

METHODIST HEALTH SYSTEM CASE STUDY:

Transforming Collections &
Patient Experience with
Empathy and Analytics

October 23rd, 2025 Call Center Campus





Compassion

Empathy

Consistency



- Founded in 1928
- 7 hospitals across northern TX
- 75+ primary care & specialty clinics
- Focuses on transparency, sharing data and holding accountability

Take Care of Patients:

We treat our patients and their families as partners by communicating with them respectfully and meeting their needs in a timely manner.

Take Care of Each Other:

We cultivate an environment of inclusion, diversity, and collaboration through respecting each other, communicating professionally, celebrating successes, and providing feedback.



Take Care of Ourselves:

We invest in our personal well-being and our professional development in order to better contribute to Methodist's mission, vision, and values.

Take Care of Methodist:

We contribute to the continuous improvement of Methodist, striving to improve others' experiences and their impressions of Methodist.



Methodist named to **Newsweek's**
list of Greatest Workplaces →



#8



Methodist Health System

Leadership: Vision-driven • Empowering • Reliable

[See reviews](#) | [View jobs](#)

Methodist named to **Glassdoor's**
← list of Best-Led Companies

Methodist named to **Becker's Healthcare**
list of Top Places To Work In Healthcare →



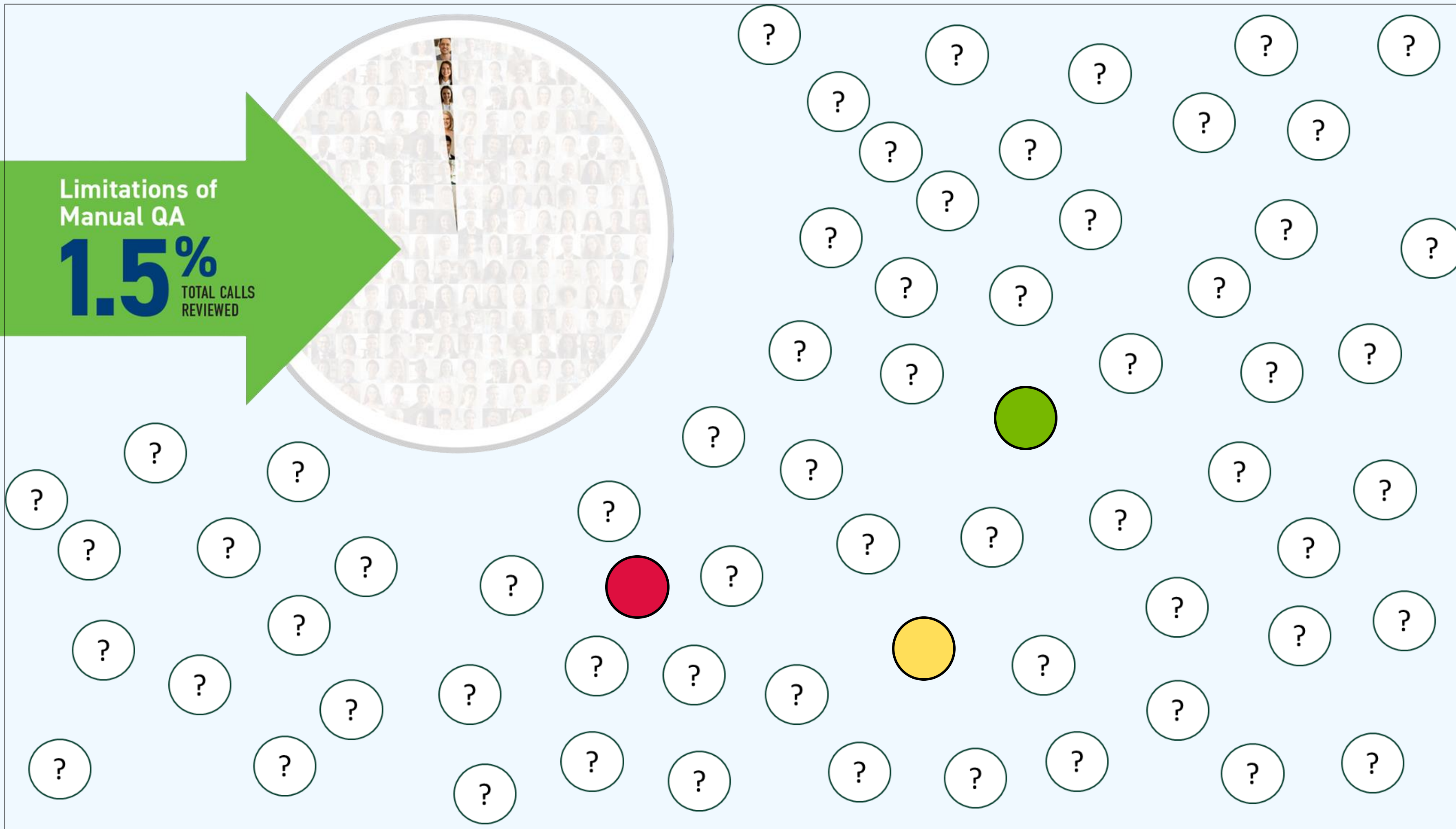
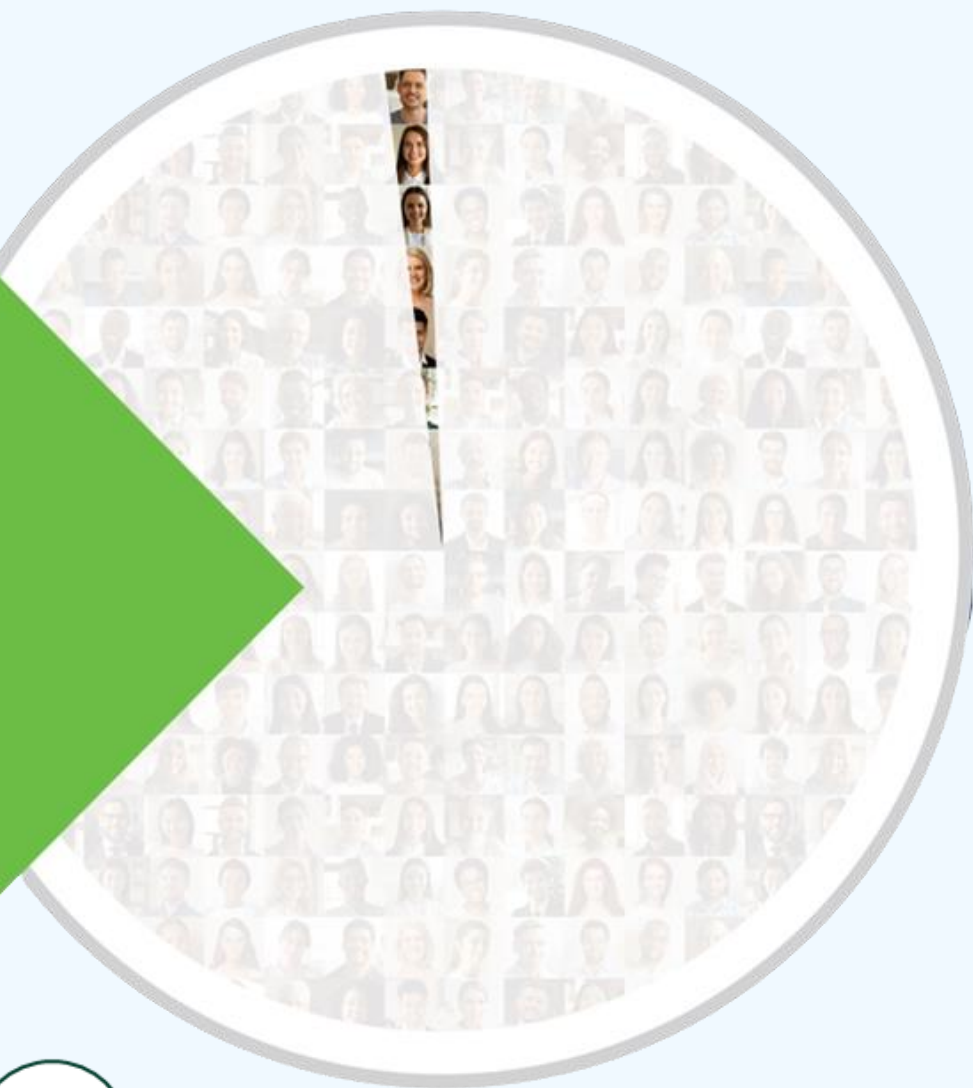
Challenges faced in collections...



