



# The post-call center era: How intelligent automation can reduce call volumes and increase patient satisfaction

Learn data-driven insights about why the call center must be re-imagined, how intelligent automation can power patient access workflows, and how to identify top use cases for automating your call center.



Bri Buch  
Patient Access Solutions Lead

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# Learning objectives

**1**

**Review the role of the call center in healthcare organizations, and understand how current market forces are affecting operations**

**2**

**Learn about intelligent automation, and how it can transform call center operations**

**3**

**Discuss best practices for introducing automation to support patient access workflows**

# Agenda

- 01 | Why the call center must be reimaged to meet today's needs
- 02 | A new approach to optimizing the call center
- 03 | Best practices for transforming your call center
- 04 | Case study
- 05 | Q&A

# Today's speaker



*Bri Buch*  
Lead, Access Solutions  
Notable

## About Bri Buch

At Notable Health, Bri leads solutions development in patient access and digital engagement, applying automation and AI/ML to transform how patients get care.

Bri previously served as a consultant and strategic advisor to over 20 leading healthcare organizations on digital health transformation and digital front door strategy.

Prior to this, Bri worked at Epic Systems and as an Epic consultant, leading EHR installations around the globe. She was integral to the debut of Epic's predictive analytics suite, launching the first five AI analytics models for Epic customers and training internal teams on commercialization and deployment.

Bri holds degrees in Public Health and Economics from the College of William and Mary, a Master's degree from the London School of Economics, and a certificate in Managing Innovative Technology from the University of Oxford.



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# The role of the call center

**What role does the call center play in your organization?**

# Aligning on the role of the call center

Three critical roles that call centers play in healthcare delivery

## Manage inbound requests

Serve as “switchboard operators” to triage calls to the appropriate provider, department, individual, or patient room

## Support clinical care

Power nurse advice lines, disease management programs, and marketing campaigns for health programs

## Perform administrative tasks

Complete manual workflows that support the patient journey, from scheduling and registration to billing and collections

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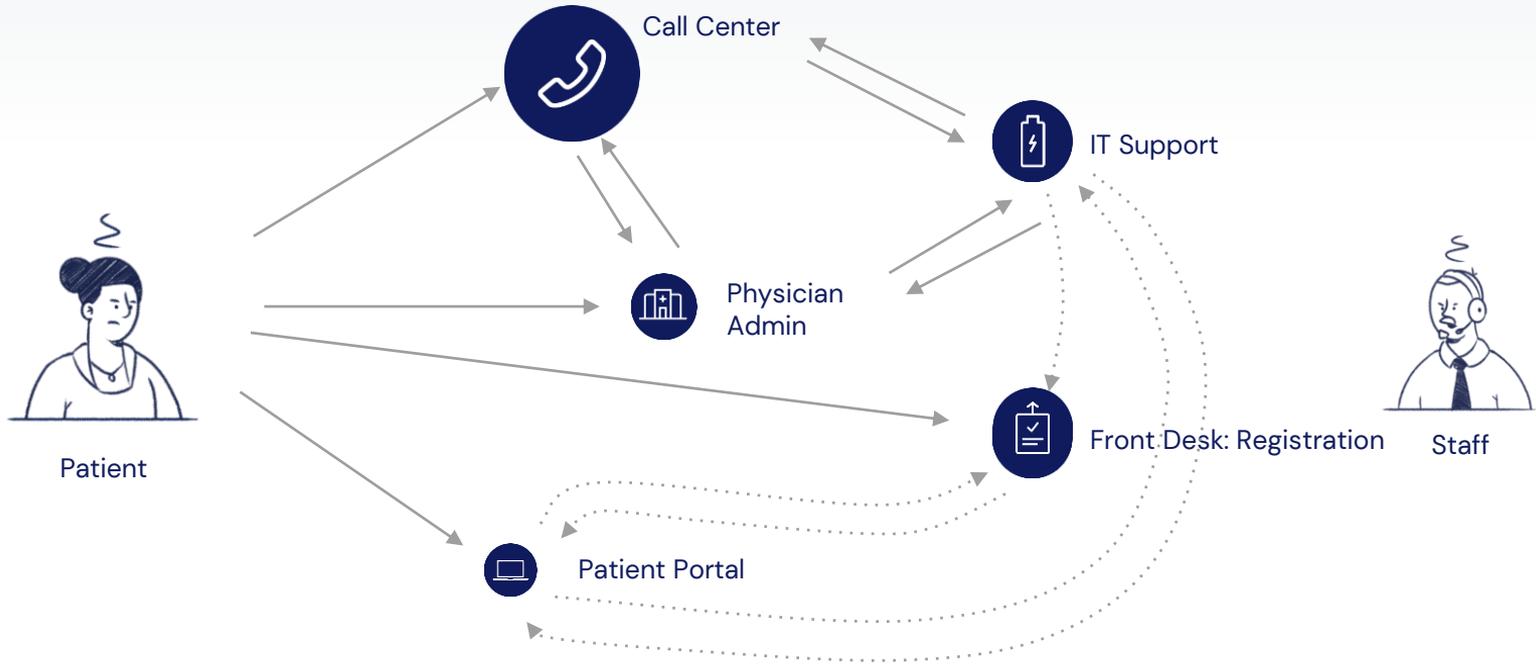
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*Patient's first impression of the organization*

