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# AI Powered Personalization and Engagement

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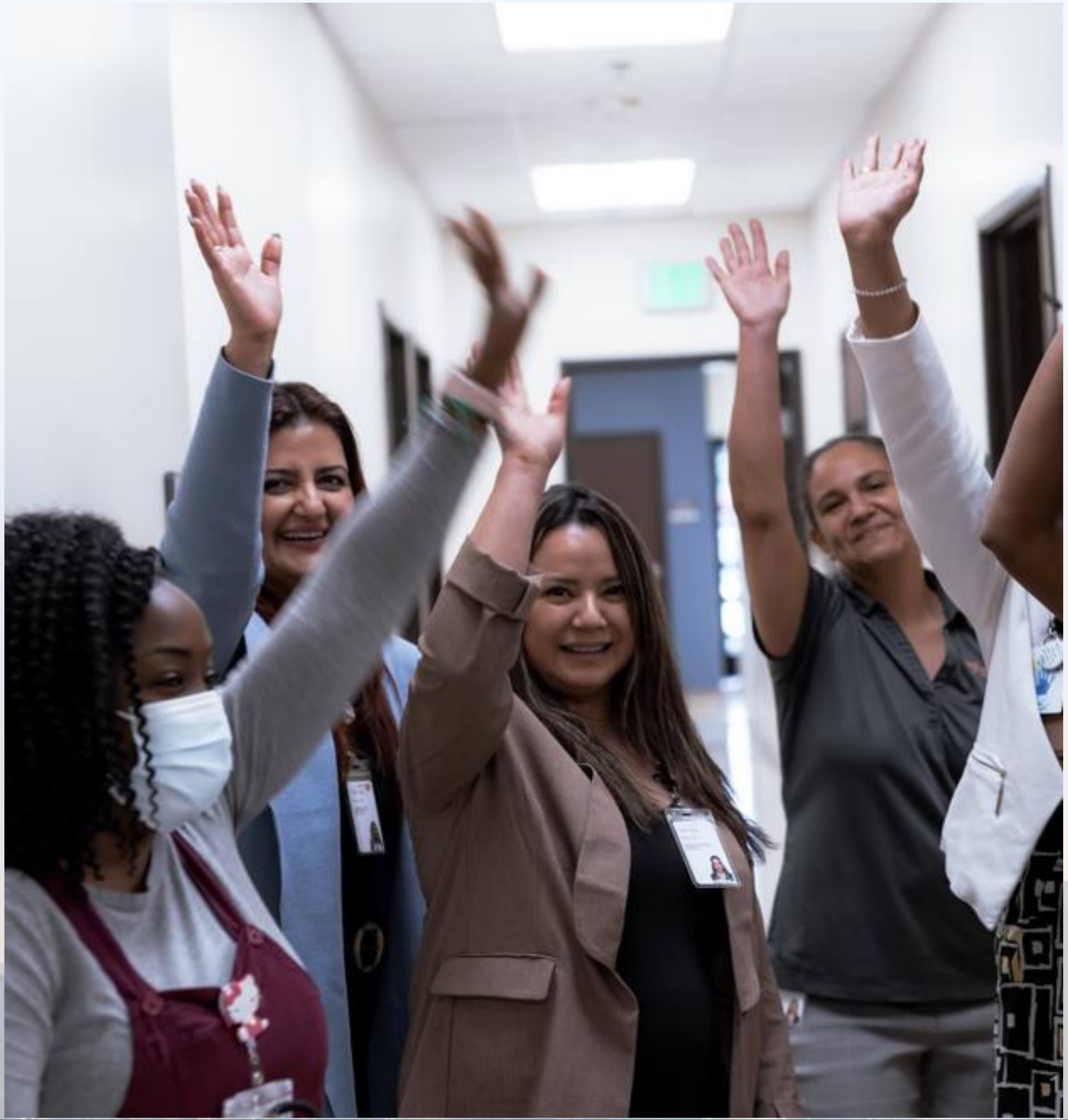
Director of Patient Navigation Center
May 2, 2024

# Agenda

- Introduction to NHC
- Call Center Structure + Challenges
- AI Implementation
- Agent Empowerment
- Q & A



# Mission

To improve the health and happiness of the communities we serve by providing quality care to all, regardless of situation or circumstance.

