING | INSURANCE-ESTIMATED COST | ESTIMATE TO BE GIVEN | SECOND FOLLOW UP TO BE DONE | THIRD FOLLOW UP TO BE DONE | ADMITTED | LOST LEAD | CONVERTED | CONV % | LOST | LOST % | OPEN |
|----------------------------------|---------------------|-------------------|--------------------------|------------------------|----------------------|--------------------------|----------------------|-----------------------------|----------------------------|----------|-----------|-----------|--------|------|--------|------|
| MEDICAL GASTROENTEROLOGY         | 14                  | 13                | 30                       | 9                      | 5                    | 0                        | 0                    | 12                          | 7                          | 70       | 0         | 70        | 44%    | 0    | 0%     | 90   |
| OBSTETRICS & GYNAECOLOGY         | 8                   | 3                 | 16                       | 1                      | 6                    | 0                        | 0                    | 22                          | 12                         | 50       | 0         | 50        | 42%    | 0    | 0%     | 68   |
| MEDICAL ONCOLOGY                 | 3                   | 4                 | 16                       | 0                      | 1                    | 0                        | 0                    | 6                           | 0                          | 44       | 0         | 44        | 59%    | 0    | 0%     | 30   |
| PAEDIATRICS                      | 2                   | 2                 | 5                        | 0                      | 2                    | 0                        | 0                    | 13                          | 0                          | 18       | 2         | 18        | 41%    | 2    | 5%     | 24   |
| PULMONOLOGY                      | 0                   | 1                 | 2                        | 0                      | 0                    | 0                        | 0                    | 2                           | 3                          | 15       | 0         | 15        | 65%    | 0    | 0%     | 8    |
| ORTHOPAEDICS                     | 12                  | 3                 | 9                        | 1                      | 3                    | 0                        | 4                    | 33                          | 6                          | 14       | 0         | 14        | 16%    | 0    | 0%     | 71   |
| GENERAL MEDICINE                 | 5                   | 1                 | 8                        | 0                      | 4                    | 0                        | 0                    | 7                           | 1                          | 14       | 0         | 14        | 35%    | 0    | 0%     | 26   |
| UROLOGY                          | 15                  | 3                 | 9                        | 0                      | 8                    | 0                        | 2                    | 9                           | 2                          | 11       | 0         | 11        | 19%    | 0    | 0%     | 48   |
| SURGICAL GASTROENTEROLOGY        | 7                   | 2                 | 9                        | 0                      | 2                    | 0                        | 1                    | 8                           | 2                          | 10       | 0         | 10        | 24%    | 0    | 0%     | 31   |
| PLASTIC & RECONSTRUCTIVE SURGERY | 17                  | 6                 | 4                        | 2                      | 0                    | 0                        | 0                    | 11                          | 3                          | 10       | 0         | 10        | 19%    | 0    | 0%     | 43   |
| Total                            | 137                 | 47                | 204                      | 18                     | 58                   | 0                        | 21                   | 232                         | 70                         | 332      | 2         | 332       | —      | 2    | —      | 787  |