# “All roads lead to the call center”



# Most patients prefer digital experiences over phone calls

Failure to execute effectively leads to patient dissatisfaction and leakage

**61%**

of young patients would consider switching providers over a poor digital experience

**20%**

of patients have given a negative review of a provider because of a poor digital experience

**50%**

of patients say that a poor digital experience “ruins the entire experience” with their provider

# Common challenges we hear from our partners

## Staffing challenges

- ▶ Hiring, training, and retaining staff in high-turnover positions increases costs for the organization.

## Evolving patient expectations

- ▶ Growing preferences for digital engagement in place of calling in compromise the patient experience.

## Outcomes misalignment

- ▶ Tensions exist between the need to manage costs with the need to improve quality of engagement.

## Patient routing

- ▶ Increasingly complex customer service channels and specialty care lead to directing patients to the wrong care.

**45%**

Annual call center staff  
turnover rate

**1/2x to 2x**

Annual salary to replace each  
employee

**What additional challenges exist in today's call center?**

# The call center is a primary area of opportunity for healthcare systems

Call centers alone previously served as the front door for patients into the health system

...but this is no longer feasible due to shifting market forces

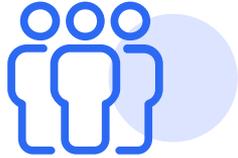


Consumer Expectations

Digitization Impact on Workload

Staff Vacancies

# Call center transformation: Opportunity for impact



Increase access to care



Increase patient acquisition, satisfaction, and retention



Increase operational efficiency and reduce costs

# Common technology pitfalls

# Status quo technologies have failed to drive this shift

Incremental productivity gains on their own do not enable transformational impact



## CRM

Does not change how patients interact with staff



## IVR

Compromises the patient experience



## Chatbots

Fail to meet patient needs without manual intervention; time consuming

# Front-end solutions create more back-end work

Many digital engagement technologies increase downstream work for staff



## Patients



### Chat bot scheduling:

Patients can chat with an agent to book an appointment.

### Digital registration:

Patients complete digital forms prior to their visit.

### Appointment reminders:

Reminders to patient prior to their appointment and option to indicate arrival.



## Staff



### Manual back-end scheduling:

Agents must confirm scheduling availability in the EHR and contact patients to reschedule if they book with the wrong provider.

### Manual back-end data entry:

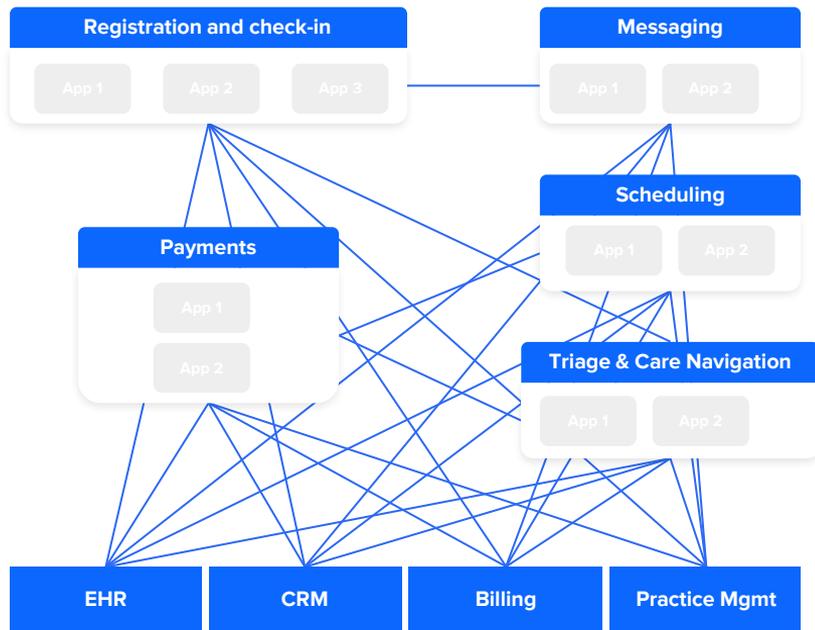
Staff must take outputs from digital PDFs and re-enter data into discrete fields in the EHR.

