The patient experience (PX) revolution in healthcare

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Foreword

Much has changed in the patient experience (PX) in the last year. Most notably, the COVID-19 pandemic has brought digital channels to the forefront in how patients experience healthcare. But these digital channels are one piece of a multifaceted healthcare delivery model that still leaves patients navigating a complex system.

Traditional patient care workflows, systems, and patient communications are often disconnected, leading to a confusing and frustrating patient journey. Influenced by experiences in other industries, patients expect an easy digital front door experience where they can receive the care, transparency, and health guidance they need from the providers they trust.

Faced with this reality, the question remains: how can providers connect the pieces? Healthcare organizations that can unify their digital patient and in-person experiences to support empathic care will earn and keep their patients' trust. Patient trust in turn equates to patient retention, care follow-up, and greater lifetime value.

It takes many parts working seamlessly together to make this happen. As shown in our global research study, a modern cloud contact center has the potential to support the unified patient experience sought after by both providers and patients alike. Serving as a critical engagement layer integrated across core systems to deliver care and personalized support, contact centers can and should work harder and smarter for healthcare organizations—much like connective tissue in the human body.

As part of this Talkdesk Research™ report, we examine how providers and patients perceive patient experience today, the role contact centers are currently playing in delivering the right patient experience, and how contact centers can be repositioned to elevate the patient experience in ways that impact outcomes, retention, and revenue.

We hope these insights and ideas inspire new dialogue and discussion in your organization.

Sincerely,

ANTONIO GONZALEZ
Industry Insights Manager
Talkdesk

About this report: methodology

163
PX professionals

685
Healthcare patients

8
Healthcare leaders

Our quantitative online survey research was conducted in October 2020 among qualified healthcare PX professionals and patient target audiences across 11 different global markets including: US and Canada (North America); Australia, India, New Zealand, and Singapore (Asia-Pacific); France, Germany, Italy, Spain, and the UK (Europe).

- A total of 163 global interviews were collected among PX professionals employed by healthcare providers with more than 200 full-time employees.

- PX professionals include leadership and management for patient service, patient experience, PX operations, and contact center agents.

- For additional context, executive interviews with 8 healthcare leaders were conducted in November 2020.

- A total of 685 interviews were collected among healthcare patients aged 18-65 that have interacted with a healthcare provider in the past three months. Results are representative of the online populations aged 18-65 living within each of the surveyed regions.

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Executive summary

Digital behaviors are changing the way healthcare providers and payers are expected to deliver patient experience (PX). The COVID-19 pandemic has sped up the adoption of virtual care while heightening digital expectations among healthcare consumers. Yet not all healthcare organizations are fully equipped to provide a unified, modern experience across the end-to-end patient journey, leading patients to choose to go elsewhere for care —or even deferring it altogether.

As providers reimagine the patient experience as a seamless, digital-front-door experience that combines digital and in-person interactions, they are re-examining the role the contact center can play to facilitate this—as a patient engagement layer across multiple systems.

In this global study of healthcare providers and consumers, five main themes emerged.

1. Providers aspire to reimagine the patient experience

With 75% of patients reporting they are more loyal to providers that invest in improving patient experience, 87% of healthcare CX professionals agree they need to differentiate based on it. The will to improve PX is strong and investments are being made.

2. A fragmented patient journey is costing providers

Many systems and workflows in healthcare are currently siloed, including contact centers. Accordingly, 63% of patients say their provider is not capable of providing an excellent experience in a completely digital way. The stakes to address this are high; 67% of patients report that a single poor patient service experience will negatively impact their brand loyalty.

3. Modern contact centers are integral to driving unified and seamless PX

Providers are reconsidering how customer service influences PX, and turning to modern cloud contact centers to leverage capabilities that go beyond issue resolution. 69% of PX professionals report that positioning the contact center as a strategic asset is a high priority, but 57% say on-premises systems limit their ability to improve PX.

4. Contact centers' new role is care coordination

The opportunity to elevate the purpose of the contact center from issue resolution to care coordination can supercharge PX transformation. Providers are looking beyond what their contact center does now to imagine how it can facilitate inbound and outbound interactions that proactively serve patient needs, such as providing next-best-action recommendations. Currently, only 28% of providers use AI to fuel recommended actions, but 46% anticipate doing so within two years.

5. Contact centers can excel at patient and business intelligence

The pressure is on to extract more data from the contact center to inform strategic business and PX decisions. 73% of PX professionals cite deeper patient insights for the organization as a high priority, and 81% are seeing increased demand for patient feedback from the contact center compared to last year. Modern cloud contact centers can offer a rich, accessible repository of HIPAA-compliant data.

