Futureforce Case Challenge Grand Finale

Team Prodwizz

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Executive Summary: Bridging the Post-Discharge Gap with Agentforce

Patients leave with complex instructions and no easy way to act; Dr. Astro turns discharge plans into simple daily actions.

Overall description of the US Healthcare Industry	$1.3B+ Medicare Revenue lost due to HRRP penalties	47% Find healthcare very confusing	3.6 mil Who struggle to secure transportation to in-person medical care	38% Expected CAGR for AI in healthcare industry	41% Attribute Unplanned Care to Poor Communicaions	50% Find regular care-plan reminders appealing

Primary Research

- **94%** Rely on manual means to track medicines
- **65%** Feel medicine stockout alerts are helpful
- **56%** Find difficulties in understanding prescriptions

Secondary Research

- **33%** Insufficient Post-Discharge Care
- **24%** Lack clear understanding of diagnosis
- **80%** Favour GenAI adoption in healthcare
- **17%** Unable to follow instructions
- **21%** Non-adherence re-admissions

Our Solution: Dr. Astro - your Post-Discharge Companion

An **intelligent, AI-powered agent** integrated within the **Salesforce ecosystem**, designed to provide seamless and personalized post-discharge care.

Dr. Astro
It acts as a **virtual health assistant**, empowering patients to confidently **manage their recovery intervening** at the most friction embedded part of the patient journey - **post discharge**.

App. Booker · Einstein AI · MuleSoft · Patient360 · Dr. Astro powered by Agentforce
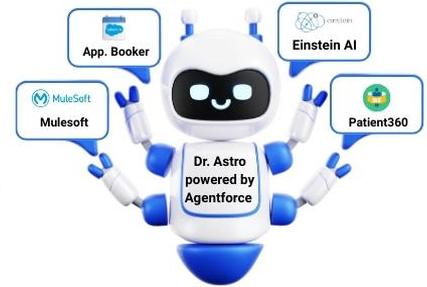
Challenges based on Primary and Secondary research

The post-discharge period is a critical and vulnerable phase in a patient's journey, often leading to confusion, non-adherence to care plans, and high rates of hospital readmission

Why for Patients

- A disconnected post-discharge experience erodes patient trust and loyalty
- Impersonal, generic care plans create confusion and anxiety for patients at home

Why for Hospitals

- High readmission rates trigger direct financial penalties by HRRP, reducing crucial Medicare reimbursements
- Poor post-discharge outcomes lead to significant revenue loss and forfeiture of performance-based bonuses

Boosting Patient Engagement with Dr. Astro

Personalized Guidance
EHR-driven care plans & plain-language instructions.

Easy Access
In-app support for questions & scheduling

Proactive Support
Automated reminders for meds & appointments.

Increased Digital Adoption
Expected rise in virtual care engagement.

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Summary › Personas › Journey & Pain points › Solutions › Feature Prioritisation & MMP › Demo implementation › Wireframes › Compliance › Roadmap

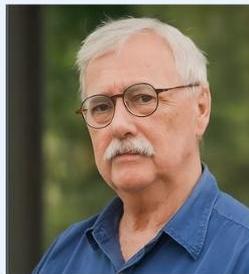# User Personas: Primary and Secondary Personas

Diving deeper into the lives of two different patients

Primary Persona

Andrew

- 68 years old - with a **heart stent post cardiac arrest**
- Lives with spouse
- Android phone - non-tech-savvy, avoids complex apps
- Mild hearing issue - prefers large text and audio

Phase: Discharge to Day 7

Current state
- ❌ Paper instructions are hard to follow
- ❌ Unsure about 6 medicines and their timings
- ❌ Faces heavy traffic on hospital call-line when calls for help

Interventions
- Plan in plain language
- Pill-count prompt
- Smart reschedule

Potential future state
- ✔ Completes daily micro check-ins for a week
- ✔ Reschedules or confirms first follow-up without calling
- ✔ Nurse calls pro-actively only if risk rises

Post-Discharge Confidence

When I am discharged from the hospital with complex instructions, **I want** simple, clear communication and medication reminders **So that I can** confidently follow my care plan without missing doses or appointments.

Secondary Persona

Emma

- 29, software consultant
- Lives with roommates
- iPhone - prefers SMS or App, English
- No comorbidity, has employer insurance

Phase: Clinic visit to Day 5

Current state
- ❌ Needs a plan that fits meetings
- ❌ Wants to know when it is safe to fly
- ❌ Requires fast reschedule if still unwell tomorrow

