



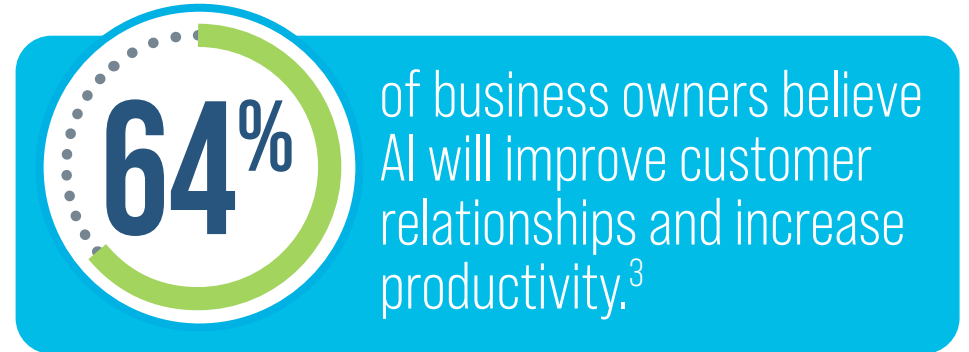
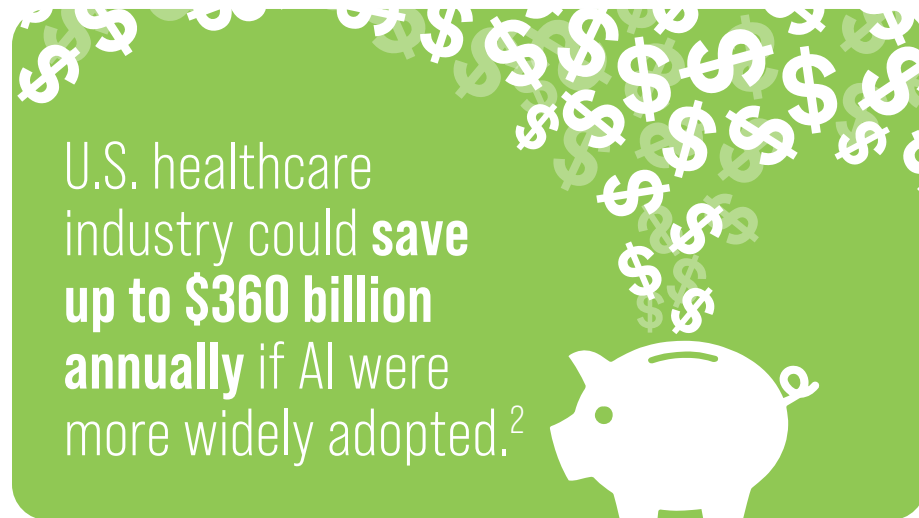
## Taking Patient Relationships to New Heights with AI Technology



While Artificial Intelligence (AI) is an evolving trend throughout various industries, humans have been dreaming about it for centuries. Whether it is Homer's "Golden Maidens" that helped Hephaestus in the *Iliad*<sup>1</sup> or Rosie, the beloved housekeeper on "The Jetsons," non-living beings that assist humans in accomplishing tasks have appeared countless times throughout history.

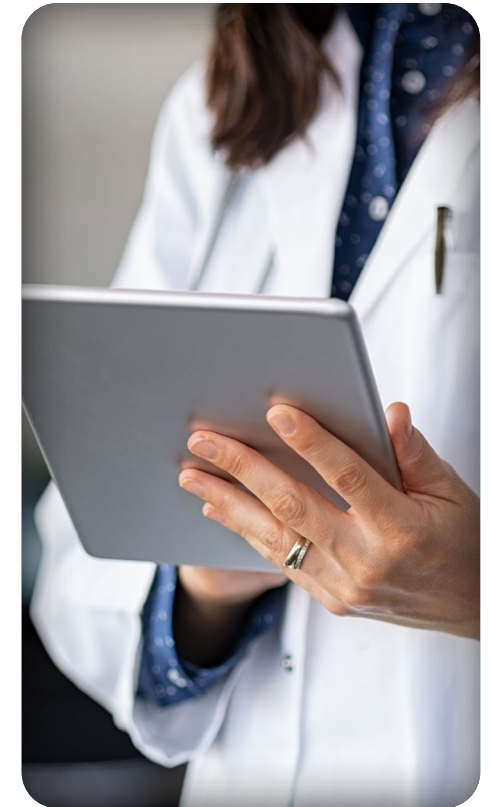
Of course, those examples are just literary works that someone dreamed up. In recent years, however, the introduction of AI-powered technology has taken these dreams and turned them into reality. The 2022 introduction of ChatGPT finally provided various industries with a usable tool that could support and enable customers at various stages of their consumer journeys.