I. Providers aspire to reimagine the patient experience

Patient expectations are high for PX

Digital consumerism has changed patient expectations of the healthcare journey. With technology supporting nearly every aspect of their lives, patients (and providers) expect healthcare organizations to fully utilize technology to support the patient experience. This includes how patients engage with customer service in the organization—from getting help with a billing inquiry, to scheduling an appointment, to following up with questions.

Traditionally, contact centers in healthcare serve to address these issues; yet many healthcare systems utilize multiple contact centers or patient portals that are not always seamlessly interlinked. Patients can be left with gaps in understanding how to navigate the system, and the risk of receiving conflicting information heightens.

What is patient experience?

PX is the experience felt from every interaction a healthcare consumer has with a healthcare organization, at every touchpoint, across the patient journey. Patients tend to judge the entire healthcare system based on each single, unique experience in the journey and make decisions based on how their experience feels. Organizations must get every touchpoint right and unified to deliver a great patient experience.

Like in any industry, patients want and expect interactions with the healthcare organization to feel as if they are engaging with one unified brand.

They are seeking fast, accurate support on their preferred channels —which may vary depending on circumstance—highlighting the importance of omnichannel service.

Additionally, more than half of healthcare consumers expect providers to offer digital capabilities and they choose providers based on those capabilities[1].

Patients have high standards for interaction:

84% say it is important that their customer service issues are solved quickly and accurately

78% say it is important to be able to engage with healthcare systems on their preferred channel

58% say their customer service expectations are higher than one year ago

74% say their preferred channel varies depending on the context

> "Healthcare is progressive, yet so far behind. We've been taking video and virtual visits for some time, but COVID made it a necessity. Institutions have progressed their digital capabilities in the past six months that would have otherwise taken two to three years."
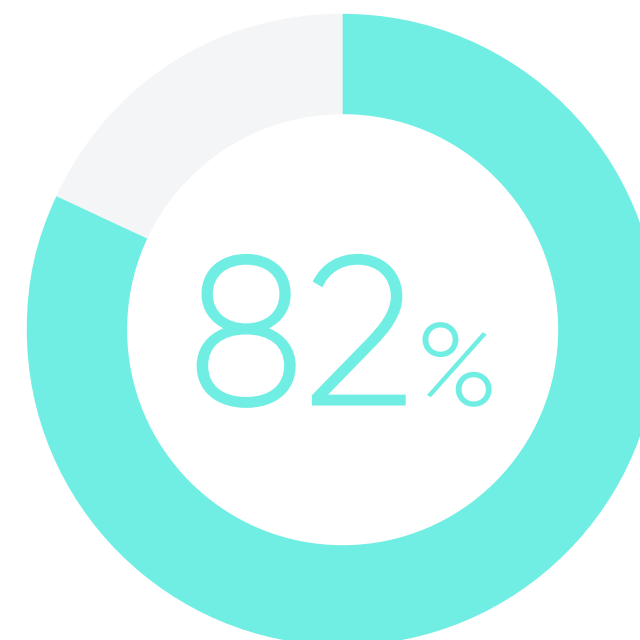>
> — VP, PATIENT EXPERIENCE, MAJOR US HEALTHCARE SYSTEM

Providers understand PX can differentiate

Providers are aware that patient expectations are rising, and with more options for healthcare than ever—from traditional facilities to virtual start-ups—providers must set themselves apart.

Leading providers are reimagining patient experience through the lens of digital transformation: highly personalized, seamless, and proactive interactions, knowing it can be a differentiator.

Among PX professionals...

87% view delivering strong PX as a key differentiator
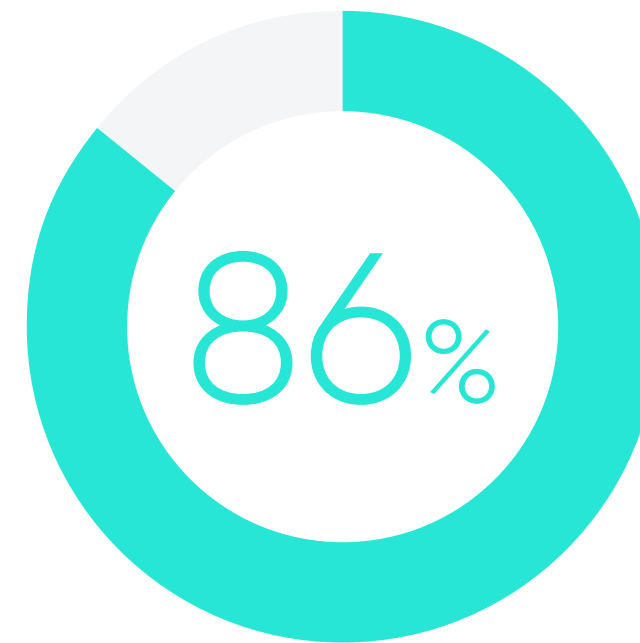
86% rate PX as a high priority today, with **+8% projected growth in importance over the next two years**