### Navigation across multiple interfaces:

Staff must manage a separate portal with patient confirmation, cancellation, and rescheduling appointments outside of the system of record

# Orchestrating multiple point solutions

Point solutions for individual workflows can create more harm than good.



## Disjointed patient experience

- Multiple passwords, apps and logins
- Repeated manual data entry
- No consistent experience across channels

## More work for staff and providers

- Learning new tools
- Navigating across multiple screens / interfaces
- Troubleshooting with patients
- Lengthy workqueues

## Long and expensive IT projects

- Lengthy HL7 interface + FHIR API development
- Multiple vendors to manage
- Complicated maintenance and change management

# Optimizing the patient access experience with intelligent automation

# Reimagining the role of the call center

From manual, reactive call centers to personalized, digital patient service centers

## Call center

### **Reactive:**

All requests from patients and of patients rely on inbound/outbound calls from staff

### **Undifferentiated:**

Generic, repetitive experiences increase patient frustration and increase risk of churn

## Patient service center

### **Proactive:**

Self-service, automated digital engagement eliminates the underlying work that agents need to perform

### **Differentiated:**

Personalized, high-touch engagement across in-person and digital channels improves patient acquisition and retention

# Patient service centers require a new technology approach

## Call center

**Increase agent productivity**  
by implementing technologies  
and workflows that drive  
incremental improvements

### Impact

- Marginal increase in productivity
- Minimal impact on patient satisfaction

## Patient service center

**Eliminate calls upstream**  
by removing the need for more than  
50% of calls – freeing agent time for  
high touch, personalized service

### Impact

- Substantially reduced operating costs
- Transformational impact on the patient experience

# How intelligent automation eliminates calls upstream

Reason for Call	Eliminating the Call with Intelligent Automation
<p><b>Scheduling</b> Field inbound calls from patients and direct them to the right site of care</p>	<ul style="list-style-type: none"><li>● Collect symptoms and insurance card via digital experience</li><li>● Leverage AI to determine appropriate site of care based on clinical indication and insurance coverage</li><li>● Surface one-click scheduling for patients or direct them to the ER</li></ul>
<p><b>Registration</b> Collect information needed from patients in advance of their visit</p>	<ul style="list-style-type: none"><li>● Use AI to scan patient records in the EHR and determine what information they need to complete</li><li>● Configure and send personalized digital conversational intakes via SMS / email</li><li>● Leverage digital assistants to automatically populate the EHR with data collected from patients</li></ul>
<p><b>Authorizations</b> Contact payers to request authorizations for services, while managing updates for patients</p>	<ul style="list-style-type: none"><li>● Analyze payer information to determine the need for an authorization</li><li>● Use digital assistants to log into a payer portal or submit an efax to request authorization</li><li>● Leverage machine vision to analyze the payer portal for a response</li><li>● Once completed, provide patients with digital notification that directs them to self-service scheduling</li></ul>

# Intelligent automation powers the transformation from call center to patient service center

## Artificial intelligence

Determines when and how to perform call center workflows

## Robotic process automation

Performs automated workflows by clicking into EHR fields, typing notes, or uploading documents just like an agent

## Omnichannel patient engagement

Empowers integrated digital communication across any modality

## Custom configurability

Enables governed development of custom automations to meet the unique needs of different specialists, payers, and other variables

# Best practices for automating your call center

# Three steps to automating your call center



## Strategic KPIs to optimize for

- ▶ # of inbound calls reduced
- ▶ # of outbound calls reduced
- ▶ Agent / staff time saved
- ▶ Reduction in mean time to resolve (MTTR)
- ▶ Error reduction