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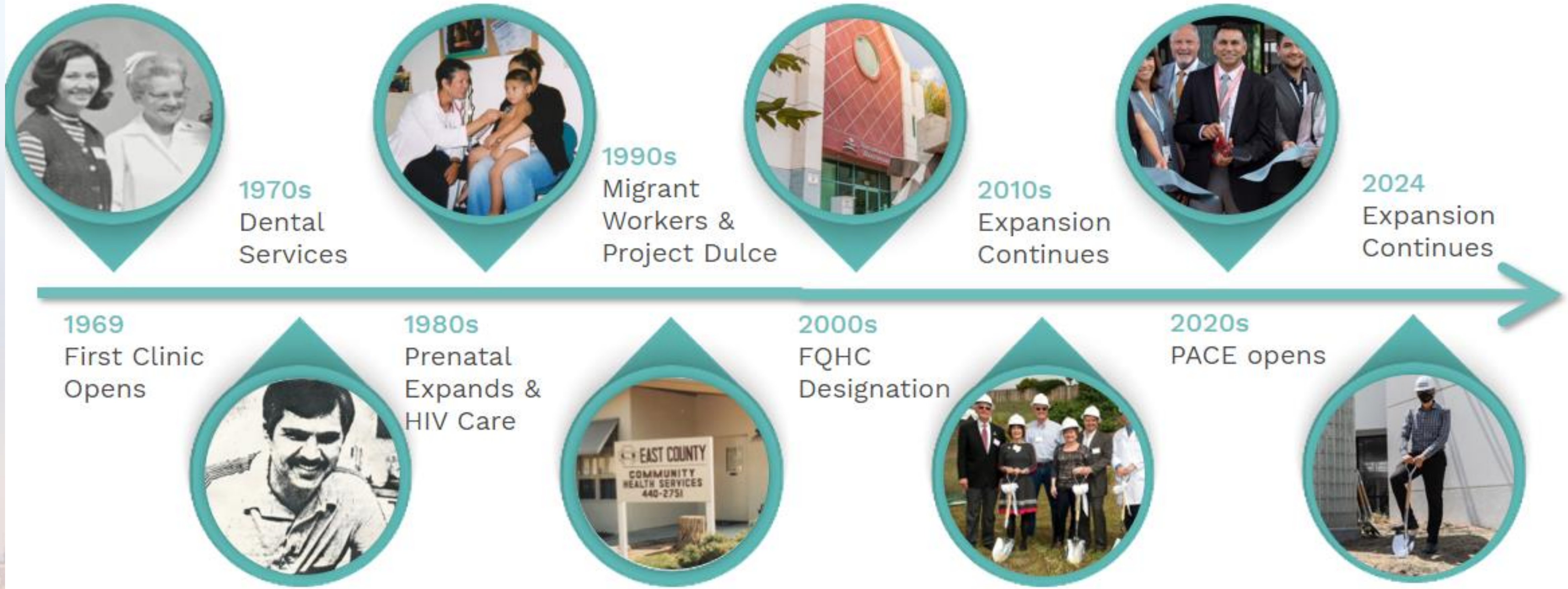
# FQHC - 50+ Years as a Safety Net Provider for Vulnerable Populations



**1969**
First Clinic Opens

**1970s**
Dental Services

**1980s**
Prenatal Expands & HIV Care

**1990s**
Migrant Workers & Project Dulce

**2000s**
FQHC Designation

**2010s**
Expansion Continues

**2020s**
PACE opens

**2024**
Expansion Continues

EAST COUNTY
COMMUNITY HEALTH SERVICES
440-2751

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# By The Numbers

Number of visits CY 2024

506,563

**Patients: 96,867**
**Children: 24,399**
(17 & under)

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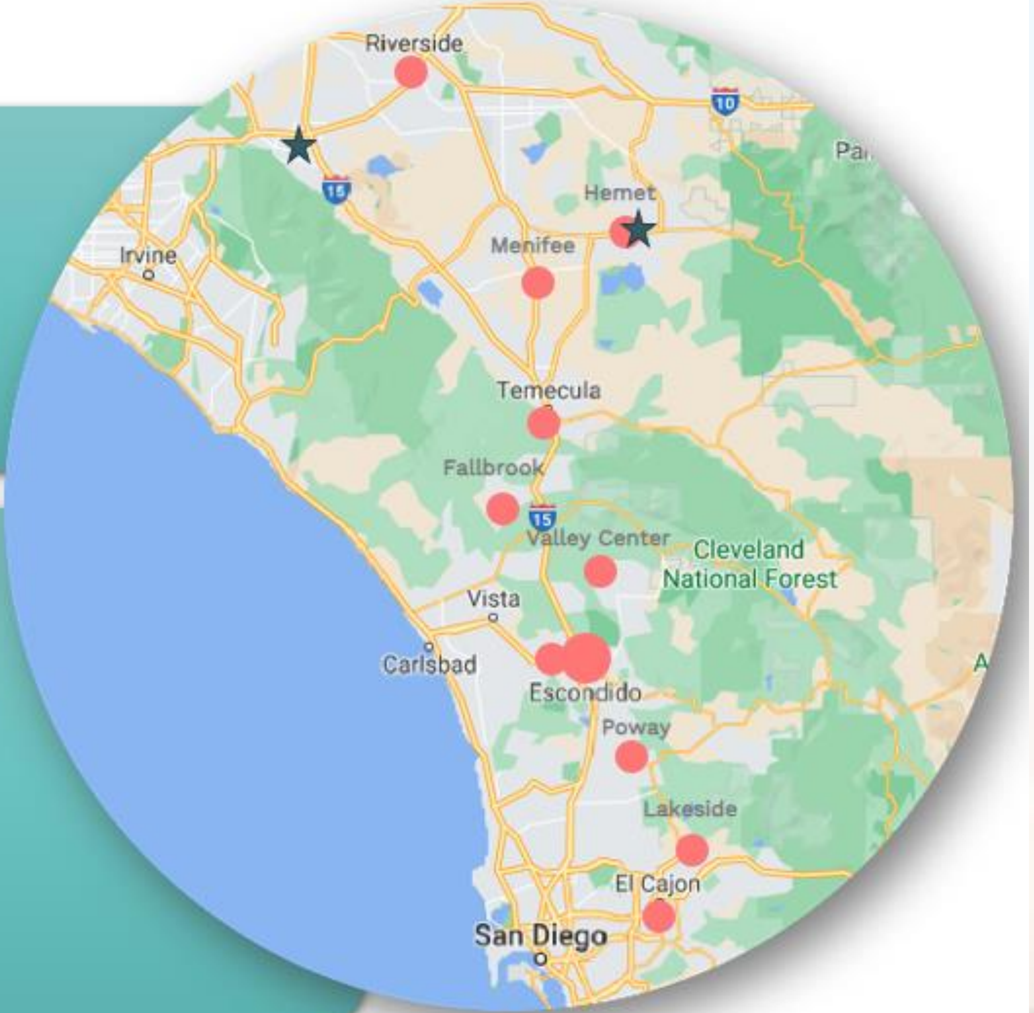
# San Diego & Riverside County