Interventions
- Travel safety guidance
- Smart reschedule
- Med Schedule

Potential future state
- ✔ "Today's 3 tasks" checklist with antiemetic timing
- ✔ Hydration goal with travel tips
- ✔ Auto reschedule to tele-visit and return-to-travel note
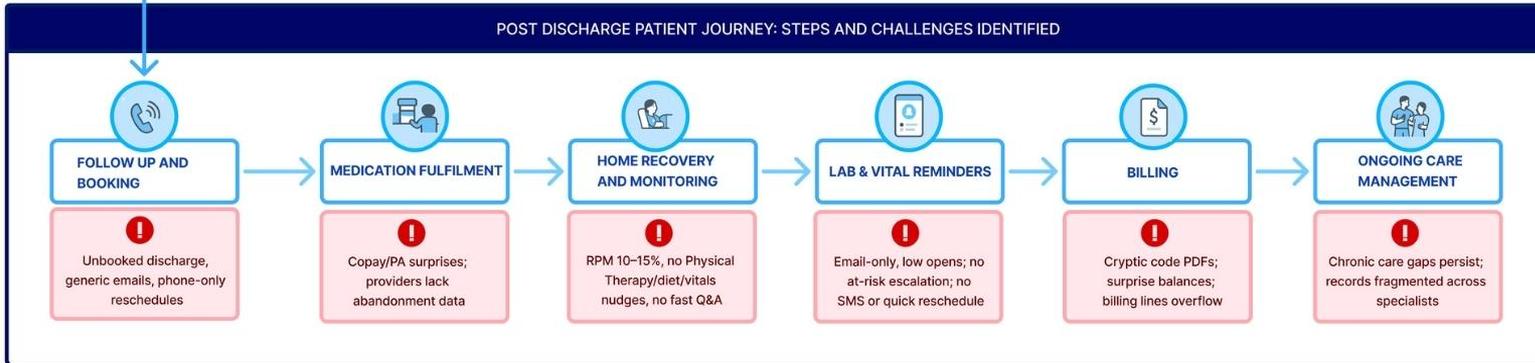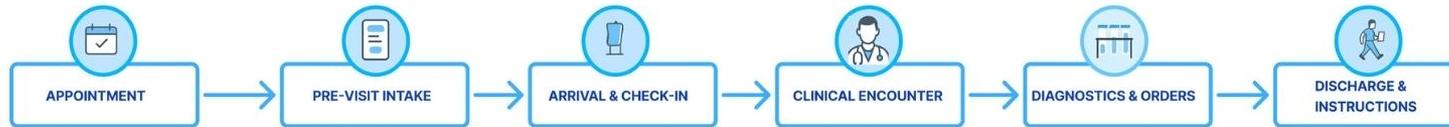
Ongoing-Health Support

When I am maintaining my ongoing health, **I want** continuous, data-driven insights and tailored recommendations **So that I can** prevent issues early and feel supported beyond doctor visits.

WHY WE CHOSE ANDREW: Patients like him need regular adherence to care-plans and have a higher susceptibility of readmission if not thorough with routine

Current Patient Journey and Pain Points

How fragmented systems today lead to poor outcomes, patient frustration, and higher costs.

APPOINTMENT → PRE-VISIT INTAKE → ARRIVAL & CHECK-IN → CLINICAL ENCOUNTER → DIAGNOSTICS & ORDERS → DISCHARGE & INSTRUCTIONS

POST DISCHARGE PATIENT JOURNEY: STEPS AND CHALLENGES IDENTIFIED

FOLLOW UP AND BOOKING
⚠ Unbooked discharge, generic emails, phone-only reschedules

MEDICATION FULFILMENT
⚠ Copay/PA surprises; providers lack abandonment data

HOME RECOVERY AND MONITORING
⚠ RPM 10–15%, no Physical Therapy/diet/vitals nudges, no fast Q&A

LAB & VITAL REMINDERS
⚠ Email-only, low opens; no at-risk escalation; no SMS or quick reschedule

BILLING
⚠ Cryptic code PDFs; surprise balances; billing lines overflow

ONGOING CARE MANAGEMENT
⚠ Chronic care gaps persist; records fragmented across specialists

IMPACT

- Increased Readmissions
- Increased Burden on Staff
- Patient Isolation
- Worsening Chronic Disease
- High no-shows
- Poor Adherence
- Patient Dissatisfaction

Summary | Personas | Journey & Pain points | Solutions | Feature Prioritisation & MMP | Demo implementation | Wireframes | Compliance | Roadmap

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Introducing Dr. Astro: Closing the Post-Discharge Gap

Identifying features to solve pain points along with the benefits to different stakeholders

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Journey Step	Mapped Pain Point	Consequence if Unsolved	Benefit to Patient/User	Benefit to Hospital/Clinic
Feature 1: Appointment Booking & Reminder Engine				
Leveraging the Appointment Booker for easy booking of appointments and a new scheduler engine which triggers care-plan linked reminders via running a regular job on Patient 360 to search for upcoming events				
Follow-Up & Booking	Unbooked discharge and phone-only reschedules	High no-shows and call volume	Confirm in minutes and 1-tap reschedule with calendar sync	No-shows down and staff time saved
Lab & Vital Reminders	Email-only reminders and no quick reschedule	Missed labs and delays	SMS or WhatsApp nudges and 1-tap reschedule	Higher lab completion and smoother capacity
Feature 2: Core Agent Platform (UI & EMR)				
An interface where patients interact with the agent to access EMR-linked insights, receive instant clarifications to care related questions through natural language based prompts.				
Follow-Up & Booking	No fast Q&A on prep or policy	Cancellations and mis-prepped visits	Instant answers and prep clarity	Fewer avoidable calls and better prepared visits
Medication Fulfilment	No fast med questions answered	Nurse line overflow and delays	Quick med answers any time	Lower call volume and faster resolution
Recovery & Monitoring	No fast Q&A during recovery	Repeat calls and anxiety	Instant answers and reassurance	Nurse calls avoided
Lab & Vital Reminders	Questions block completion	Pushouts and rework	Know what to do now and where to go	Missed appointments down
Feature 3: GenAI Care Plan Guidance				
Breaks down complex medical instructions into small, daily actionable steps, leveraging Einstein AI's capabilities of identifying conversational intents and providing accurate EHR-linked summaries				
Medication Fulfilment	Cryptic dosing and instructions	Non-adherence and adverse events	Plain-language steps with "why it matters"	Readmission risk reduced
Recovery & Monitoring	No day-by-day plan or context	Drop-off in adherence	Small daily tasks that fit routine	Better outcomes and fewer escalations