Yet in the healthcare industry, AI adoption has been cautious at best. According to researchers at McKinsey and Harvard, the U.S. healthcare industry could save up to \$360 billion annually if AI were more widely adopted, but uptake has been limited due to a lack of trust and misaligned incentives.<sup>2</sup>



On the other hand, AI is thriving in other industries, where business owners recognize that AI can have a positive impact on their bottom line. In fact, Forbes Advisor found that 64% of business owners believe AI will improve customer relationships and increase productivity, with more than half of these owners using AI for chatbots, emails, and personalized services.<sup>3</sup>

That is exactly where the healthcare industry can take a cue from their consumer industry counterparts in the adoption of AI – managing relationships. In this eBook, we explore the use case for AI in patient relationship management, detailing how AI improves patient satisfaction, reduces the burden on an already overworked staff, and delivers better health outcomes through enhanced patient education.



## What is Patient Relationship Management

In order to understand how AI enhances patient relationship management (PRM), we first need to define what PRM is and how it differs from traditional patient engagement.

In short, PRM is an approach in healthcare that emphasizes building and maintaining long-term, meaningful relationships with patients. Unlike episodic patient engagement, PRM emphasizes continuous, data-driven interaction, enhancing patient experiences and outcomes while offering significant operational and financial benefits to healthcare systems.

The transition towards PRM is essential as we navigate the shift to value-based care in the face of escalating healthcare costs. That is why TeleVox PRM platforms address all stages of the patient journey and help support patient-centered care goals for better outcomes and experiences.



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## Using Conversational AI to Provide a Persistent, Actionable, and Conversational Patient Experience



To support its PRM platforms, TeleVox introduced Iris in 2023, an AI-driven omnichannel virtual assistant. Unlike other AI solutions, Iris empowers patients to self-serve key tasks such as scheduling appointments, refilling prescriptions, and accessing vital information (including insurance coverage details) seamlessly across SMART SMS, voice, or web interfaces.

At the heart of Iris's capabilities is a conversational AI engine that intelligently sources and updates its knowledge base from a health system's existing content and documents, and interfaces with the EMR. The corpus of information powering Iris' knowledge base is exclusively provider-curated and approved content (e.g., website, documents, etc.) and information coming directly from the EHR. If patients ask questions outside the context of these sources of truth, Iris simply states that it doesn't know the response rather than 'hallucinating' and contriving a false response. This is an example of responsible AI as it guarantees that Iris provides high-fidelity and up-to-date information, ensuring provider and patient-centric accuracy.

When patients utilize Iris to answer their questions and manage their requests, it is offloading work from staff and leads to increased efficiency and cost-savings for health systems. Patients benefit from having instant, 24/7 access to information without having to contact call centers, annoying bouts of phone tag, or needing to wait for an office to open. With Iris, patients are able to satisfy the self-service experience they have become accustomed to from industries outside of healthcare.

Moreover, Iris is built with privacy and security at its core. This innovative solution not only enhances patient autonomy and satisfaction but also streamlines operations for healthcare providers, ensuring a superior and secure patient service experience.

### How Iris Reinforces Patient Relationship Management

Iris is not simply a technological advancement. Rather, it was purpose-built to strengthen the relationship between providers and patients, leading to better outcomes for patients and healthier bottom lines for practices. In the following sections, we'll examine some common interactions and detail how conversational AI platforms like Iris can offer a helping hand to patients while delivering improved patient experiences and outcomes, enhanced ROI, and streamlined staff efficiencies for health systems and physician practices.

#### Four Ways AI Contributes to PRM:

- 1 24/7 self service capabilities.
- 2 Easy access to information via knowledge base.
- 3 Providing the human touch when needed via Agent Chat escalation.
- 4 Improved staff availability and reduced burnout.