<<

<

1

2

3

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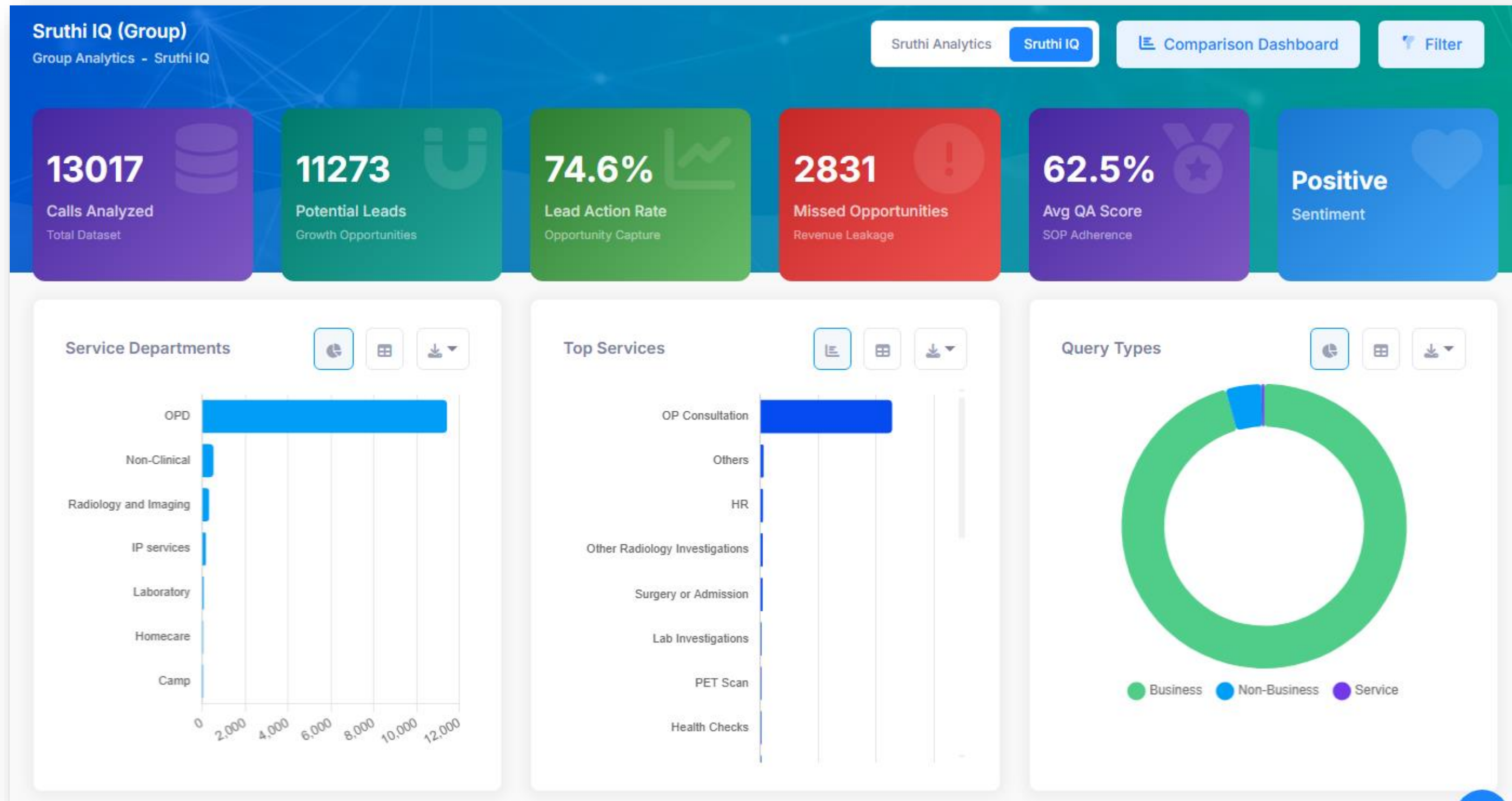
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6

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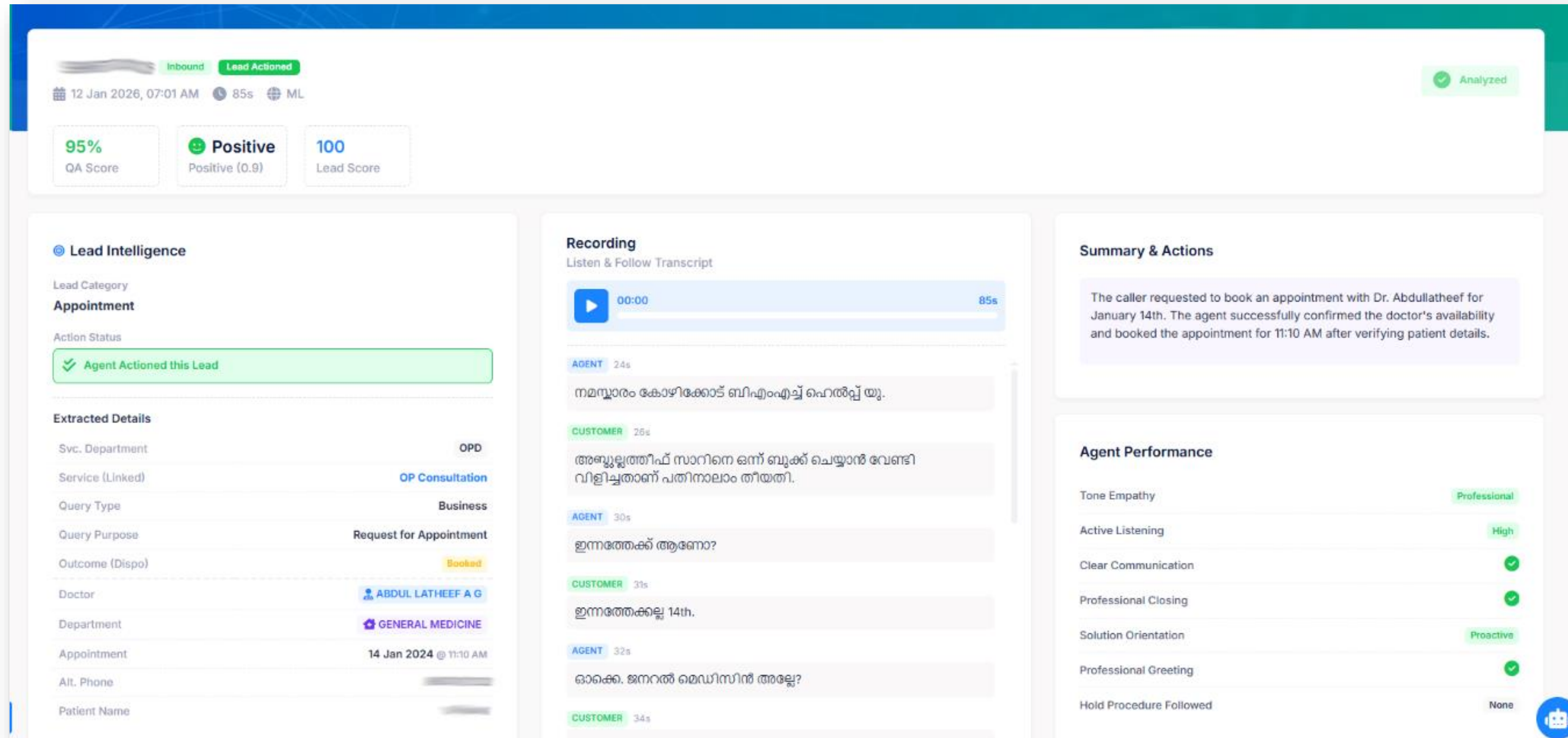
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# AI Call Intelligence