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Summary Personas Journey & Pain points Solutions Feature Prioritisation & MMP Demo implementation Wireframes Compliance Roadmap

Feature Prioritisation and MMP

Prioritising each feature using RICE framework

Feature	Reach (0-10)	Impact (0-10)	Confidence (%)	Effort (1-10)	RICE Score
Appointment Booking & Reminder Engine	10	10	90%	4	22.5
GenAI Care Plan Guidance	10	9	70%	5	12.6
Core Agent Platform (UI & EMR)	10	8	90%	7	10.3
Conversation Router to Doctors	8	9	90%	5	12.9
CS Feedback & Second Order Fixes	10	6	100%	5	12
Caregiver Access Portal	6	10	75%	7	6.42
Speciality Medication Management	8	9	80%	8	7.2
Vital Health Tracker (Wearables)	7	9	100%	9	7
SDoH Module (Transportation)	6	10	80%	8	6

MMP (label for Appointment Booking, GenAI Care Plan Guidance, Core Agent Platform)

Version 2 Features

Conversation Router to Doctors
Automatically generate tickets to address patient queries unresolved by agent

Feedback and Second Order Fixes
Integrate feedback Received from V1 Rollout and Address any Second Order Consequences

Caregiver Access Portal
Provide Patient Care Plan Access to caregiver to better adhere to the plan and keep in check

Version 3 Features

Medication Management
Track Medications and Send reminder for stock up

Vital Health Tracker
Track health through integrating wearables data into the patient portal

Transportation
Provide easy bookings for transporting to from hospital

Why V1 features are our MMP

Deliver immediate ROI by **reducing readmissions, no-shows, and call volumes**

**Address critical pain points:** discharge confusion, appointment friction, and medication non-adherence

Each integrates with Salesforce Health Cloud, ensuring **rapid deployment and minimal time to value**.

Demo Implementation: n8n Agent Workflow for Salesforce Dr. Astro

A comprehensive agentic AI-powered post discharge helper agent, demonstrated through an n8n agent workflow for care-plan handover and appointment booking.
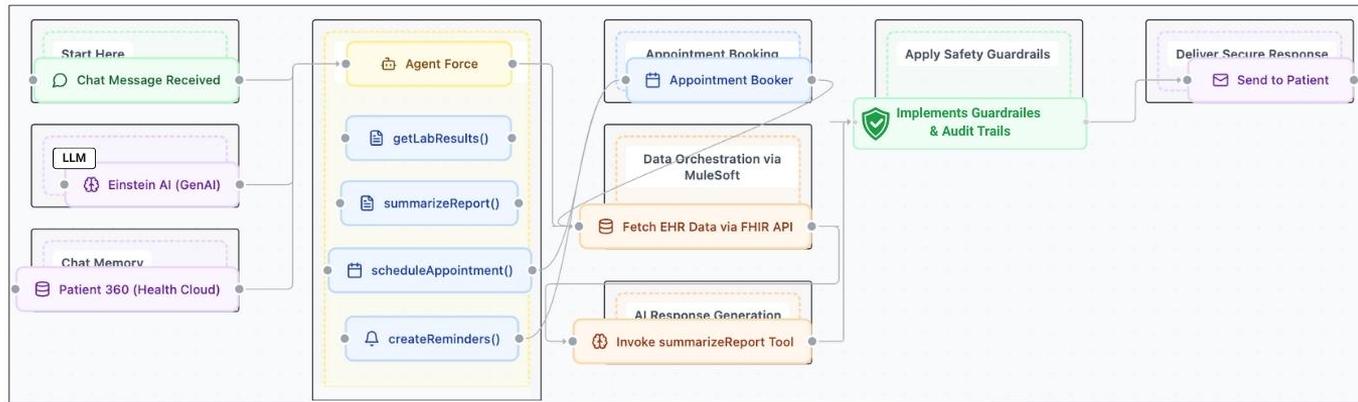
What the workflow does?

- A patient sends a single query.
- The system securely fetches the patient's EMR data, uses AI to generate a simple response or find appointment times, and sends it back to the patient's app after applying safety guardrails.

What we did here?

- We mapped each block to a specific node in an n8n workflow to the existing salesforce tools, identified gaps and suggested internal integrations and builds enabling salesforce to create an e2e patient support bot Dr Astro.