## 24/7 Self Service Capabilities



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71% of patients cite access as a top factor in selecting a new provider, and that certainly carries over to sticking with the provider in the future as well. In fact, patients say they “value things like appointment availability, convenience, customer service, and the ability to connect to their provider through their preferred channels.”<sup>4</sup>

Now, consider the frustration when they call a new provider and get sent to voicemail, or when they cannot schedule or reschedule an appointment via text message, or when they have no access to prescription refills and important health resources outside of business hours. That frustration manifests itself in 78% of patients saying they dropped a provider over difficult experiences.<sup>4</sup>

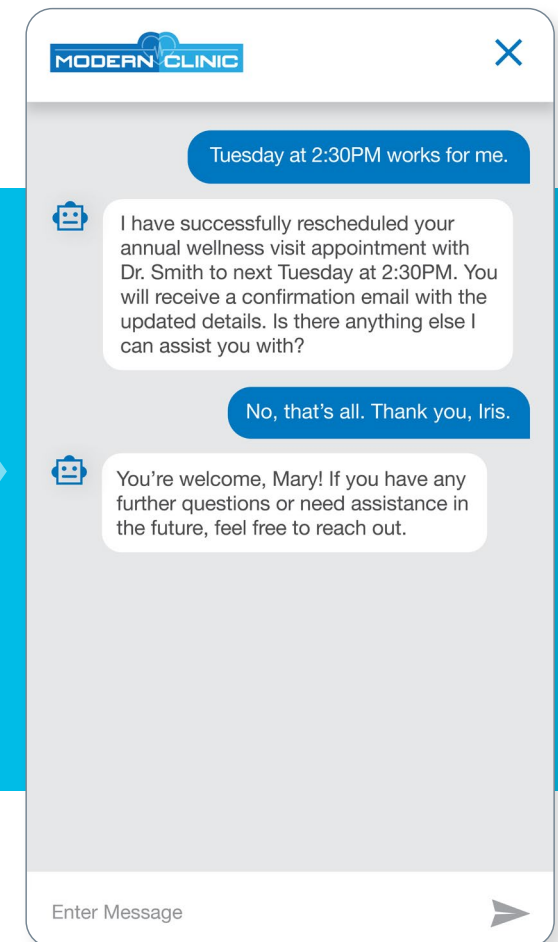
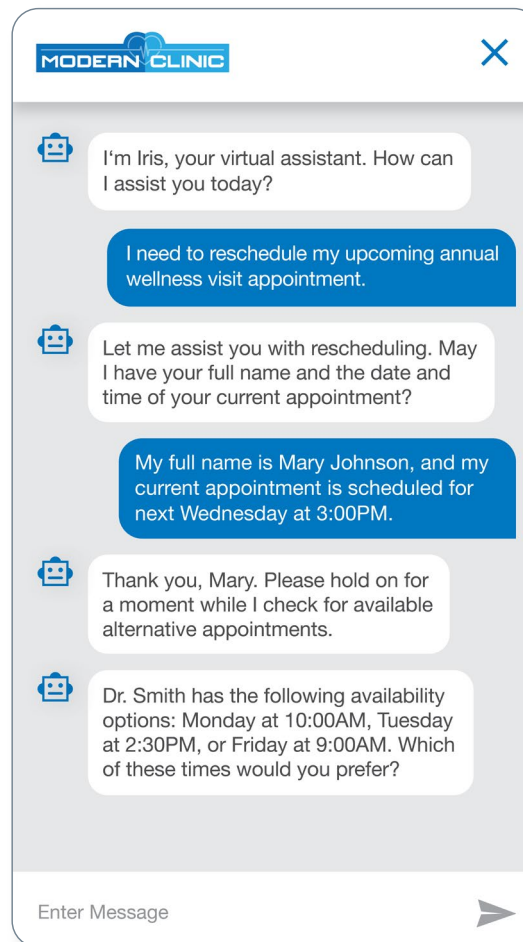
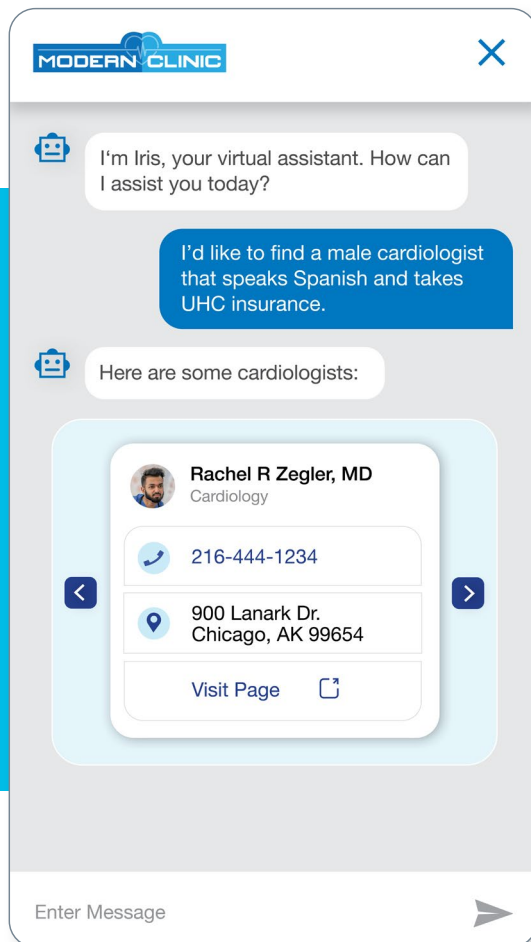
The problem here is that traditional healthcare messaging is transactional. It consists of nothing more than basic notifications with fixed responses based on pre-set limitations and rules. There is no “wiggle room” for interactions outside of the standard operating procedures. Not only does this lead to poor patient experiences, but it also imposes additional costs on the provider for staff to handle these calls. In fact, studies have shown that making an appointment by phone takes an average of 8.1 minutes to complete – with staff transferring patient calls 63% of the time.<sup>5</sup> While they are waiting, the patient may decide that this isn’t worth their time, canceling the appointment altogether and looking for another provider.