82% report an expected budget increase for PX initiatives over the next year

Inspiring patient trust is key to driving loyalty and revenue. Like every industry, healthcare is held to the "Amazon" standard for ease of use, fast service, minimal hassle, and a supportive experience.

When providers do it right, there is a clear payoff:
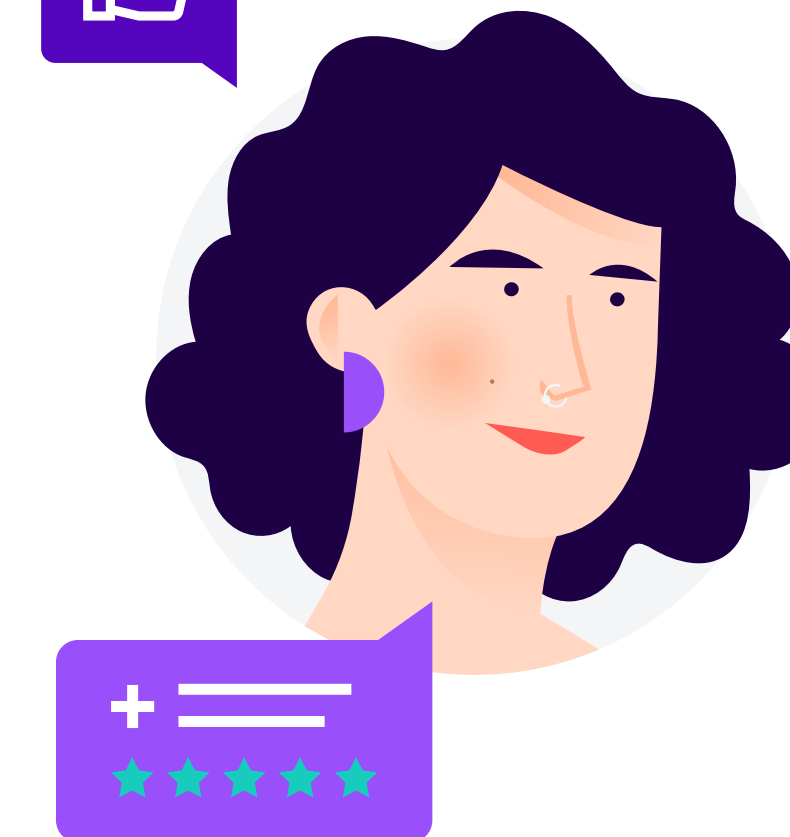
75% of patients are more loyal to healthcare providers that invest in strengthening their PX

However, meeting these expectations has proven challenging.

II. A fragmented journey is costing providers

Adding digital capabilities is progress, but not the end game alone

Patient portals have been implemented by many healthcare organizations to help reduce patient effort, coordinate information, and provide online patient engagement options. While progress is being made on the digital front, there's still patient cynicism around digital prowess, and an uphill battle for providers in delivering against expectations for better PX. IT stacks are often siloed and disconnected among providers, many times including service channels and contact centers. The net result can be an increased patient dissatisfaction, and a decreased likelihood to partner with their provider in the future.