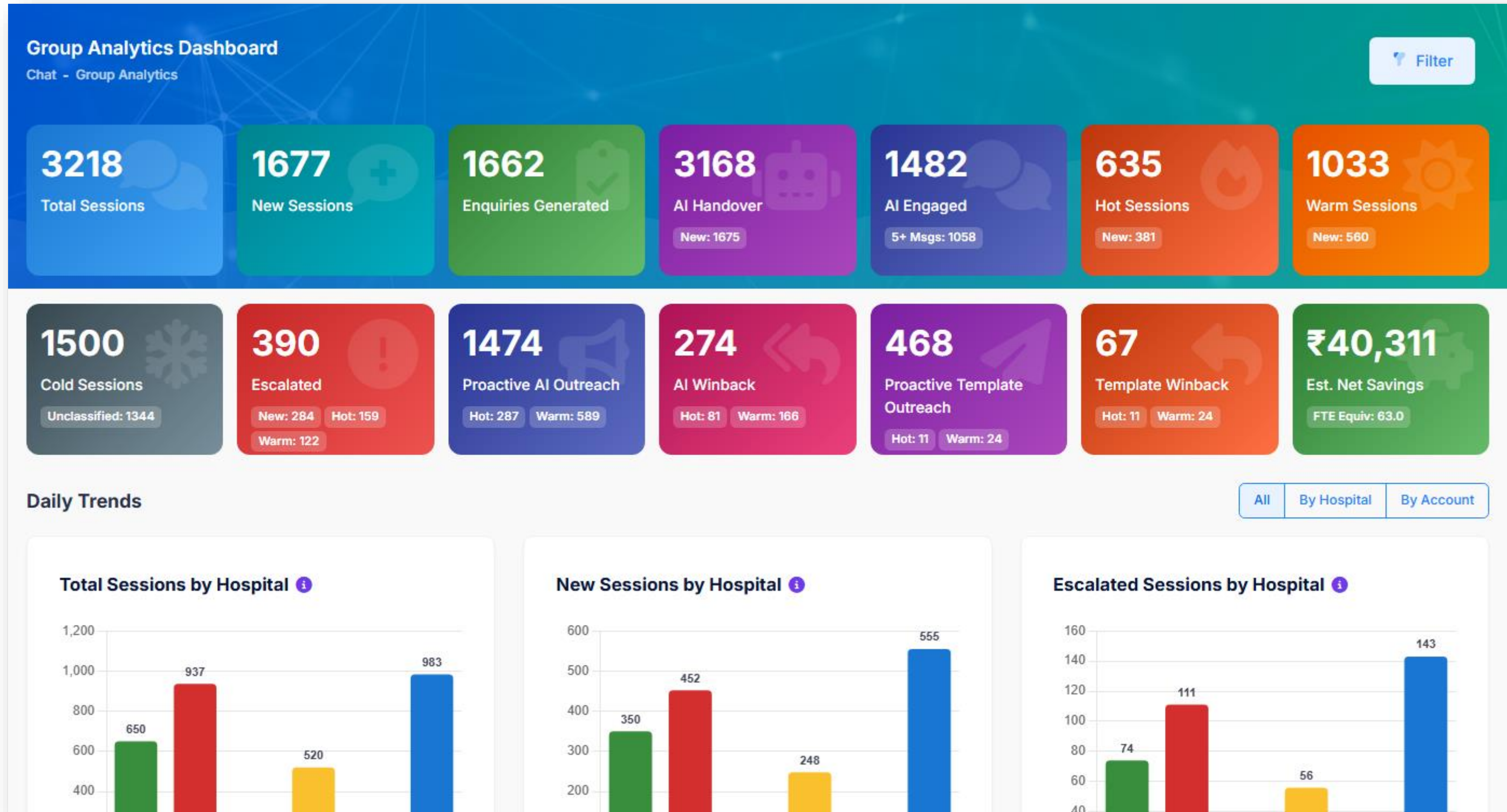
AI Analytics for Call Centre

# Call Quality Analytics



Gain deep insights into call quality for assessment and training of call centre executives

# WhatsApp Chat Analytics



# Landing Page Builder



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|-------------------------------|----------------------------------|----------------------------------|------------------------------------|

No-code Landing Page Builder