Limitations of
Manual QA

1.5%

TOTAL CALLS
REVIEWED



Call Scorecard				
Agent:				
Date:				
Time:				
Reason for Call:				
1	Procedures	Yes	No	N/A
	Proper Greeting			
	Proper Closing			
	Proper Transfer			
	Proper Hold			
2	Verification			
	Date of Birth			
	Address			
	Date of Service			
3	Recording Disclaimer			
	This Call is Being Recorded			
	This Call is to Collect a Payment			
4	Account Explanation and Payment Request			
	Balance Past Due			
	Can You Pay Today			
	Can you Setup a Payment Plan			
5	Ownership / Accountability			
	Built Rapport			
	Listening Skills			
Total:				
Comments:				



Collections Department Manual QA Challenges:

- Minimal information
- No visibility into empathy
- Difficult to track consistency

1164 calls from September 22, 2025 to September 29, 2025

Score: 96%

Calls By Category	Category	Subcategory Results	Subcategory	Score
1164	Caller Name	1090	May I Please Speak with	94%
1164	Proper Greeting	1147	Proper Greeting OB	99%
1164	Caller Verification	1112	What is your Date of Birth	97%
		336	What is your Address	
		248	What is your Account Number	
		56	What is the last four of your Social Security	
1164	Recording Disclosure	1121	This call is Being Recorded	96%
1164	Calling Regarding	771	I'm calling Regarding your Account - Service Date	96%
		975	I'm calling Regarding your Account - Balance	
		798	I'm calling Regarding your Account - Account	
1164	Payment Ask	241	Ask for Payment - General	92%
		872	Ask for Payment - Today	
		398	Payment Plan	
		501	Customer Already Paid or Payment Authorization Heard	
1164	Proper Close	1104	Closing Statements	95%

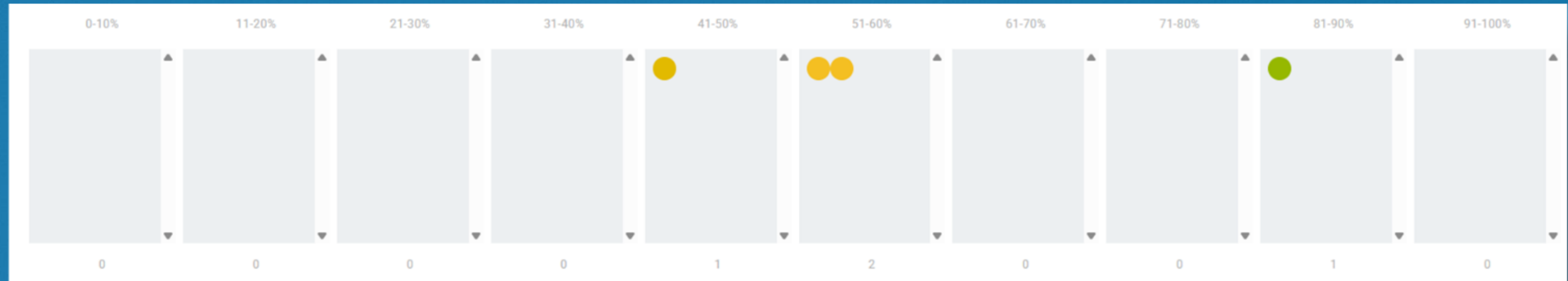
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Scorecards > z_Both Direction Scorecard - All Teams > All Dynamic Labels