"[Silos] are a challenge quite honestly. We equate it to an obstacle course that we put our patients through. When they arrive for an appointment they don't know if they have to pay, or if they have to fill out paperwork for every little registration... [and in some instances] when they go to the next clinic in our system they have to do the exact same thing... We're working to find ways to make this more seamless because this doesn't form the relationship with the patient that we want."
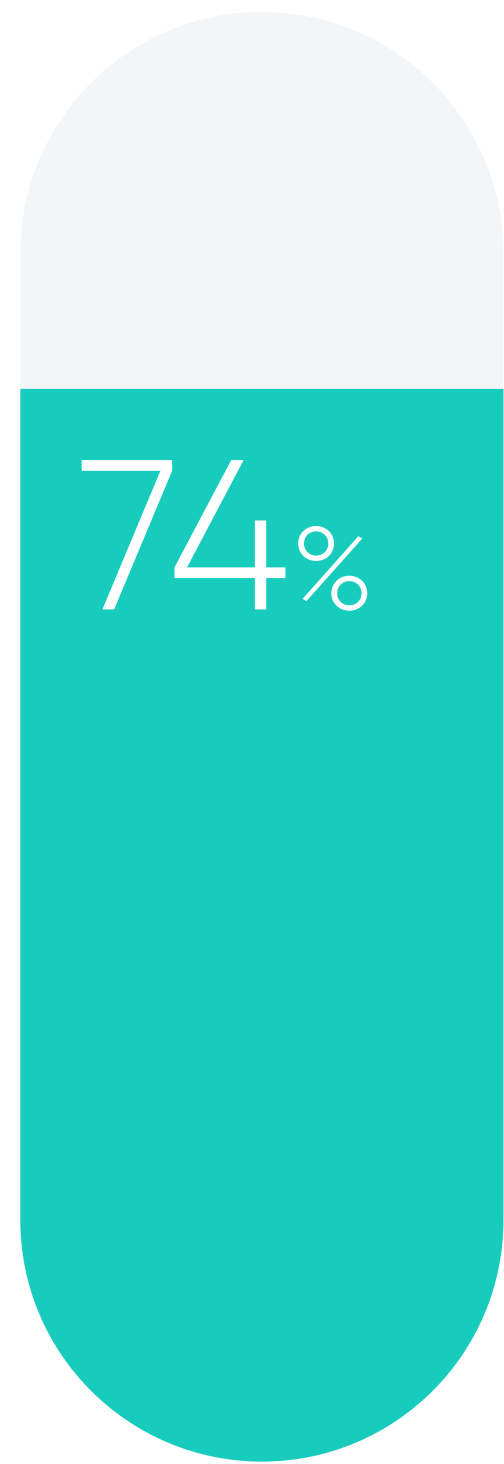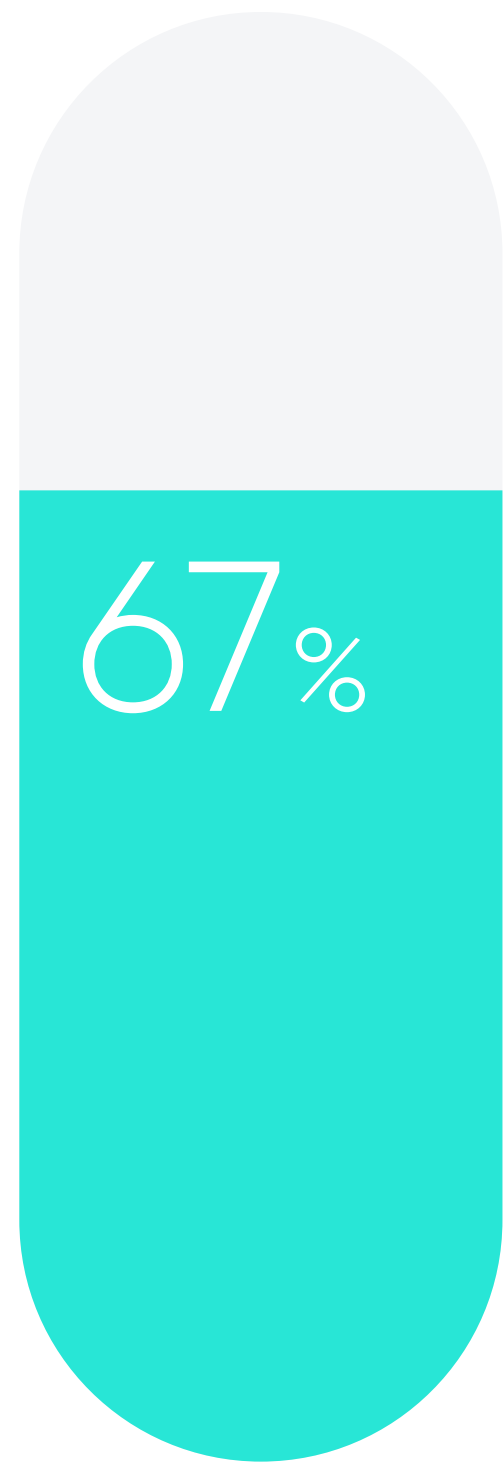
— CMO, MAJOR US HEALTHCARE SYSTEM

60%
of providers do not consider themselves omnichannel

58%
of PX professionals report having multiple contact centers supporting different groups in the business

