



# Physician Relationship Management

## For Microsoft Dynamics CRM 2011

### MANAGE CONTACTS

Keep track of all departments and practices, their key contacts, emails, telephone calls, visits, notes & comments, upcoming appointments & reminders

### TRACK ISSUES & REQUESTS

Leverage Dynamics CRM powerful workflow capabilities to capture requests & complaints, route them to the appropriate person for follow-up, track their status.

### PHYSICIAN RECRUITING

Track hiring opportunities, candidates, attach cv's, coordinate candidate visits, capture interviewer comments, record opportunity and candidate expenses and generate reports.

### OCCUPATIONAL HEALTH

Track organizations, contacts, events and attendees. Gather feedback and use our marketing campaign feature to notify attendees of upcoming events of interest

### TRACK REFERRALS

View the latest referral information by physician and payer mix.

### FREEDOM OF CHOICE

Choose how you use it (MS Outlook, Browser or Mobile); how you get it (On Premise or Hosted); how you buy it (Own or Rent) and Change your mind at any time!

Finally there is a Physician Relationship Management Solution that has been designed by Physician Liaisons, is built upon the standards that your IT department supports and uses the tools that you are already familiar namely Microsoft Outlook and Microsoft Office.

PRM for Microsoft Dynamics CRM 2011 gives you a central place to gather information about departments, practices, and contacts throughout your health system; organize marketing lists to simplify targeted communications; send emails and make office visits and have them tracked in PRM. Activity reports are available at any time and provide a 360° view of all interactions with a department, practice or physician.

- Manage your department and practice contacts and activities
- Use workflow rules to track complaints and follow-up on contact requests. Use reports to identify and target areas of improvement.
- Track recruiting opportunities, candidates, activities, and expenses; manage candidate visits and new hire processing and report on opportunities by status, department, and specialty
- View referral information by physician, payer mix, service line etc.
- Organize Community Outreach programs, speakers, events and attendees. Gather feedback and notify attendees of upcoming events.
- Access & update your CRM information when you leave the office from your Blackberry, I Phone, I Pad or other mobile device



# Service Features and Benefits

Manage e-mails, office visits, tasks, and contacts from a single business application. Create a centralized, customizable view of your Physician preferences, relationships, and activity history to better understand and meet their needs. Establish consistent follow-up processes for physician complaints and automate activities with powerful system workflow. Use simple, wizard-driven features to log interactions, keep your contacts informed of upcoming events and new service offerings. Use dashboards and reports to measure business activity and performance, track candidates and recruiting success, and identify trends and problems. Manage and monitor all your interactions and synchronize your CRM email, appointments, tasks and contacts with your MS Outlook.

Use customizable templates to create and send letters or e-mail messages to targeted contacts. Quickly create and send communications using Microsoft Word Mail Merge. Automatically detect

and remove duplicate records to ensure the quality of your customer data. Access robust functionality from virtually any location using the Web client or a wide variety of PDA/SmartPhone devices.



## System Requirements

- **Client Requirements:** 2.0 GHZ Processor; 2-4 GB RAM; MS Office 2003 SP3 or higher, MS Windows XP Pro SP3 or higher, Internet Explorer 7 or higher.
- **Server Options:** CRM can be deployed in either an On Premise or cloud/hosted by Microsoft.
- **Data Migration Services:** SSG's staff can convert your current information from contact managers such as ACT, Goldmine or Outlook; databases such as MS Access or desktop applications such as MS Excel
- **Installation & Training:** Let our experienced team of implementation professionals assist you in every step of the implementation process from planning to installation; and from training to post implementation help desk support.

*"I have been very pleased with the functionality of the Microsoft Dynamics CRM product. Once we loaded our data and I began to pull reports I was amazed with the flexibility and ease to configure just what I need. This information will help me greatly in reviewing our progress with the Executive team. The support at Software Solutions Group is awesome!"*

Anita Laurence  
Physician Relations & Marketing Mgr.  
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**Visit us at [www.softsolgrp.com/PRM](http://www.softsolgrp.com/PRM) for information or to sign up for our free weekly web seminars.**

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