

**Gap Analysis Document Template**  
*for*  
**XYZ Clinic Appointment System**

**VERSION 1.0**

*Prepared for*



4/05/2025

*Prepared by*

Blueage Marketing Team

## 1. Document Control

| Version | Date       | Author      | Description   |
|---------|------------|-------------|---------------|
| 1.0     | 08/05/2025 | [Your Name] | Initial Draft |

## 2. Purpose

Describe the objective of the document.

### Example:

This document aims to assess the gaps between the current manual appointment scheduling system at XYZ Clinic and the desired future state, which includes an automated, web-based booking platform.

## 3. Project Overview

- **Project Name:** XYZ Clinic Scheduling System Upgrade
- **Client/Stakeholder:** XYZ Clinic Management
- **Business Analyst:** [Your Name]

## 4. Methodology

Briefly explain how the gap analysis was conducted.

### Example:

The analysis was performed through stakeholder interviews, process observations, system reviews, and benchmarking with industry best practices.

## 5. Current State (AS-IS)

Describe the existing process or system and its shortcomings.

### Example:

- Appointment bookings are made manually via phone.
- Staff enter appointments into spreadsheets.
- Frequent double-bookings and no-show cases.
- No centralized appointment history or reminders.

## 6. Future State (TO-BE)

Describe the desired system, process, or capability.

### Example:

- A web-based system where patients can book online.
- Integrated calendar with availability display.
- Automated reminders via email/SMS.
- Centralized database for all appointments.

## 7. Gap Analysis Table

| Area/Function        | Current State (AS-IS)          | Future State (TO-BE)                | Identified Gap                                | Impact Level | Recommendation                                 |
|----------------------|--------------------------------|-------------------------------------|---|--------------|--|
| Booking Method       | Phone-based, manual entry      | Online self-service via website     | No self-service or automation                 | High         | Implement web-based booking system             |
| Data Entry           | Excel sheets with manual input | Centralized digital database        | Lack of real-time access and error-prone      | Medium       | Migrate to a centralized platform              |
| Notifications        | Manual calls/reminders         | Automated SMS/email alerts          | No automated reminder system                  | High         | Integrate notification service (e.g., SMS API) |
| Availability Display | Hidden, internal only          | Public-facing calendar for patients | Patients can't view or choose preferred slots | High         | Build availability UI into system              |
| Reporting            | Manual count from Excel        | Automated reporting dashboard       | Time-consuming and error-prone                | Medium       | Add analytics and dashboard features           |

## 8. Gap Summary

Provide a summary of critical gaps and their potential impact if unaddressed.

**Example:**

The lack of an automated booking and reminder system significantly affects patient experience and operational efficiency. Addressing these gaps is critical to reducing no-shows, optimizing staff time, and improving data accuracy.

**9. Recommendations**

Outline actionable steps to bridge the gaps.

- Develop or procure an online scheduling platform
- Integrate automated SMS/email systems
- Train staff on new digital workflows
- Establish backup procedures for system downtime

**10. Approval**

| Name               | Role                  | Signature | Date |
|--------------------|-----------------------|-----------|------|
| Ayo Bayo           | Project Manager       |           |      |
| Shege Bin          | Client Representative |           |      |
| <i>[Your Name]</i> | Business Analyst      |           |      |