74%

of patients report having to provide the same information to multiple healthcare professionals and **60% report repeatedly taking the same tests[2]**

67%

of patients indicate that a single poor customer service experience with a provider will negatively impact their brand loyalty

63%
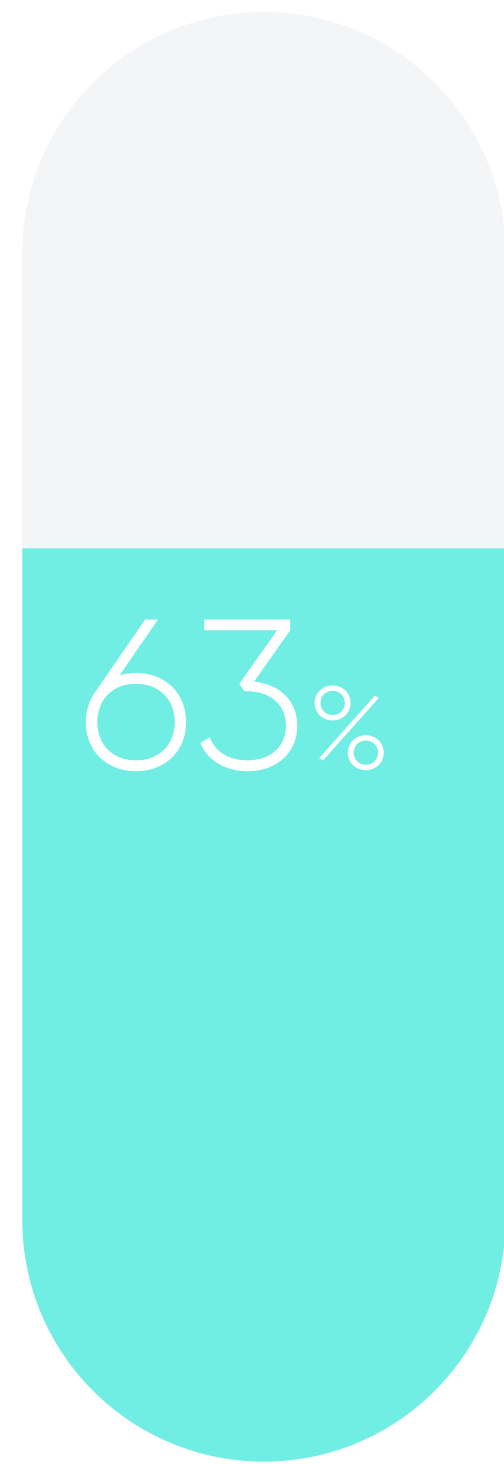
of patients do not believe their provider can deliver an excellent experience in a completely digital way

Disconnected systems may also result in poorer patient outcomes due to conflicting messaging and unclear paths for fulfilling care recommendations.

According to a study by the University of Colorado[3], patient handoffs can be some of the most dangerous moments in treatment. With providers increasingly responsible for proactively supporting patient health outcomes, a poor handoff may impact retention and revenue in the long run.

