

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

Category: Digital Excellence

Focus Area: Innovative trends and strategies

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Problem Statement / Digital Challenge

Baby Memorial Hospital Group operates 9 hospitals across 3 states in South India, with multiple hospital brands and units managed within a shared healthcare ecosystem. Patient acquisition, engagement, and follow-up were previously handled through fragmented channels, including phone calls, WhatsApp and web pages. This created gaps in visibility across the patient journey, delayed response to high-intent enquiries, inconsistent follow-up ownership, and limited leadership oversight on conversion failures or missed opportunities.

As digital touchpoints increased across hospitals, manual processes became inadequate for managing enquiry volumes, patient conversations, campaign responses, call intelligence, and service-level accountability. The absence of a unified CRM also made it difficult to scientifically track leads from enquiry to appointment, measure marketing effectiveness, identify drop-offs, and ensure timely action by responsible teams.

The digital challenge was to build an integrated, AI-enabled, multi-tenant CRM ecosystem that could act as a single source of truth across the Baby Memorial Hospital Group. The required solution had to combine lead follow-up workflows, WhatsApp chatbot, voice bot/call intelligence, campaign tracking, and HIS integration into one secure platform.

The initiative supports NABH quality priorities related to continuity of care, documentation, data-driven quality improvement, patient experience, governance, and measurable operational accountability.

Digital Tool / Solution Implemented

The initiative introduced an in-house, AI-enabled, multi-tenant CRM platform as a unified digital operating layer for patient engagement, marketing operations, follow-up management, and conversion tracking across the entire group. The platform integrates with HIS systems through secure APIs and captures enquiries from calls, WhatsApp, web forms, campaign landing pages, and other digital touchpoints.

Core modules include smart lead management, automated follow-up workflows, no-code landing page builder, digital campaign tracking, WhatsApp chatbot, voice bot, AI call intelligence, and operational dashboards. Separate engagement workflows manage privilege cards, coupon generation, approvals, and utilization tracking.

The AI chatbot supports the enquiry-to-conversion workflow and escalates to human agents when required. The analytics layer provides dashboards for lead funnels, enquiry-to-lead conversion, pipeline health, agent productivity, follow-up tasks, campaign performance, WhatsApp engagement, voice bot campaigns, call quality, sentiment, and AI-identified missed opportunities across units.

Digital Implementation Highlight

The initiative was implemented by the in-house IT team in close partnership with marketing, and operations teams. Requirements from all participating units were actively collected, reviewed, and prioritized so that local operational needs could be implemented in a way that benefited the entire Baby Memorial Hospital Group. Strong support from top management enabled faster decision-making, cross-functional coordination, and adoption across hospitals.

Implementation began with core CRM workflows for enquiry capture, lead creation, assignment, follow-up, and task tracking. This was followed by HIS integration, digital campaign and landing-page modules, WhatsApp chatbot workflows, voice bot engagement, privilege card management, coupon approval flows, and AI-enabled intelligence features.

AI was embedded across multiple layers, including WhatsApp chatbot conversations, call transcription, call quality analysis, sentiment analysis, missed-opportunity identification, lead failure reason analysis, and generative BI for creating graphs, summaries, and actionable insights from CRM data.

Staff adoption was supported through practical, task-oriented workflows, unit-level dashboards, user feedback loops, and continuous refinement. Internal champions from marketing, operations, and hospital administration helped validate workflows

and drive usage. The platform evolved through daily and weekly feature releases, enabling low-cost incremental innovation while maintaining reliable performance.

Digital Impact

The platform has significantly improved visibility, efficiency, and accountability across Baby Memorial Hospital Group's patient engagement ecosystem. It has tracked over 4.3 lakh patient leads across diverse lead types, ranging from OP consultations and diagnostic enquiries to health packages, admissions, procedures, and surgical cases. More than 1.7 lakh WhatsApp chat sessions have been processed, enabling automated enquiry handling, lead creation, initial screening, and conversion support.

The AI chatbot now manages a major part of the initial patient engagement workflow, performing work equivalent to approximately 55 FTEs and generating an estimated annual productivity value of around ₹1.3 Crores. This productivity gain reflects manpower effort saved through automation, allowing agents to focus on final follow-up, patient coordination, appointment conversion, and exception handling.

The in-house build has delivered an estimated annual saving of ₹1.6 Crores compared with commercial enterprise CRM alternatives, while also avoiding high costs involved in product customization and change requests. AI-enabled call intelligence and missed-opportunity detection help identify high-intent enquiries that may otherwise be lost.

The platform supports NABH digital health accreditation and certification readiness

by strengthening traceability, documentation, access controls, dashboard-based monitoring, governance, and continuous quality improvement across units.

Key Enablers / Innovations

Critical enablers included strong top-management support, in-house technical capability, continuous stakeholder engagement, and the ability to align diverse unit-level practices into a common group-wide operating model. Different hospitals had different workflows for enquiry capture, lead assignment, follow-up, campaign response, call-centre handling, privilege cards, coupons, and reporting; these had to be unified without affecting day-to-day operations.

The in-house approach allowed these requirements to be quickly understood, configured, tested, and refined with end users. AI was used across the platform as an intelligence layer for chatbot-led enquiry handling, voice bot engagement, call review, sentiment assessment, missed-opportunity detection, lead failure analysis, and generative BI for dashboards, graphs, and management insights.

Key challenges included integrating with multiple HIS systems, ensuring data quality, standardizing workflows, and driving adoption among users accustomed to manual processes. These were addressed through secure API integration, configurable workflows, role-based controls, phased releases, internal champions, practical training, dashboards, and continuous feedback-led improvements.

Key Learnings & Sustainability

The most important learning is that healthcare digital transformation succeeds when it is co-created with end users and directly solves operational pain points faced by frontline teams. Continuous user involvement helped ensure that workflows were practical, relevant, and adopted in daily operations.

A second learning is that group-wide transformation should balance standardization with local flexibility. Requirements from individual units were captured, refined, and converted into scalable workflows that benefited the entire Baby Memorial Hospital Group rather than remaining isolated unit-level solutions.

Compared with external vendor-led implementations, the in-house agile methodology enabled faster prioritization, rapid rollout of daily and weekly feature enhancements, lower cost, and quicker resolution of user pain points. This improved adoption and ensured the platform evolved with real operational needs.

Other hospitals should define enquiry-to-conversion workflows clearly, integrate early with HIS systems, build decision-oriented dashboards, and use AI to improve prioritization, insight generation, and follow-up quality.

Reference Sources (If Applicable)

Not Applicable

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