## Riverside County

- Corona
- Hemet
- Menifee
- Murrieta PACE
- Riverside (4)
- Riverside PACE
- Temecula (2)

## San Diego County

- Escondido (8): Date | Downtown | Elm | Interfaith
  Valley Parkway | Ohio | Prenatal | Pediatrics
- Valley Center
- Fallbrook
- El Cajon (2)
- Poway
- Lakeside
- San Marcos


Riverside
10
Pa
15
Irvine
Hemet
Menifee
Temecula
Fallbrook
15
Valley Center
Cleveland National Forest
Vista
Carlsbad
Escondido
Poway
Lakeside
El Cajon
San Diego

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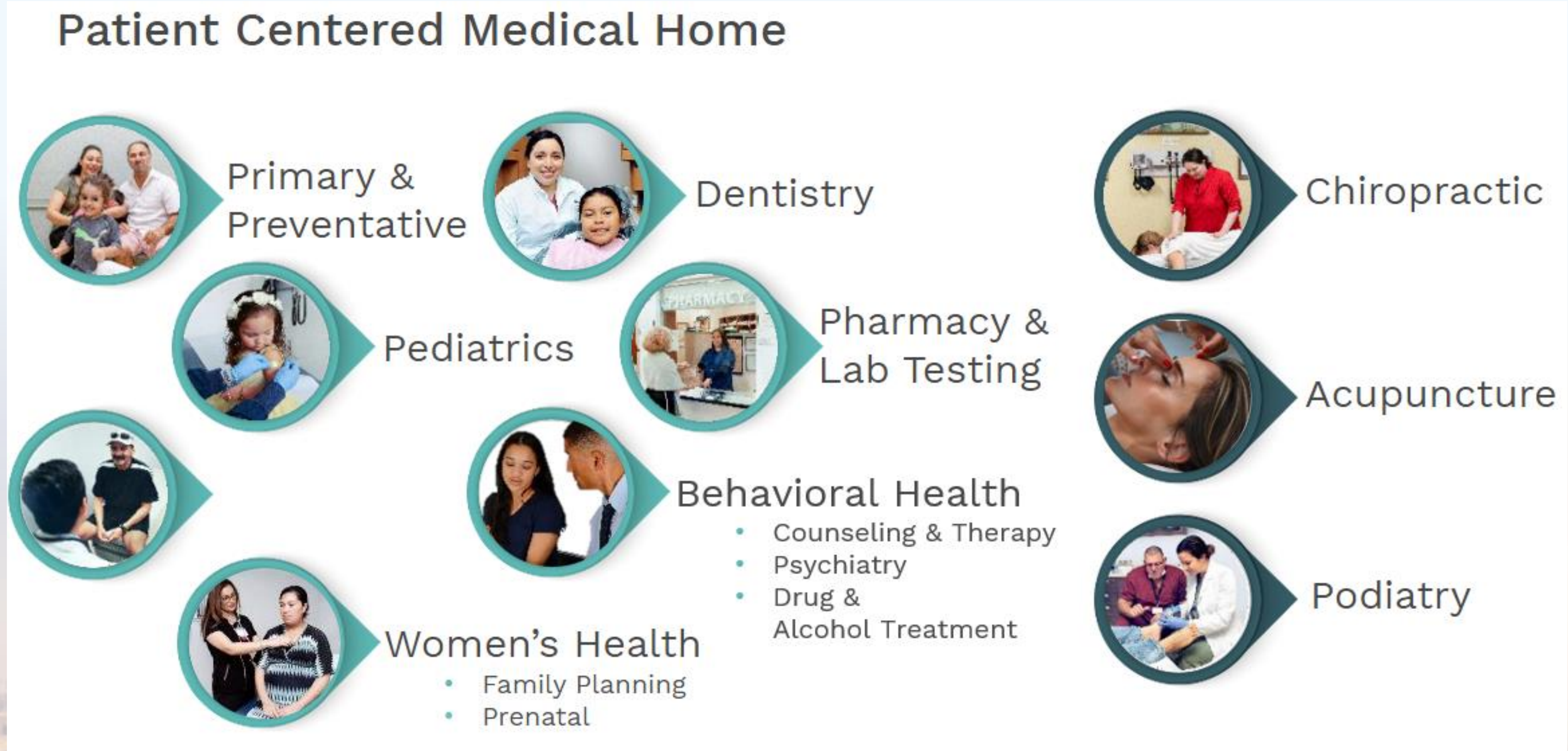