There's appetite among providers for a proactive, unified care approach characterized by seamless orchestration of digital and in-person interactions across channels. What's needed is the engagement layer that can facilitate these seamless and proactive interactions.
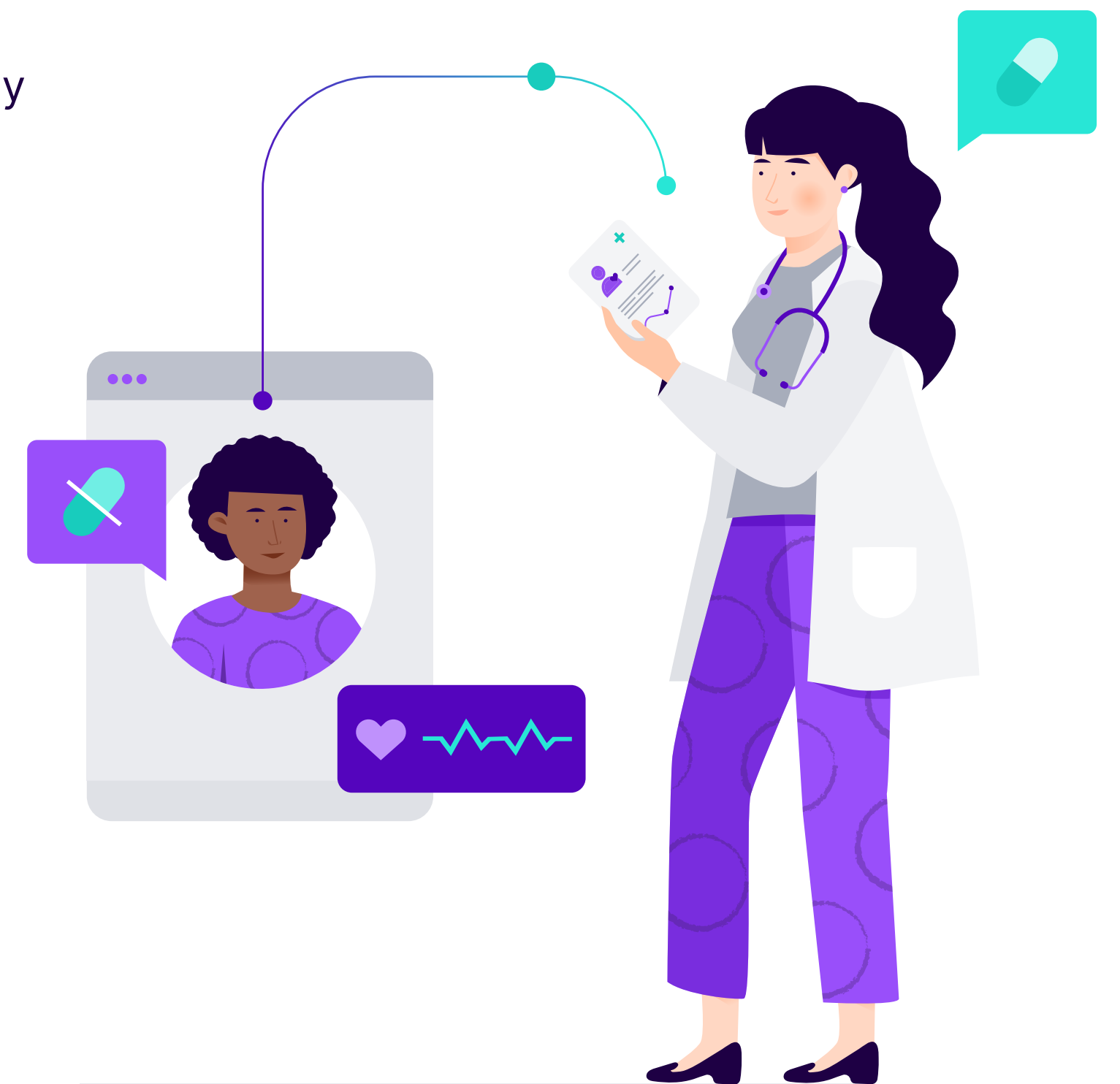
[2] "A journey towards smart health", Deloitte

[3] "Patient Handoffs Are Still Dangerous", MedPage Today

III. Unifying PX with contact centers

Contact centers can do more

Recognizing contact centers' role as a key part of PX, healthcare leaders are now exploring ways in which they can support better patient outcomes.