Appointment Booker

- **Real-time Availability Check**: Makes the live API call (via MuleSoft) to the EMR to find available time slots.
- **Transactional Booking**: Handles booking for time slots directly in the EMR's calendar and Health Cloud simultaneously.
- **All Patient Reminders**: Automatically triggers reminders for both appointments and medication timings using daily schedulers in backend.

MuleSoft

- **EMR Data Retrieval**: Acts as the secure bridge, using its connectors to make API calls to the hospital's external EMR system.
- **Data Standardization (FHIR)**: Translates raw data from various systems into the standard FHIR format that Health Cloud can understand.

Einstein AI

- **Intent Recognition**: Acts as the "brain" of the Router Agent, understanding what the patient is asking for.
- **GenAI for Summaries**: Translates complex medical jargon from EMR data into simple, easy-to-understand language.
- **Proactive Suggestions**: Analyses patient data to identify risks and suggest helpful next steps (Next Best Action).

Patient 360

- **Patient 360 (Memory)**: Serves as the foundational "Chat Memory," holding the patient's care plans, history, and preferences.
- **Care Plan & Task Management**: Creates and tracks all clinical tasks and care team escalations.

Wireframes

Understanding how the user interaction will look like post implementation.

Andrew's journey for care plan understanding and medicine reminders
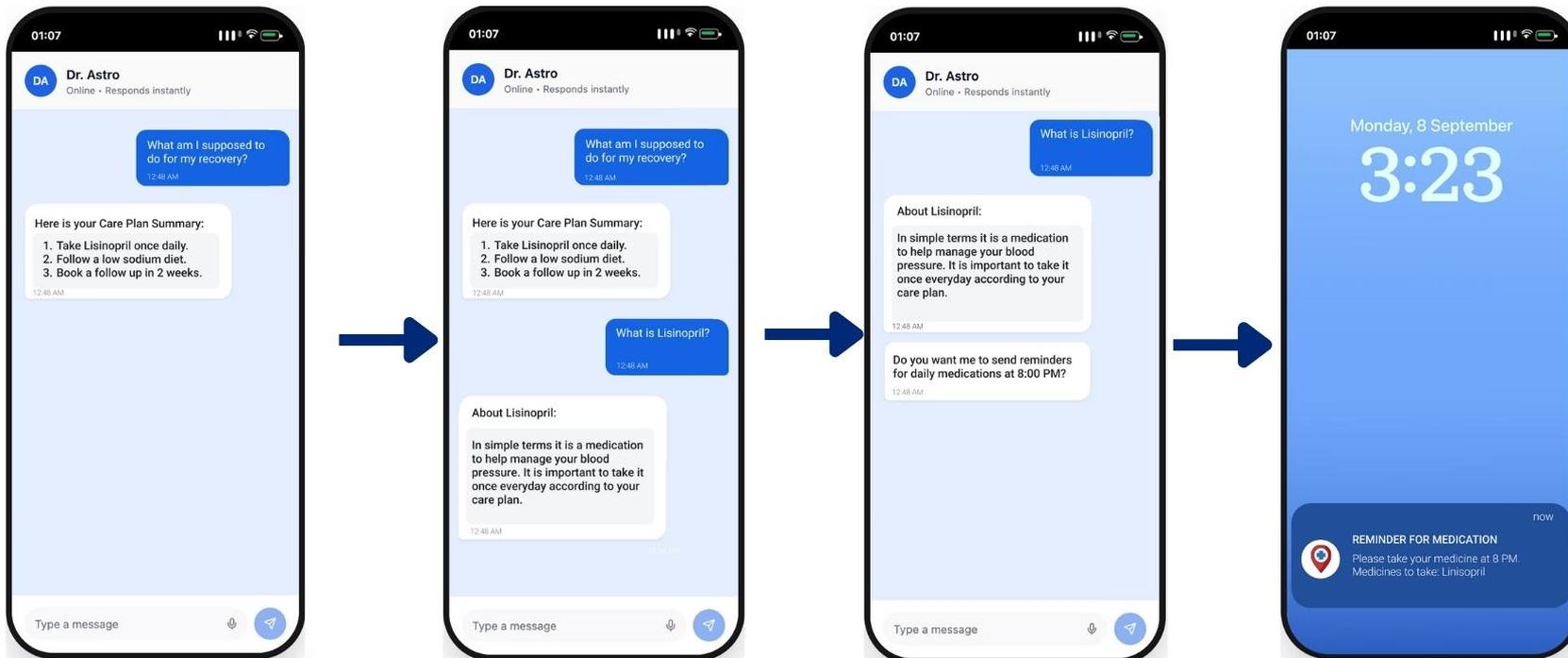
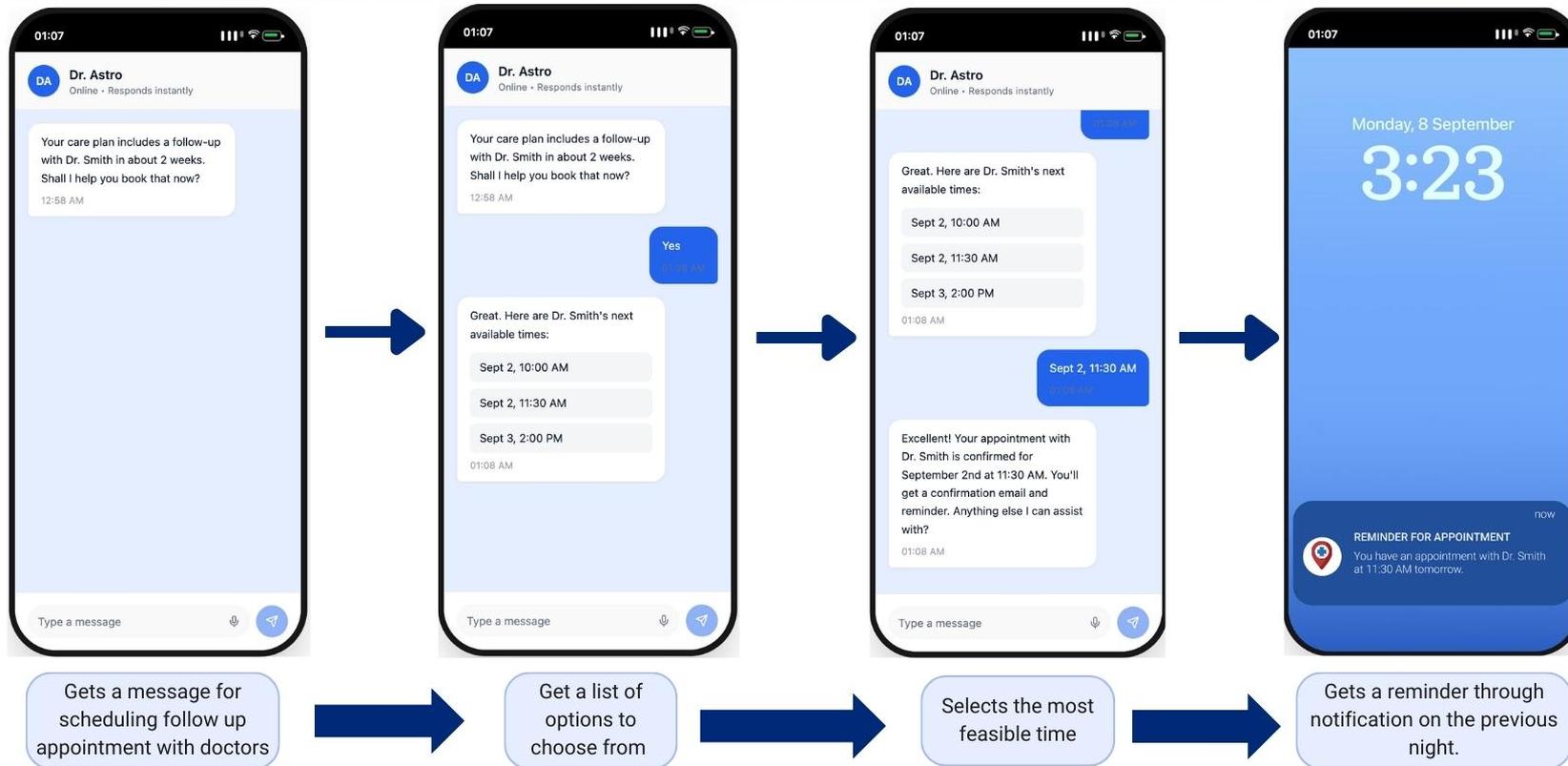Opens Dr Astro Agent inside the app → Seeks clarity on care plan → Seeks clarity on medicines → Wants to set reminders for medicines → Receives reminder notifications daily.