# Defining the highest ROI workflows to automate

1

Perform an analysis of all current inbound and outbound call volume, segmenting out different types or reasons for high volume calls

2

Use the total time spent on each type of call as a general proxy for potential ROI for automation

3

Assess what % of current call volumes per segment could be reasonably automated

# Additional factors to consider

- ▶ **Complexity:** Can the task be broken down into repeatable, standardized steps? How easy or difficult is it to train agents to effectively perform the task?
- ▶ **Patient impact:** How much value does a human touchpoint add or subtract from the interaction?
  - ▶ Appointment reminders vs. payment collection
- ▶ **Cost of error:** How much value is lost when agents make mistakes?
  - ▶ Back-end denials caused by front-end registration errors create downstream costs.
- ▶ **Difference in performance:** How much more or less effectively can the workflow be performed by a person vs. by automation?

# Implement supporting technology, measure impact, and iterate on approach

## Evaluate and plan

- Decide first automations to implement
- Define expected ROI
- Align on partner and approach

## Implement

- Formalize governance structure
- Implement first automation(s)
- Measure ROI

## Measure

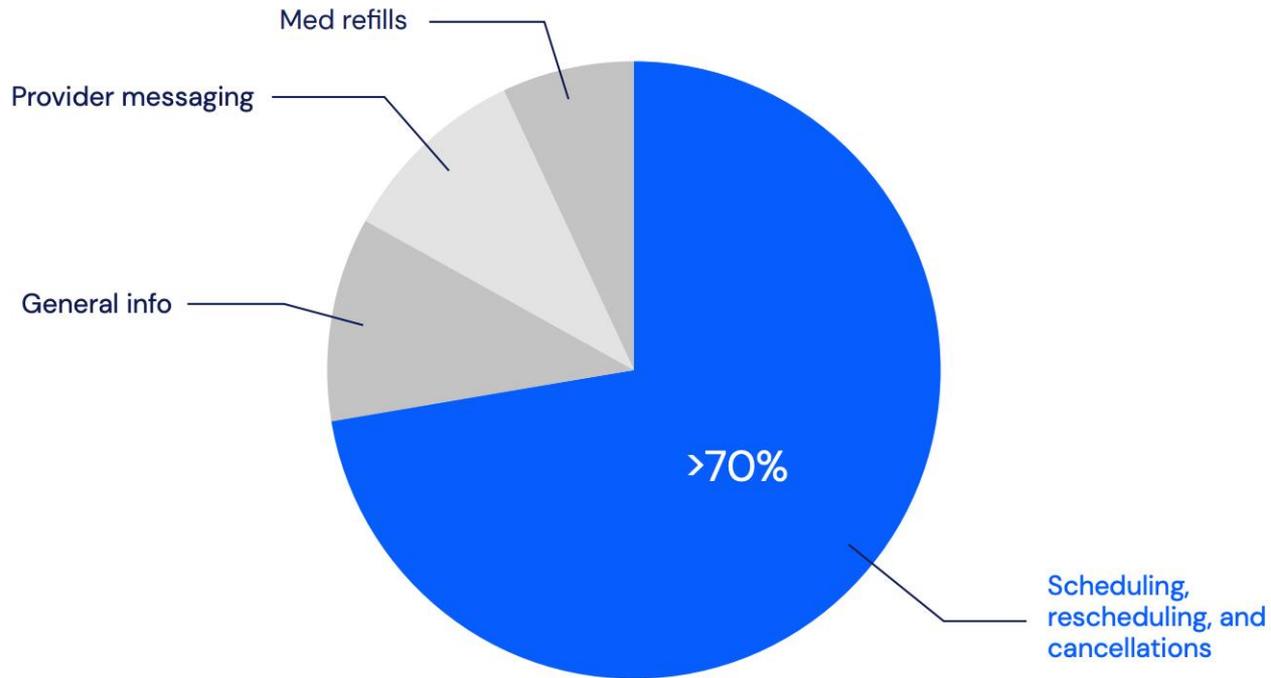
- Use results and learnings to scale across multiple lines of business
- Formalize center for enablement and initiate citizen development
- Re-evaluate and consolidate technologies

## *Iterate*

- Enable all parts of the organization to automate via federated citizen development model
- Revisit and optimize previously established automations