The potential contact centers have is reflected in the views of PX professionals:
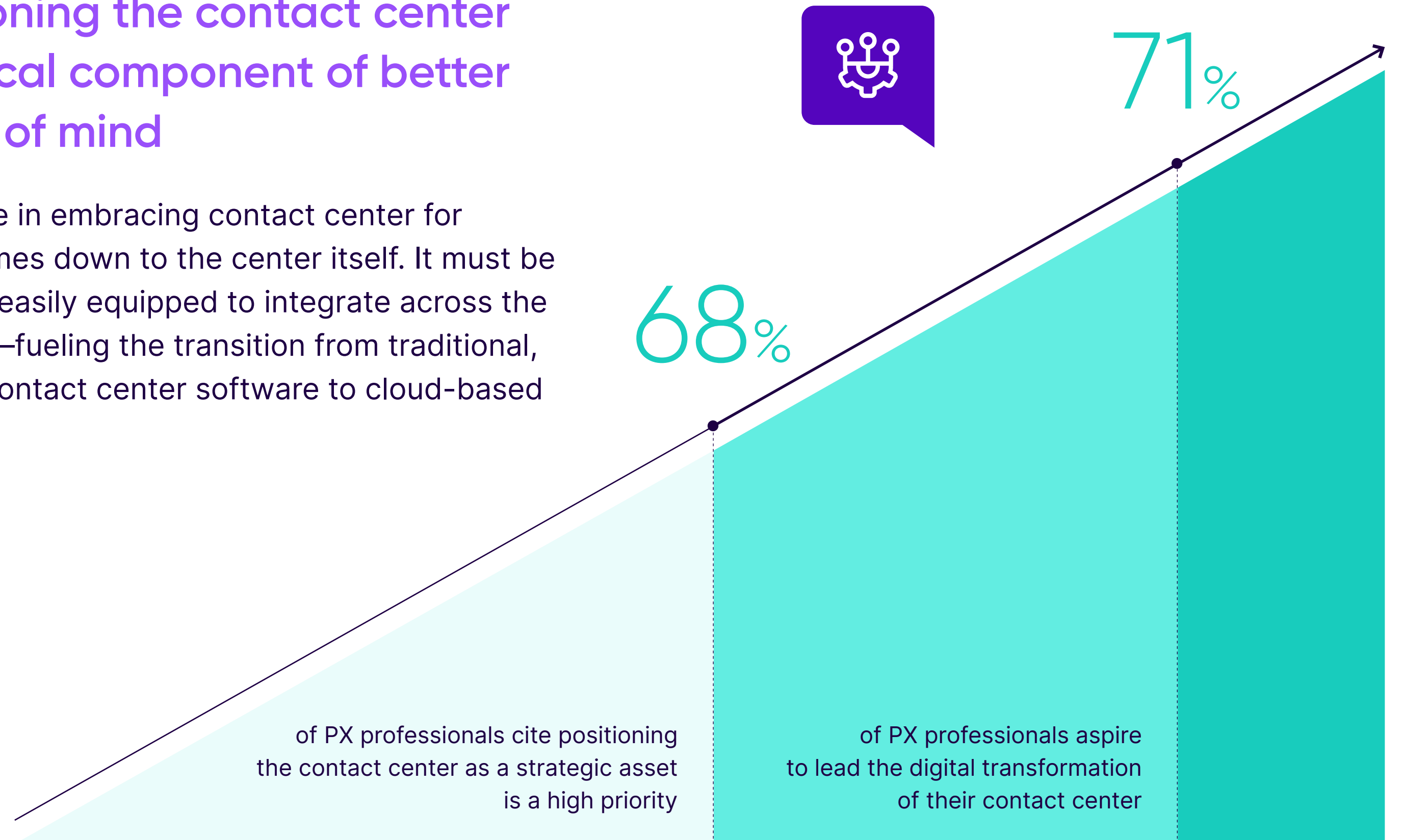
81% say that contact centers have an influence on PX today, with **+11% projected growth in agreement over the next two years**

88% agree that contact centers are a meaningful contributor to their PX strategy

Repositioning the contact center as a critical component of better PX is top of mind

The challenge in embracing contact center for better PX comes down to the center itself. It must be modern, and easily equipped to integrate across the organization—fueling the transition from traditional, on-premise contact center software to cloud-based solutions.

68% of PX professionals cite positioning the contact center as a strategic asset is a high priority

71% of PX professionals aspire to lead the digital transformation of their contact center

12

Legacy systems hinder PX

Unsurprisingly, perhaps, legacy contact center set-ups can make improving PX difficult—highlighting a desire to transition to cloud-based solutions.