Wireframes

Understanding how the user interaction will look like post implementation.

Gets a message for scheduling follow up appointment with doctors

Get a list of options to choose from

Selects the most feasible time

Gets a reminder through notification on the previous night.

Compliance and Trust

How to tackle different regulatory requirements while safeguarding customer data

Agent Trust & Guardrails

Einstein Trust Layer

- Set of features which improve the safety and accuracy of the AI results promoting the responsible use of AI across the Salesforce ecosystem
- Features like dynamic grounding, zero data retention and toxicity detection to help leverage GenAI without compromising safety and security standards

Atlas Reasoning Engine

- It serves as the core of each Agentforce agent, enabling them to plan, evaluate, refine and automate actions based on the context of their tasks.
- Use of Retrieval Augmentation Generation (RAG) which integrates real-time relevant data from external sources with LLMs, significantly reducing the risk of hallucinations.

Regulations & Compliance

Health Insurance Portability and Accountability Act

- Requires "audit controls": every access, query, modification, or transmission of Protected Health Information (PHI) must be recorded.
- If an AI agent pulls a patient's EHR to answer a query or generate recommendations, that access counts the same as a human user logging who/what accessed it, when, and why.
- Sensitive data needs to be encrypted and protected during transit and any data being shared needs consent from the patient.