## Patient Centered Medical Home

Primary & Preventative

Dentistry

Chiropractic

Pediatrics

Pharmacy & Lab Testing

Acupuncture

Behavioral Health

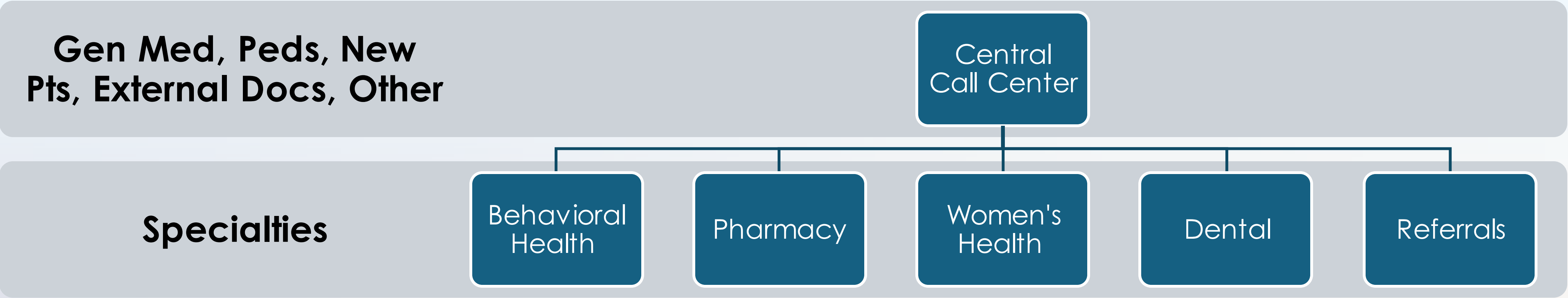
- Counseling & Therapy
- Psychiatry
- Drug & Alcohol Treatment

Podiatry

Women's Health

- Family Planning
- Prenatal

# Call Center Structure


Gen Med, Peds, New Pts, External Docs, Other
Central Call Center
Specialties
Behavioral Health
Pharmacy
Women's Health
Dental
Referrals

**Staffing**

- 70+ Call Center Reps
- Sr. Manager, Manager, Supervisor, Team Leads

**Volume**

- 550,000 Calls Annually

# Call Center Challenges

**Patient Experience**

- Long wait times [30+mins 2021], outdated system, unhappy patients [40% abandon rate 2021]

**Employee Experience**

- Lack of tools, manual reports, training length [8 weeks 2021]

**NHC Growth**

- New sites and services, increased volume of calls {300,000 2021 vs 500,000 2023]

# Creating a Strategy

## Increase Patient Experience

Decrease Waiting Time

Decrease Abandonment Rate

Streamline call process for first call resolution

## Increase Employee Experience

Provide effective tools for employees in real time during patient calls

Remove repetitive tasks from employees so they can focus on addressing patient issues