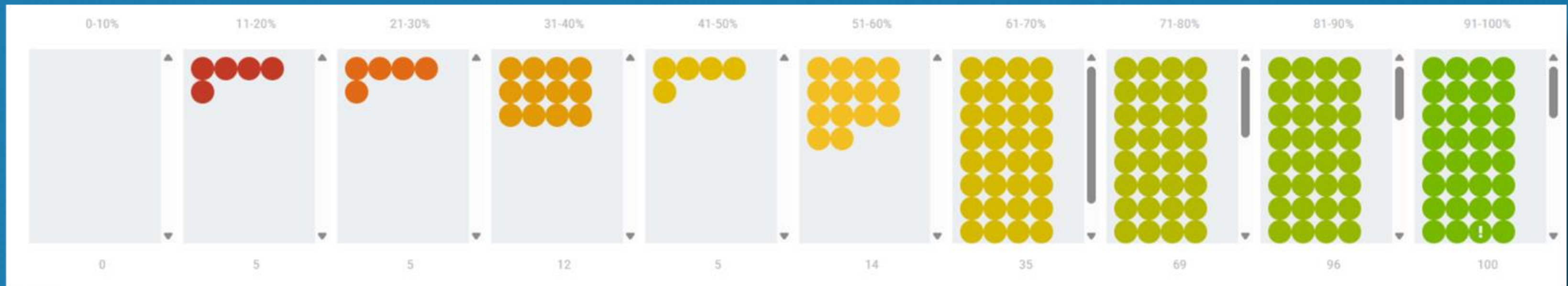
show filters

Agent	Talk Time	Calls/ Day	Total Calls	Score	Caller Name	Proper Greeting	Caller Verification	Recording Disclosure	Calling Regarding	Payment Ask	Proper Close	Overall Silence	Overall Overtalk	Positive Agent Sentiment...	Positive Agent Sentiment...	Positive Agent Emotion...	Positive Agent Emotion...
VIEW ALL AGENTS	5:37	11	147	97%	95%	98%	99%	97%	98%	89%	96%	30%	4%	<div></div>	<div></div>	<div></div>	<div></div>
Agents																	
Agent	Talk Time	Calls/ Day	Total Calls	Score	Caller Name	Proper Greeting	Caller Verification	Recording Disclosure	Calling Regarding	Payment Ask	Proper Close	Overall Silence	Overall Overtalk	Positive Agent Sentiment...	Positive Agent Sentiment...	Positive Agent Emotion...	Positive Agent Emotion...
<div></div>	5:36	20	20	96%	90%	100%	100%	100%	100%	85%	90%	28%	4%	<div></div>	<div></div>	<div></div>	<div></div>
<div></div>	6:44	16	16	93%	88%	94%	100%	94%	94%	75%	100%	18%	12%	<div></div>	<div></div>	<div></div>	<div></div>
<div></div>	7:19	10	10	100%	100%	100%	100%	100%	100%	100%	100%	48%	2%	<div></div>	<div></div>	<div></div>	<div></div>
<div></div>	4:19	7	7	100%	100%	100%	100%	100%	100%	100%	100%	21%	3%	<div></div>	<div></div>	<div></div>	<div></div>

FROM THIS...



TO THIS!



Success Metrics

Kept Percentage: 25% increase

**Self Pay: \$150,000 per
month increase**

**Average Handle Time:
2 Minute decrease**

Scorecard Scores up 20%



Mitch Taylor,
Director of Collections





Results That Break Through Silos

Methodist Health System: Scheduling

- Mutual contact highlighted the success that the Collections team had with the tool

Call Scorecard

Agent:		Date Called:				
Location:		Time:				
Patient Name:		Pt DOB				
Reason for call:						
		Rating				
1	Procedures	Yes	No	N/A		
	Followed Greeting Procedure					
	Followed Hold Procedure					
	Followed Transfer Procedure					
	Followed Closing Procedure					
2	Ownership/Accountability	Yes	No	N/A		
	Took Ownership/Accountability Of Issue					
	Created A Positive Experience for Patient					
	Built Rapport					
	Portrayed A Positive Company Image					
3	Listening Skills	Yes	No	N/A		
	Demonstrated Active Listening					
	Did Not Interrupt Patient					
	Exhibited Responsiveness Toward The Patient					
	Clarified Patient's Request/Issue					
4	Speaking Skills	Yes	No	N/A		
	Used Proper Grammar, Appropriate Terms & Expressions					
	Spoke Clearly & Audibly					
	Voice Tone Was Expressive, Enthusiastic & Alert					
	Spoke With A Proper Rate					
5	PROBLEM RESOLUTION, PROBLEM SOLVING	Yes	No	N/A		
	Used Effective & Tactful Questioning					
	Resolved Issue(s) &/or Provided Alternative Solutions					
	Made Decisive Judgments					
	De-escalation of angry patient					
	Did the patient schedule an appt?	Yes	No			
	Was the appt scheduled properly in NextGen?	Yes	No	N/A		
Observed overall patient experience (Score 1-5) 5 is excellent Circle One		1	2	3	4	5
Comments:						