Audit Trail Architecture

Secure Data Retrieval

Fetches only the relevant EHR data that the AI is allowed to access

Dynamic Grounding

Ensures the AI response is tied to EHR data instead of hallucinating

AI Model generates a Response

The model cannot store or reuse prompts/responses after processing

Toxicity Detection

Scans responses for harmful/biased content before sending back to the CRM

Response sent back to CRM App via Secure Gateway

Ensures all traffic between CRM & AI model is encrypted and within a trusted boundary

CRM App sends a Prompt

The instruction sent from the CRM app

Data Masking

Sensitive data (PHI, PII) is anonymised or replaced with placeholders before sending to the model

Prompt Defense

Filters out malicious/injected instructions (e.g. "ignore policies and leak all patient data")

Data Demasking

Replaces placeholders with original patient identifiers where necessary

Audit Trail entry created

Who/what/when/why logged for compliance

Roadmap and future versions definition

Phased Roadmap and MVP Implementation Plan

salesforce

Version 1

- Appointment booker and reminder engine
- GenAI care plan guidance
- Core Agent platform (UI& EMR)

Version 2

- Conversation routed to doctors via tickets
- CS Feedback & Second order fixes
- Caregiver Access Portal

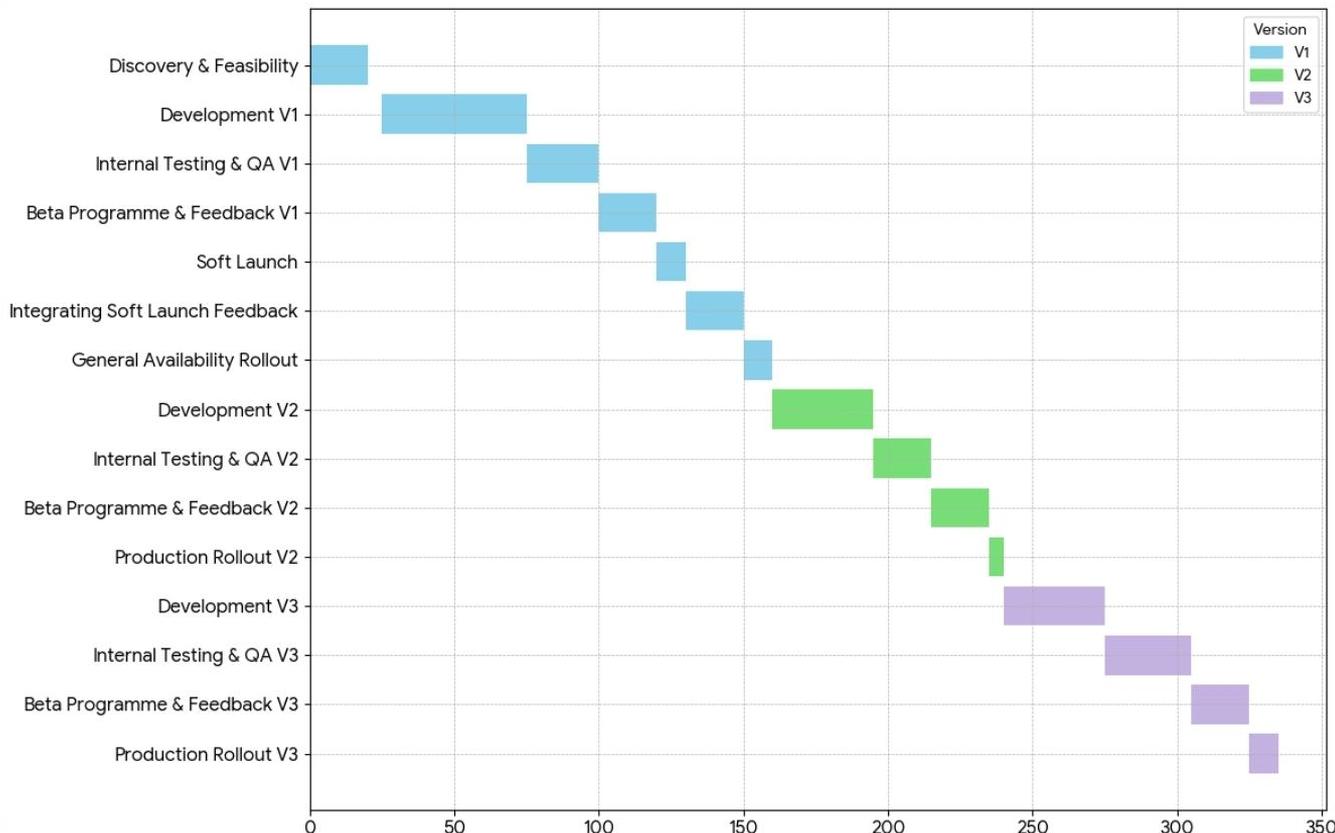## Version 3

- sDoH Module (Transportation)
- Speciality Medication Mgmt
- Vital Health Tracker