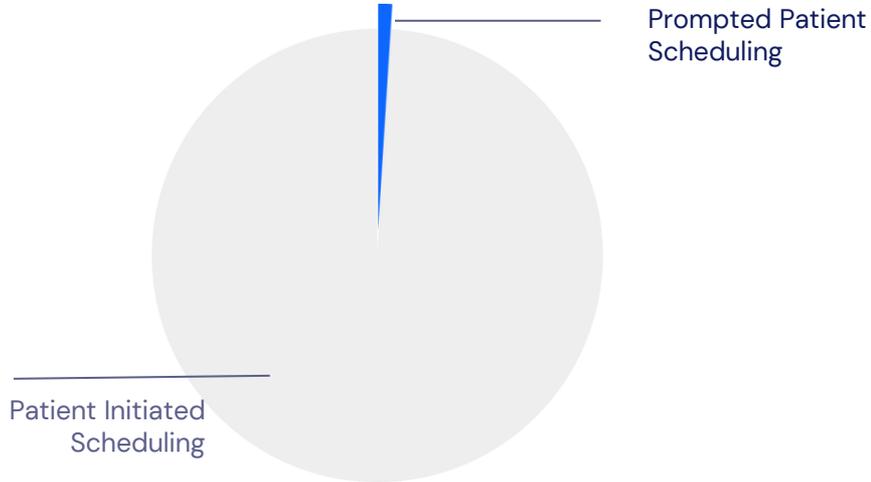
# Example and Case study

## Example: Automation assessment for call center

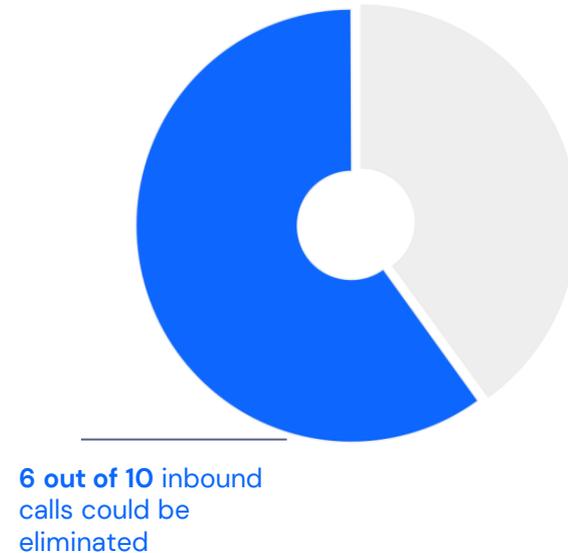


# Example: Automation assessment for call center

Only 1% of visits today initiated through outbound scheduling...



Yet ~60% of inbound calls to schedule could be prevented through automated outreach



## Intelligent Scheduling: Outbound

# Proactively nudge patients to receive needed care

## Retain patients across the care journey

Proactively send outreach to patients who may be lost to follow-ups to decrease unaddressed care gaps, delays in treatment, and patient leakage

- ▶ **Intuitive Routing**

Dynamically validate that the patient is scheduling the right appointment with the right provider