On the other hand, with generative AI virtual assistants like Iris, the patient can instead quickly and easily find available providers and schedule or reschedule an appointment 24 hours a day, seven days a week, regardless of whether they call, text, or visit the provider’s website. Iris has SMART SMS, SMART voice, and SMART web interfaces, offering an omnichannel experience that meets the patient in the channel where they are most comfortable.



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Iris ensures the physician is making a great first impression simply by being available 24/7 – without hiring additional staff to work the phones after hours. The patient gets what they want quickly and efficiently through the AI-powered virtual assistant, eliminating common frustrations. Iris then continues to deliver a patient-friendly approach from this moment forward with advanced tools like prescription refills and easy bill pay. This helps the health provider further strengthen the patient relationship throughout their journey, leading to much better retention and referrals down the road.



## Easy Access to Information via Knowledge Base

Patients often have many questions when it comes to their healthcare. These questions can range from what services a physician offers to inquiries as simple as where to park or where to find food in a hospital. They also want these questions answered efficiently. We've already established that frustrating experiences will lead to patients looking for a new provider, and calling the office to have a simple question answered doesn't enhance the patient relationship and certainly isn't the best use of your staff's time.

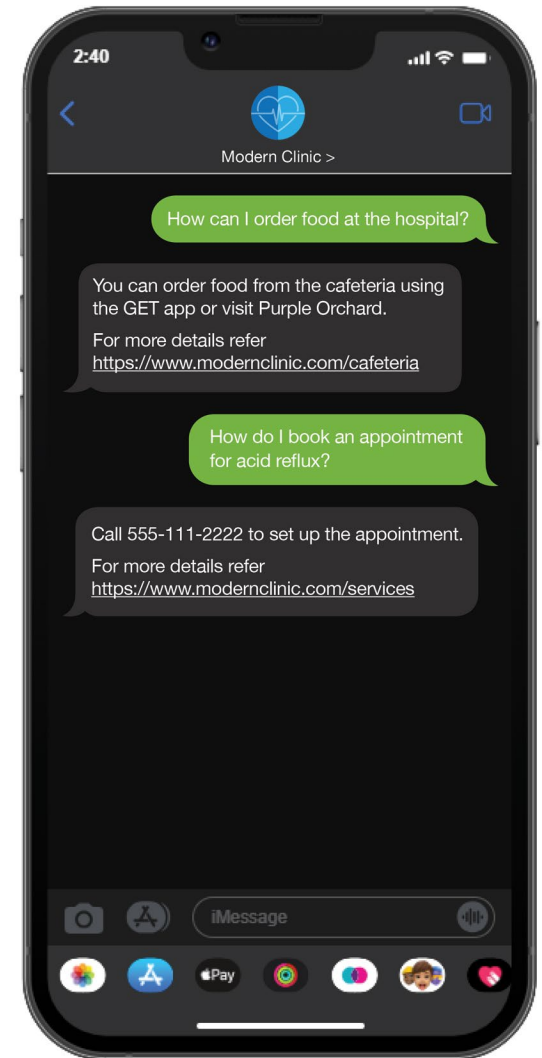


As an example, consider that more than 85% of patients ask for directions when they go to a hospital or other public health facility, and 30% of first-time visitors get lost. Even worse, medical staff members spend as much as 40 hours each year directing patients where to go.<sup>6</sup> With shrinking workforces in healthcare, this reliance on highly trained staff to provide answers to simple questions isn't sustainable, and we've already established that calling the office doesn't offer a quick or fulfilling experience.