6%
↑↑↑
Increase

40 calls from September 7, 2025 to September 14, 2025			20	2:47	82%
Agent Scorecard					
Calls By Category	Category	Subcategory Results	Subcategory	Score	
35	Greeting and Verification - IB	32	Greeting Procedure	74%	
		12	Phone Number		
		2	Address		
5	Greeting and Verification - OB	5	Greeting Procedure	100%	
14	Procedure - Hold	13	Can I Please Place you on Hold	82%	
		10	Thank you for Holding		
4	Procedure - New Patients	3	Drivers License ID	88%	
		4	Please Arrive 15 Minutes Early		
5	Procedure - Transfer (no weight)	5	Transfer Procedure	100%	
0	Procedure - Physicals (no weight)	0	Do not Eat or Drink After Midnight	N/A	
10	Did Patient Schedule an Appointment (no weight)	10	Did Patient Schedule an Appointment	100%	
0	Above and Beyond	0	Positive Customer Phrase Mentioned	N/A	
40	Closing	3	Anything Else we Can Assist you With	78%	
		36	Pleasant Closing Phrase		
	Overall Silence			27%	
40	Silence < 55%	37	Silence < 55%	93%	

Selected Date Range: 9/1/2025 - 9/8/2025

show filters

Insights > S_All Calls / All Dynamic Labels (search results for: manager OR supervisor)



manager OR supervisor

X

Use quotes to search for phrases, i.e. "Thank you for calling"

MORE SEARCH HELP

ADD CHANNEL SEARCH

Agent	Talk Time	Customer Sentiment	Customer Emotion	Silence	agent/cust	Overtalk	agent/cust	Speaking Time	agent/cust	Calls
VIEW ALL AGENTS	3:59	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	28%	(51/49)	3%	(48/46)	71%	(41/58)	130/6987

Agent Insights (of the zero available agents, 34 agents with insights were found)

Find Agents

Agent	Talk Time	Customer Sentiment	Customer Emotion	Silence	agent/cust	Overtalk	agent/cust	Speaking Time	agent/cust	Calls ↓
	3:11	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	34%	(53/47)	1%	(49/39)	65%	(36/59)	21/305
	5:13	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	28%	(49/51)	3%	(46/45)	71%	(41/58)	12/306
	5:17	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	23%	(37/63)	6%	(46/54)	77%	(48/56)	10/249

TASK

Assigned By

on Oct 10, 2025 9:04 AM

For:

Call ID: 136943231

Task Details

VIEW

EDIT

Select a Coaching Definition

Customer Satisfaction

Task Type

Call Review

Due Date (optional)

Fri, Oct 17th 2025

Task Message:

Type your task message, here

No attachments

Callfinder

Coaching Summary - All Users

2

CSI

Coaching Summary

Filters:

Any Coaching Definition

Any Task Type

Start Date Created

Mon, Sep 1st 2025

End Date Created

Fri, Oct 10th 2025

CLEAR FILTERS

APPLY & RELOAD

Search by User or Agent (3 letters minimum)

EXPAND ALL

COLLAPSE ALL

Name ↑	Scorecard	Total	New	In-Progress	Closed	Disputed	Overdue	Unread	Adjusted	Guidance Sessions	Last Guidance Session
> All Users		147	0	0	147	0	0	0	721	0	—
Name	Scorecard	Total ↓	New	In-Progress	Closed	Disputed	Overdue	Unread	Adjusted	Guidance Sessions	Last Guidance Session
>		71	0	0	71	0	0	0	266	0	—
>		41	0	0	41	0	0	0	263	0	—
>		23	0	0	23	0	0	0	145	0	—
>		12	0	0	12	0	0	0	47	0	—



Questions for Maureen?



**Thank
You**