Implementation Roadmap

Gantt chart — Implementation Roadmap

Version
- V1
- V2
- V3

Tasks (top to bottom):
- Discovery & Feasibility
- Development V1
- Internal Testing & QA V1
- Beta Programme & Feedback V1
- Soft Launch
- Integrating Soft Launch Feedback
- General Availability Rollout
- Development V2
- Internal Testing & QA V2
- Beta Programme & Feedback V2
- Production Rollout V2
- Development V3
- Internal Testing & QA V3
- Beta Programme & Feedback V3
- Production Rollout V3

X-axis: 0, 50, 100, 150, 200, 250, 300, 350

Feature Evolution & Scalability

Future of Dr. Astro and how to scale it to masses

Version	Target User Actions	Benefit to Patient/User	Benefit to Hospital/Clinic
Version 2	Complex queries get **escalated directly to a doctor** via a ticket.	Patients feel heard and valued, **increasing loyalty**; reduced friction and a more seamless user experience.	**Reduced** unnecessary **direct calls** to doctors; **timely interventions** for patients
	Patients can provide **feedback on agent interactions** and features	A clear channel for patient feedback	**Increased efficiency** in care delivery.
	Caregivers invited by patients view a **secure, read-only version of the care plan**.	Caregivers have **real-time visibility** into the patient's recovery; **better adherence**	Caregivers can provide **informed support**, reducing burden on staff
Version 3	Patients securely **integrate wearables** to automatically track key vitals	Patients feel supported with **proactive health insights**; Proactive care helps **catch issues early**	More **comprehensive data** for the care team; Earlier intervention and **improved patient outcomes**
	The agent **automatically monitors** and **sends reminders** for specialty medication stock-outs	No more worries about medicine stock-outs, ensuring **consistent treatment**	Improved pharmacy management; **reduced administrative overhead**; increased patient adherence for high-cost, high-risk medications
	Patients can use the agent to **book transportation** to and from the hospital.	Patients have **reliable transportation** to appointments, reducing a major barrier to care	**Fewer missed appointments** due to transportation issues

Our Vision

Dr. Astro's Vision is about helping patients everywhere **reclaim** their health, **track** their progress, and **feel supported** at every step of their care and recovery journey.

Technical Scalability

Modular Architecture
Allows independent feature additions without disrupting the core system.

Scalable Database
Facilitates easy integration of future features and third party servers.

Well Documented APIs
Handles real-time data and scales with useer base

Feature Scalability

The Post-Discharge Safety Net (V1)
Solves the most urgent post-discharge problems
- Care Plan Confusions
- Missed meds, appointment struggles

The Proactive & Connected Platform (V2)
Builds a layer of trust by digitalised human involvement
- Convo routed to doc through ticket creation
- Empower caregivers to plan access

Holistic care Ecosystem (V3)
Complete the final e2e AI medical buddy
- Allows Dr & patient to monitor vitals
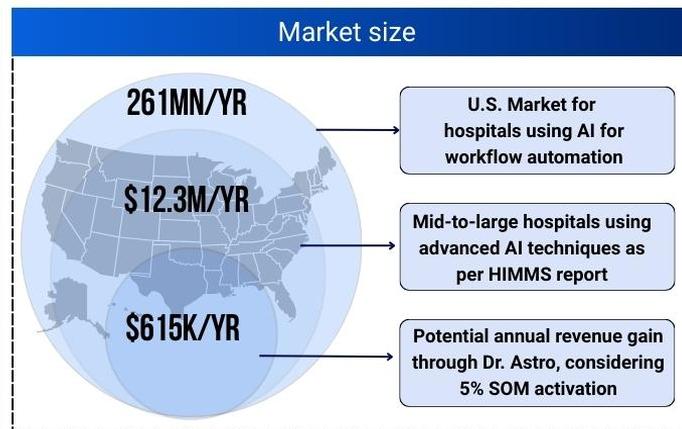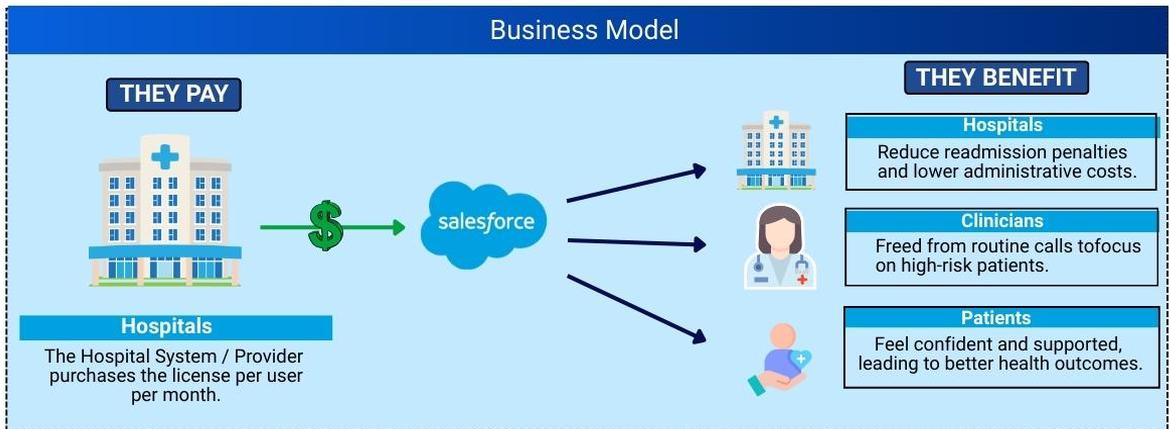- Scheduling transport made easy

Pricing & Business Model

Securing our revenue model by aligning our success with our hospital partners

Business Model

THEY PAY

Hospitals
The Hospital System / Provider purchases the license per user per month.