However, with a virtual assistant like Iris, patients can tap into an AI-powered knowledge base to answer important questions and get immediate answers. Iris differs from other generative AI chatbots like ChatGPT because Iris will only pull information from approved sources, such as a provider's website. Iris can provide trustworthy, accurate answers based on existing content, and there is no integration needed with setup typically occurring in a day or less.

There is no limit to the questions Iris can answer if it finds source material that is approved. Iris can answer questions about where to park, how to find food in a hospital, searching for providers who specialize in certain categories, procedure preparation, how to pay a bill, and so much more. Not only does this offer a smart and persistent conversation channel for patients, but for each question Iris answers, that is one less call to the office, and more time for your staff to interact with patients in the building, further strengthening your patient relationship management.

In the scenario where a question gets asked that Iris cannot find an answer in approved materials, it can connect the patient with a staff member who can assist. This feature helps the patient avoid endlessly searching for material that may not exist, while also only notifying staff when additional assistance is needed.



## Providing the Human Touch When Needed Via Agent Chat Escalation

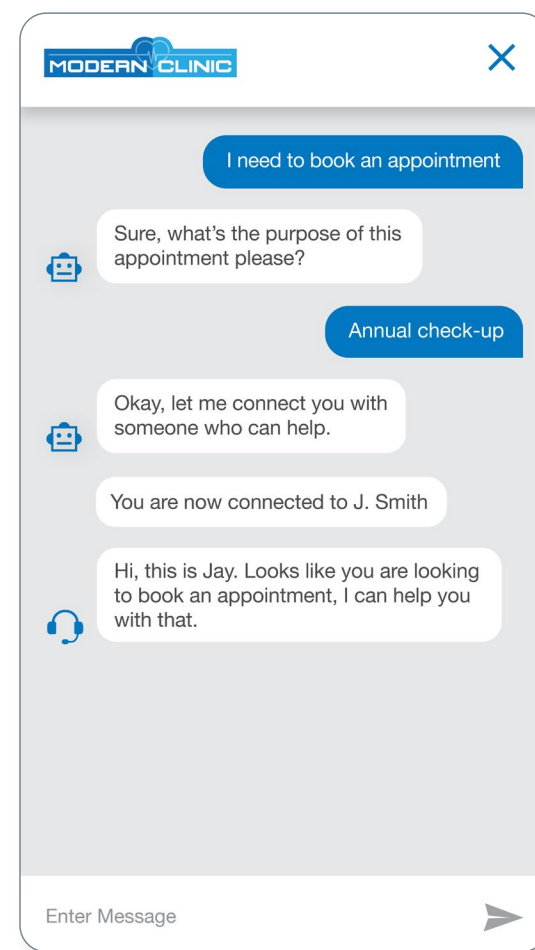
Sometimes, patients still need the human touch to help them continue their journey. Thankfully, Iris can seamlessly hand a patient off to a real person, automatically escalating the patient inquiry to a live agent who can help complete the task.