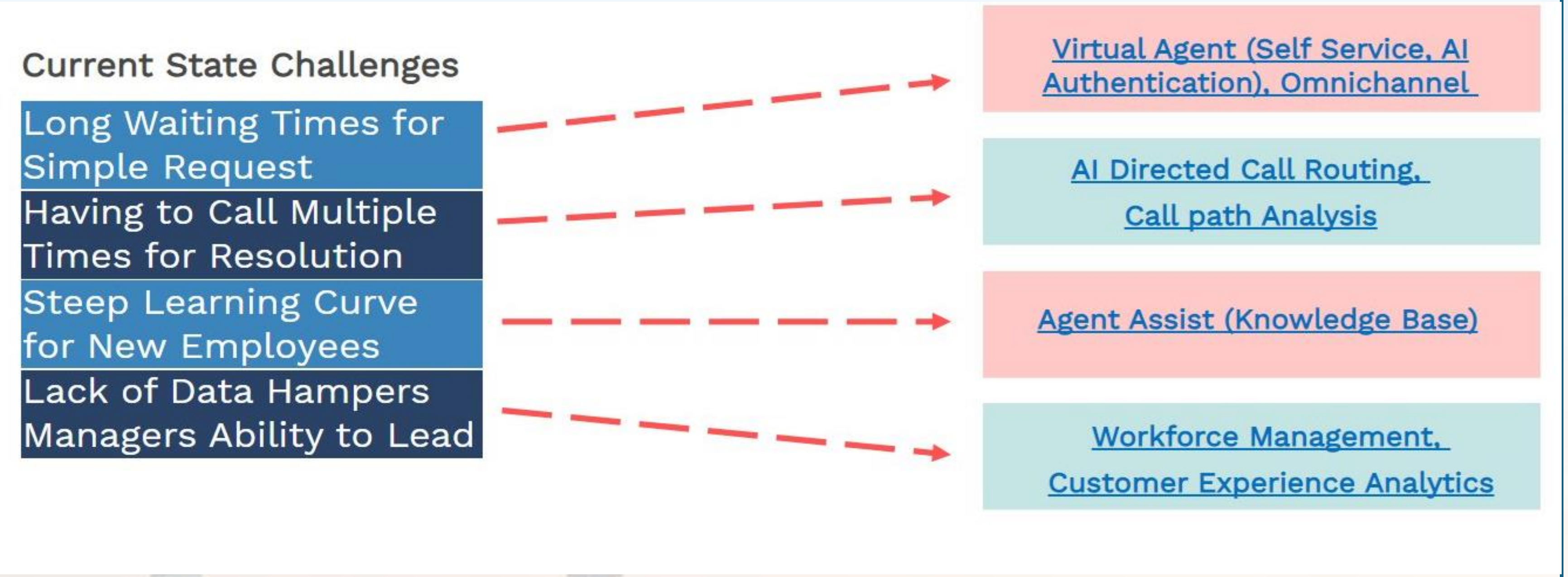
## Equip Managers to Lead

Provide real-time, specific data of individual employee performance so managers can supervise and support with purpose

Allow managers to spot overarching trends so change can be implemented quickly

# Why AI?

- **EHR Integration**
- **Phone Compatibility**
- **Tools + Cost**
- **Address Wait Time + Abandon Rate**



Current State Challenges

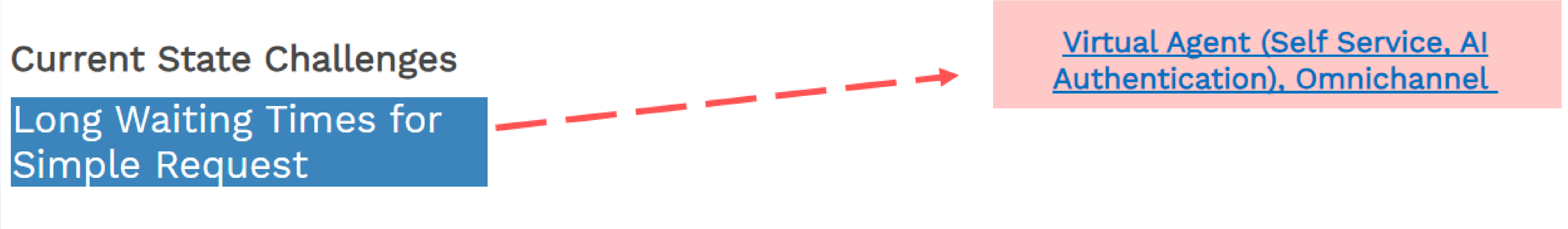
Long Waiting Times for Simple Request → Virtual Agent (Self Service, AI Authentication), Omnichannel

Having to Call Multiple Times for Resolution → AI Directed Call Routing, Call path Analysis

Steep Learning Curve for New Employees → Agent Assist (Knowledge Base)

Lack of Data Hampers Managers Ability to Lead → Workforce Management, Customer Experience Analytics

# Tools to Personalize Experience

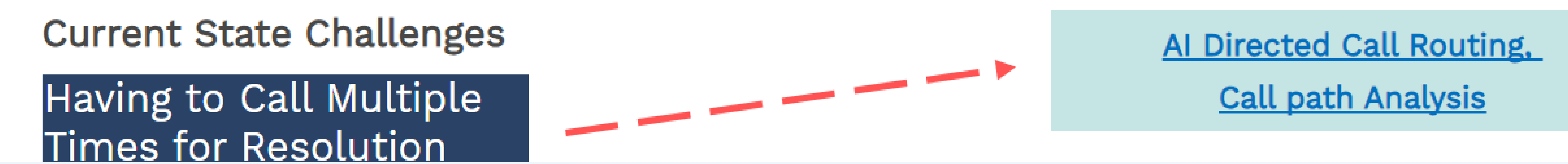


Current State Challenges

Long Waiting Times for Simple Request

Virtual Agent (Self Service, AI Authentication), Omnichannel

- Available 24/7
- Includes call back option to keep patient in queue
- Can remove simple requests like making appointments, cancelling appointments, directions, etc. from the queue