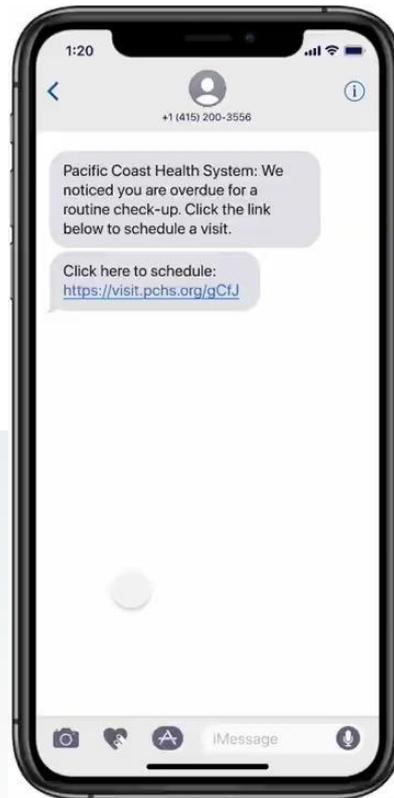
- ▶ **Real-Time Patient Matching**

Present demographic and insurance information to patients for confirmation

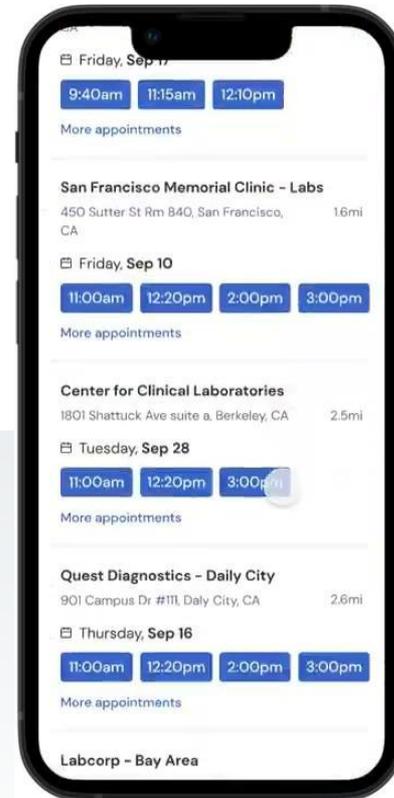
- ▶ **Real-Time Eligibility Verification**

Ensure coverage upfront to reduce denials and delayed payment

Care gap outreach scheduling



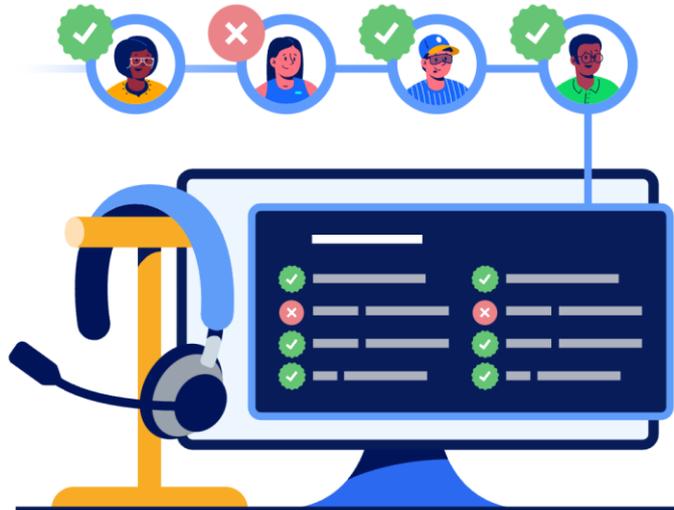
Orders-based scheduling



# Remove scheduling-related administrative burden

Eliminate backend work queues for staff

...using the EHR as the single source of truth



Respects predefined appointment template rules



Books the correct appointment slots



Removes downstream patient reconciliation workflows

# Partner overview

## Mid-sized healthcare system in Southwest

Employed providers

**350**

Annual encounters

**1,100,000**

EHR

**Epic**

## Strategic goals

- ▶ Improve patient and staff experiences with touchless registration
- ▶ Increase provider capacity and decrease burnout by minimizing documentation burden
- ▶ Respond to COVID-19 with speed and agility by screening at-risk patients prior to their appointment and assigning government coverage where appropriate

## Challenges

- ▶ Registration presented a huge administrative burden with staff managing many manual processes
- ▶ Patients dissatisfied with navigating the call center to manage their care
- ▶ Only 20% to 25% of established patients completed pre-visit registration via Epic MyChart
- ▶ Claim denials disproportionately driven by inaccurate registration data

# Modernizing the call center with intelligent automation

- ▶ **Call elimination:** Automated outreach for digital registration and appointment reminders eliminated the need for call center agents to manage these processes
- ▶ **Work queue reduction:** Digital assistants perform manual tasks in the EHR based on pre-configured rules
- ▶ **Reduced denials:** AI-powered payer-plan matching and patient data collection outperformed staff, reducing downstream denials caused by errors or typos

**83%**

Reduction in eligibility- and registration-related denials

**223,000**

Calls eliminated annually

**635,000**

Workqueue items eliminated

**78%**

of patient registrations require zero staff contact

**94%**

Patient satisfaction rating

# Key Takeaways

# Key takeaways

- ▶ Call center transformation requires organizations to pivot from marginal improvement of agent efficiency to **reducing the number of calls agents need to manage**.
- ▶ A digital front door, powered by intelligent automation, can address the reason for most calls upstream, **freeing up staff capacity for higher-value work**.
- ▶ To prioritize which call center workflows to focus on automating, assess **call volume, average MTTR, impact on patient experience, and revenue impact**
- ▶ Ensure that your technology approach **does not create administrative burden** for your staff or IT teams.

Questions?