Whether they are searching for information that may not exist on a provider's website or have a complicated need that requires support from a live agent (e.g. referrals), the patient is assured that they will receive the help they desire when the virtual assistant escalates the conversation to agent chat. Not only does this lead to a better experience overall for the patient with this hybrid approach, but the provider will also experience greater return in the form of higher NPS scores and patient satisfaction.

Everyday interactions that were completed solely in digital channels resulted in a Net Promoter Score® of 53 compared to just 39 when done through a contact center,<sup>7</sup> showcasing that customers prefer digital access for common tasks. However, for episodes where the customer needed advice, the highest scores overall in a study by Bain & Company were with those who started in a digital channel and ended with a human channel.<sup>8</sup>

This blended approach has proven successful, especially when moving beyond everyday tasks. Consider a recent NPS Prism study conducted in the financial industry. Everyday interactions that were completed solely in digital channels resulted in a Net Promoter Score® of 53 compared to just 39 when done through a contact center,<sup>7</sup> showcasing that customers prefer digital access for common tasks. However, for episodes where the customer needed advice, the highest scores overall in a study by Bain & Company were with those who started in a digital channel and ended with a human channel.<sup>8</sup>

This really gets to the core of what patient relationship management is about. Every patient is different, and their journeys are unique, so providers must be prepared to meet them in their preferred channels with persistent, actionable, and conversational interactions. Iris offers customizable workflows that know when the virtual assistant can easily resolve the situation, or when elevation to agent chat is essential to provide the human touch when needed.





## Improved Staff Availability and Reduced Burnout

While the previous examples emphasized patient satisfaction through self-service and meeting them in their preferred channel, we must address that patient relationship management is certainly a two-way street. Medical staff members play a vital role in enhancing the relationship between providers and patients and are a key factor in retention, reputation, and referrals.

However, healthcare workers are feeling both overburdened and burned out. 84% of nurses<sup>9</sup> and 62% of physicians<sup>10</sup> report feeling burned out in numbers that are steadily increasing post-Covid. Meanwhile, lower-wage staff (those who would answer the phone) are expected to see a 3.2 million worker shortage in the next five years.<sup>11</sup>

And it's easy to see why. Consider a health system that handles 1 million appointments per year. If just 3% of appointments need to be rescheduled, that is 30,000 phone calls to the office. We established that each phone call takes 8.1 minutes, so now we are looking at 243,000 minutes of staff time on the phone. That is 4,050 hours, or the equivalent of 506.25 working days (eight hours per day) spent on the phone. In other words, this health system needs at least two full-time staff members just to reschedule appointments, and that has not even considered phone calls dealing with procedure prep, new patients, and other common inquiries.

When you enter Iris into the equation, there is an immediate impact on staffing and morale, which certainly trickles down to the patient experience as well. Even if only half the patients reschedule through the AI-powered virtual assistant, that frees a minimum of one staff member to focus on more important tasks, including one-on-one time with patients in a clinical care setting that further strengthens patient relationships. Iris also helps patients quickly and easily pay their bills, manage their appointments, answers FAQ, and more, without the need for staff intervention. In this instance, we see how Iris can deliver a self-service experience for patients that will allow healthcare workers to spend their time on other tasks that will further benefit their patients.

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# Achieving Financial Success through Patient Success

With each of the use cases identified above and the obvious need for patient-enabling self-service capabilities, patient experiences stand to be greatly improved with Iris. And with improved patient experiences come a better return on investment for health providers. As we all know, higher patient experience scores often lead to better reimbursement rates and better overall earnings. However, improved patient experiences can also lead to better online reviews, more referrals, and better patient retention. All three of these areas are paramount to a health provider's bottom line, and any solution that could improve these areas must be explored.

## Better Experiences Equal:

- Better online reviews.
- More referrals.
- Improved patient retention.



## Iris: The Secret Weapon for Boosting Patient Relationships

As patients continue to demand an experience closer to what they've become accustomed to in the consumer world, the healthcare industry is falling behind. Taking a cue from the business world, integrating generative AI is a great first step in managing patient relationships in the healthcare industry. AI-powered solutions like Iris can help health systems and private practices improve patient experiences and outcomes throughout the entire healthcare journey, leading to stronger, longer-lasting patient relationships.

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