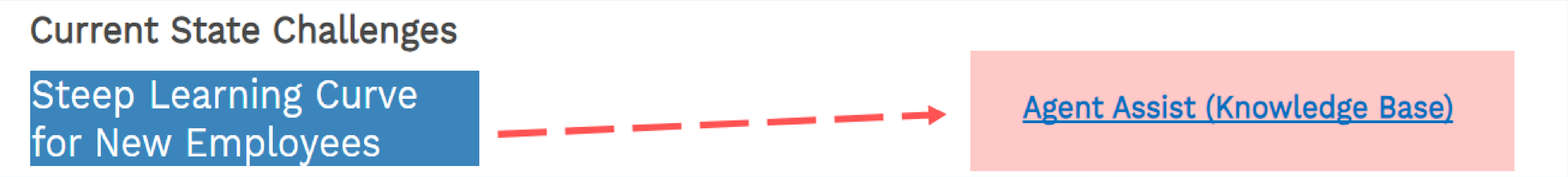


Current State Challenges

**Having to Call Multiple Times for Resolution**

AI Directed Call Routing, Call path Analysis

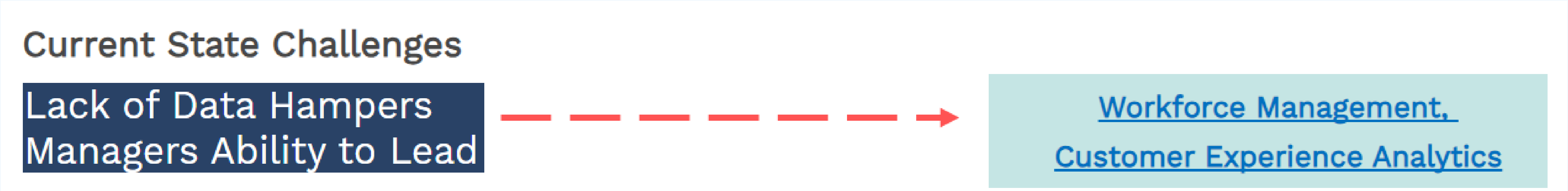
- Smarter phone tree
- Reduce time to options
- Reduce transfers due to being placed in wrong queue
- Improves over time as trends indicate opportunities for process improvement
- Call path changes can be implemented in real time



## Current State Challenges

Steep Learning Curve for New Employees → Agent Assist (Knowledge Base)

- Streamlined process to locate information as needed
- Policies/procedures/scripts can be updated and stored
- Conversations and keywords searchable



Current State Challenges

Lack of Data Hampers Managers Ability to Lead

Workforce Management, Customer Experience Analytics

- Saves time to audit large volumes of calls with AI-assisted quality assurance
- Real-time feedback with specific pointers and goals on how to improve
- Can identify common concerns not adequately addressed by agents
- CSAT after call survey

# AI Milestones- Phase 1

## Patient Experience

AI Directed Call Paths
Call Back Feature
Info Messages in Queue
CSAT Survey

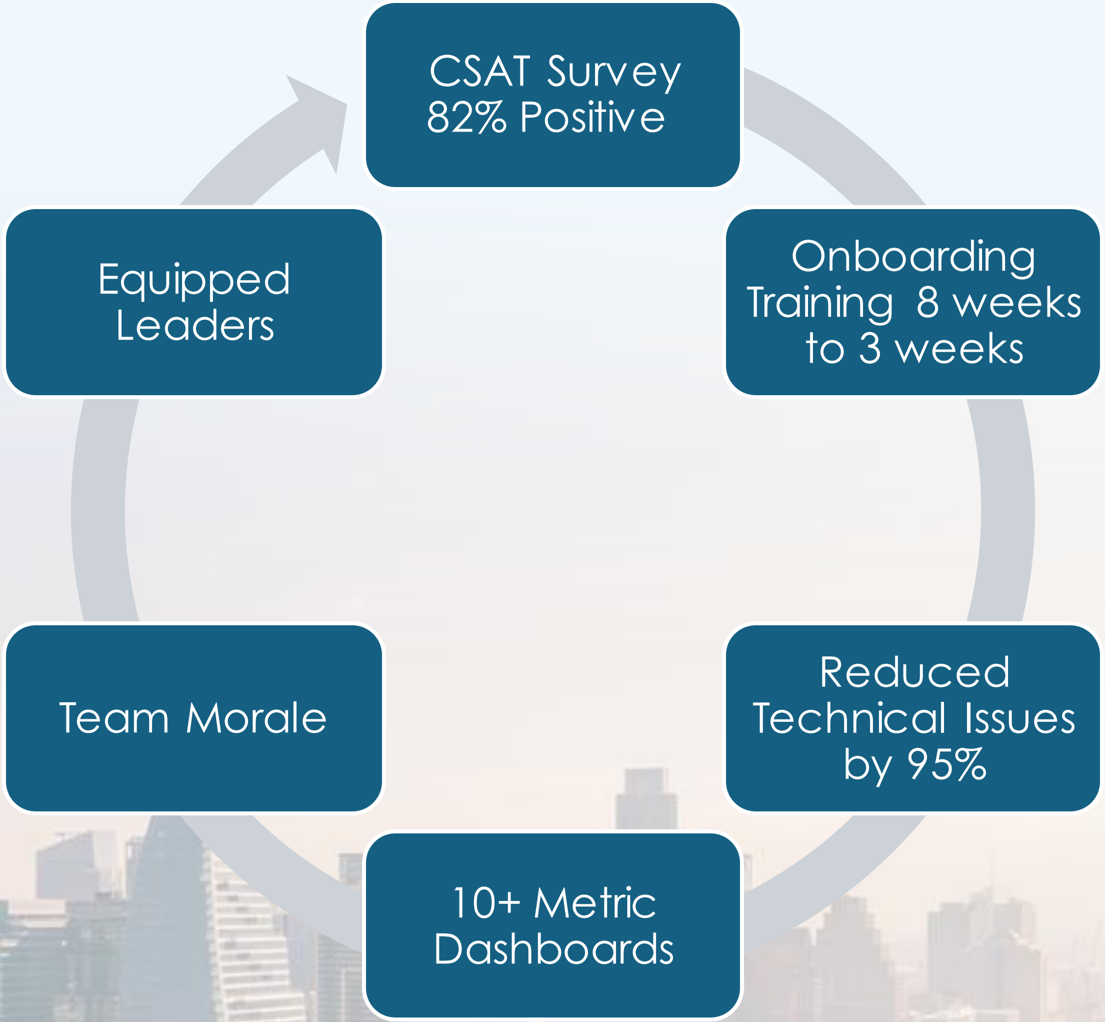
## Employee Experience

Improved Workspace [CCR + Leadership]
Workforce Management
10 + Metric Dashboards
Performance Incentives
Sentiment Scores + Transcription