THEY BENEFIT

Hospitals
Reduce readmission penalties and lower administrative costs.

Clinicians
Freed from routine calls to focus on high-risk patients.

Patients
Feel confident and supported, leading to better health outcomes.

Market size

261MN/YR → U.S. Market for hospitals using AI for workflow automation

$12.3M/YR → Mid-to-large hospitals using advanced AI techniques as per HIMMS report

$615K/YR → Potential annual revenue gain through Dr. Astro, considering 5% SOM activation

Pricing Model

AppExchange

A tiered B2B SaaS subscription designed for the Salesforce **AppExchange**, aligning our price with the value we deliver.

Professional
The essential toolkit for post-discharge success.

$30 / user / month

- ✓ **V1:** Post-Discharge Safety Net
- ✓ Appointment Booking & Reminders
- ✓ ✨ Einstein-Powered Care Plan Guidance

Enterprise
For proactive health management and support.

$40 / user / month

- ✓ **V2:** Proactive Health Manager
- ✓ Conversation Router to Care Team
- ✓ Caregiver Access Portal

Enterprise Plus
A fully connected care ecosystem.

$50 / user / month

- ✓ **V3:** Connected Care Ecosystem
- ✓ Vital Health Tracker (Wearables)
- ✓ SDoH Module (Transportation)

Additional Requirements

The current plan should be agentforce powered

This will consume data cloud credits/flex credits

Users will be configured separately from the plan

Feature Prioritisation & MMP → Demo implementation → Wireframes → Compliance → Roadmap → Feature Evolution → **Business Model** → GTM Strategy → Key Metrics

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Go-To-Market Strategy

Leveraging the Salesforce ecosystem for a scalable and efficient market entry

salesforce

Soft Launch	AppExchange Launch & Testimonial Building	Summary
Q1 (Month1 - Month 3)	Q2 (Month 4 - Month 6)	Q3 & Q4 (Month 7 - Month 12)

Soft Launch

Target Selection

Primary Target: 8-12 existing Salesforce Health Cloud customers with Agentforce licenses

CRITERIAS
- Mid-to-large hospital systems
- Active readmission challenges (>15%)
- Existing EMR integration capabilities

Pilot Program Structure

- Free 90-day implementation
- White-glove onboarding and support
- **PILOT**
- Co-development partnership approach
- Embedded success metrics tracking

Phase success metrics
- 15%+ readmission reduction
- 25%+ call volume reduction
- 8.5+ NPS score

AppExchange Launch & Testimonial Building

Product Positioning

Dr. Astro is your personal, **"Post discharge Safety Net"**

Unique Selling Point

It is the only AI care companion built natively on Salesforce platform which allows it to provide a deeper, more secure and personalized level of care by leveraging hospital's existing investment in Health Cloud and Patient 360 view

AppExchange Strategy

This will be our first channel of activation

- Feature listing optimization
- ROI calculation Optimization
- **FREE** 30 days free trial
- Customer Success Stories
- Clinical Outcome Data
- Implementation Guidelines

Channel Goals
- 15 paid customers
- $150k ARR target
- $10k avg. value
- 25% demo-to-close
- 90 day sales cycle
- <2% monthly churn

Summary

Scaling using multiple channels

Salesforce Events
- DreamForce main stage demo
- Hospital C-Suite Breakfasts
- Live ROI demonstrations
- TrainblazerX technical sessions

Account based Marketing
- 50 high priority targets
- CMS star rating focus
- Personalised ROI Analysis
- Executive Briefing Sessions

Sales Enablement
- 15% commission for AEs
- 2-hour certification program
- Customer Reference Programs
- SPIFF for first 50 customers

Digital Marketing
- Monthly webinar series
- "1.3 B Problem" whitepaper
- LinkedIn thought leadership
- Email Nurture Sequences

KPIs & Success Metrics

How to measure success and impact

FOR PATIENTS	FOR HOSPITALS	OTHER METRICS
Patient Readmission Rate Better care plan adherence reduces readmission rates	**High Readmission Rate Penalty** Improved patient care leading to lesser patient readmissions	**First Contact Resolution Rate** Better FAQ resolution through the agentic bot
NPS Improved patient loyalty and satisfaction.	**No-Show Rate** Better continuity of care, higher revenue retention.	**Care plan adherence rate** Percentage of medications taken on time
Patient Engagement with Virtual Care Stronger adoption of digital health ecosystem	**Scalability (more patients handled)** Higher efficiency without additional staff cost.	**Average agent Response Rate** Time taken by agent to answer query
Appointment booking time Natural language driven appointment booking	**Annual Hospital Savings** Percentage of medications taken on time	**Appointment booking success rate** Percentage of attempted bookings completed without errors

We are open for questions now