## NHC Growth

Improved Wait Times
Improved Abandon Rate
Improved Quality of Service

# Call Center Wins



CSAT Survey 82% Positive

Onboarding Training 8 weeks to 3 weeks

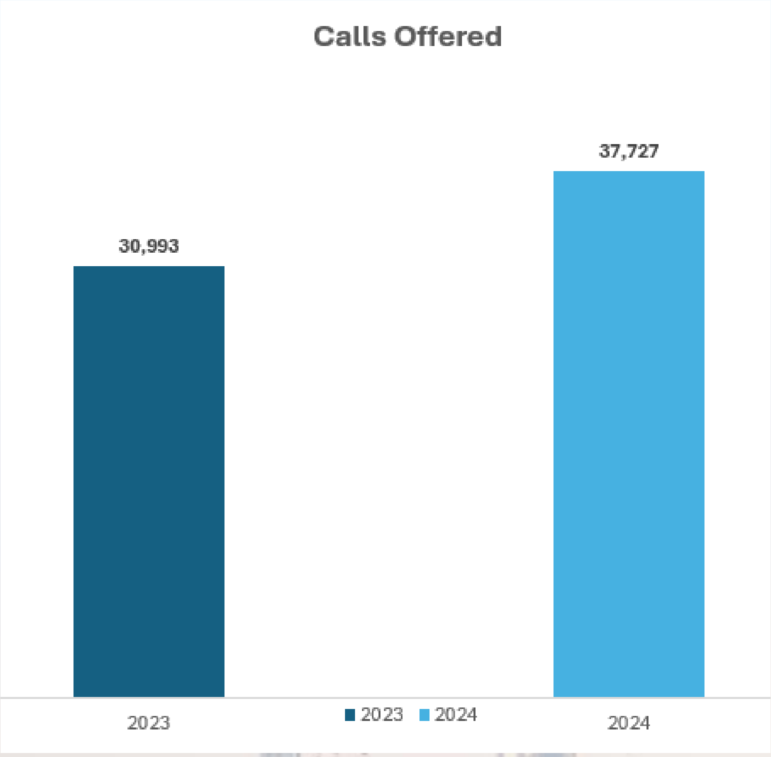
Reduced Technical Issues by 95%

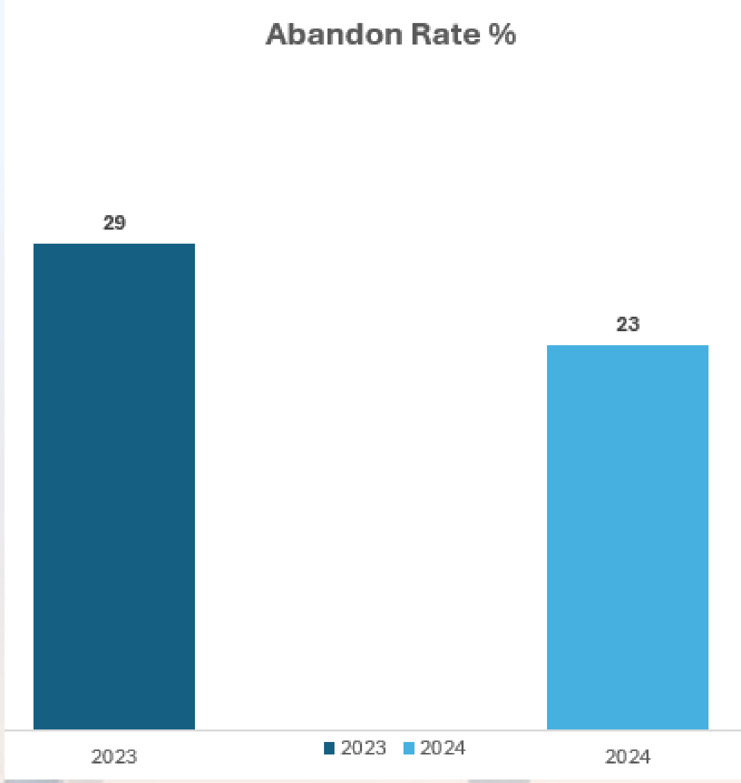
10+ Metric Dashboards

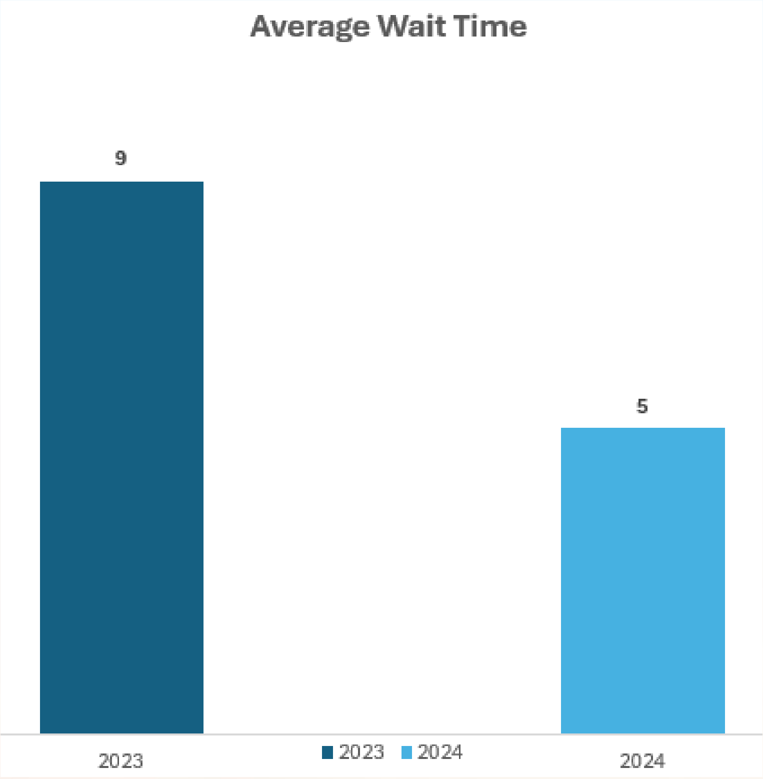
Team Morale

Equipped Leaders

# April YOY Comparison







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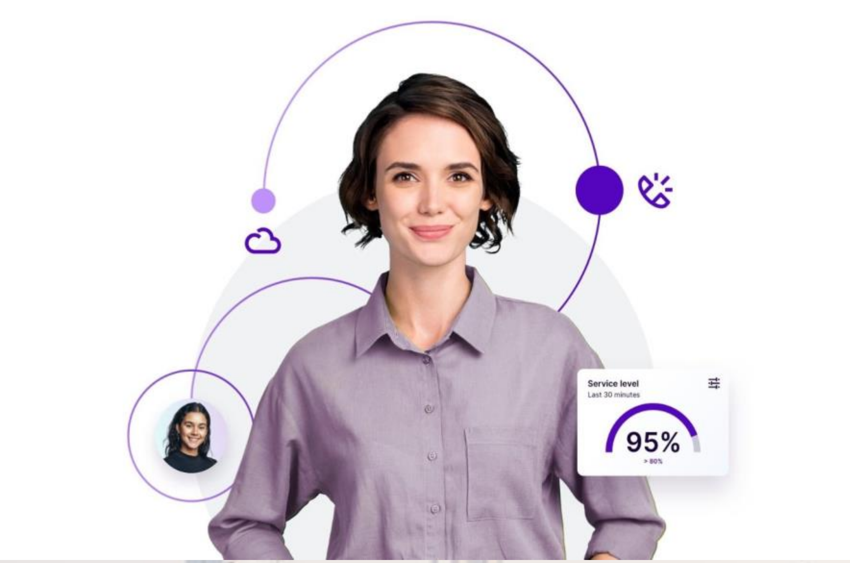
Benchmark Portal
The SOURCE for Contact Centers

# Empowering Agents



"I 110% love the Agent Assist feature! While I understand that building out the database may take some time, the ease of searching for answers and questions within it surpasses scrolling through the live updates document. Additionally, having access to transcripts, might not always be perfectly accurate, has been incredibly beneficial for referencing and cross-referencing notes. On occasion, it even captures patient dialogue that I may have missed.

Overall, the experience has been fantastic. I acknowledge the ongoing efforts behind the scenes to ensure smooth operations, but it's evident that people have become more comfortable using Talkdesk in their day-to-day tasks, which has facilitated overcoming initial challenges."

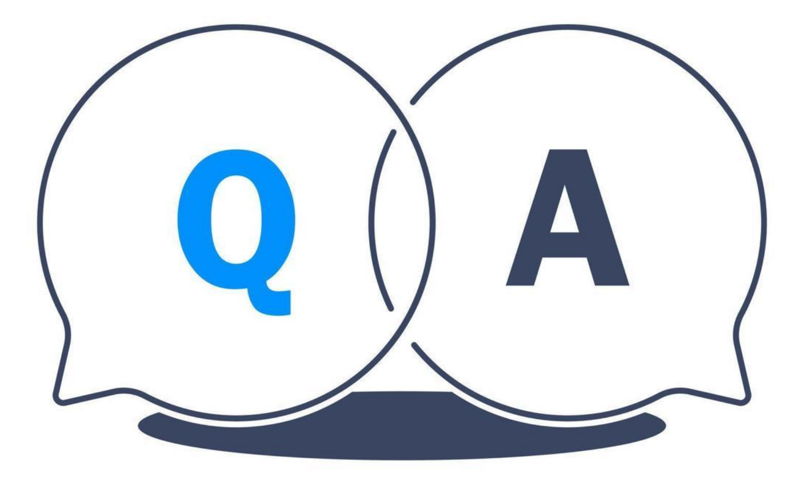
-Jesse H, CCR

# Key Takeaways and Insights

- Communication
- Purpose-Driven AI
- Understand the Challenges
- Drive Innovation

# Thank You!

better together



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