Type of contact center technology used by healthcare providers

28% On-premises only

21% Cloud-only

43% Mix of cloud and on-premises

76% of those using on-premises or hybrid solutions report being likely to transition to a fully-cloud based system within 2 years
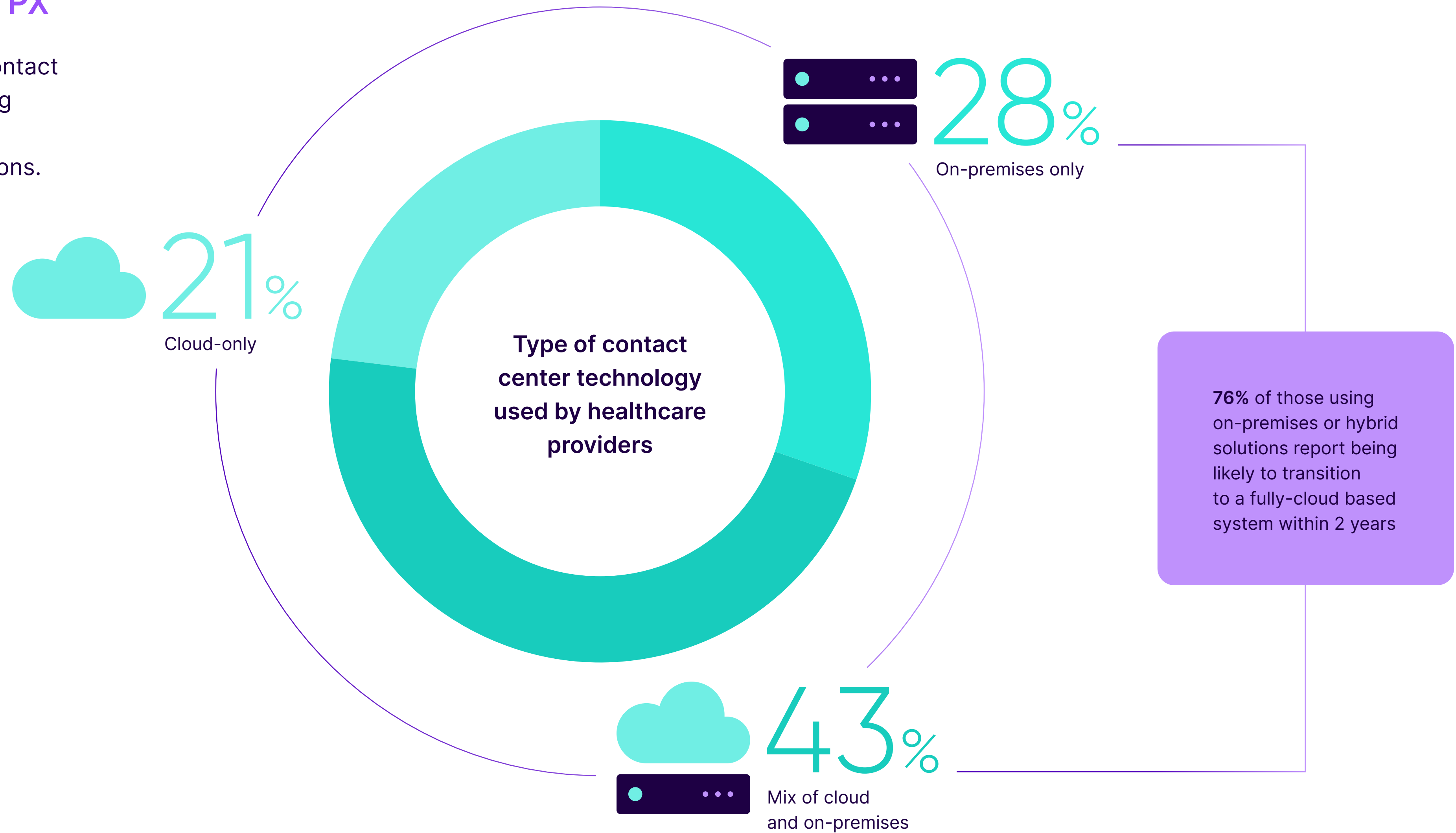
On-premises

✖ Tied to physical servers

✖ Hard to integrate with other systems

✖ Requires manual updates

✖ High maintenance costs

✖ Agents must work onsite

✖ Siloed from other systems

Cloud
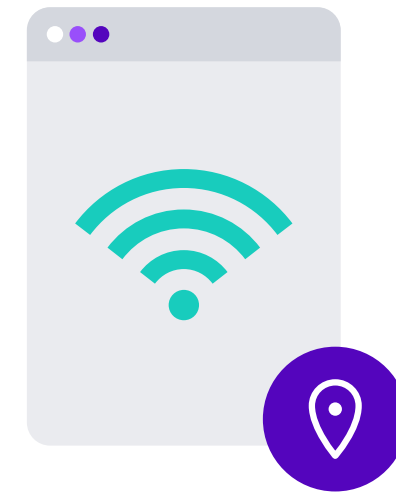
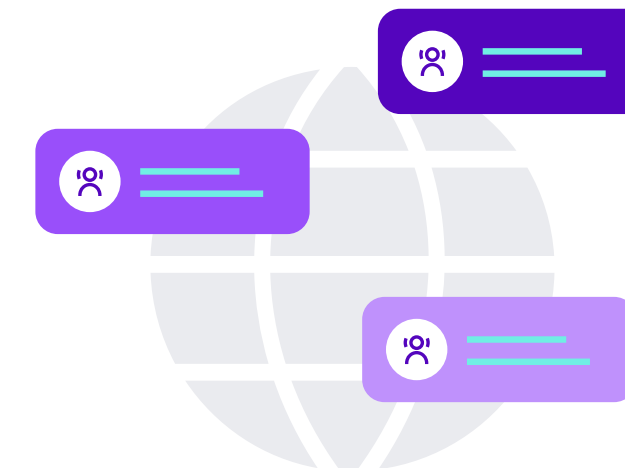Accessible anywhere with internet
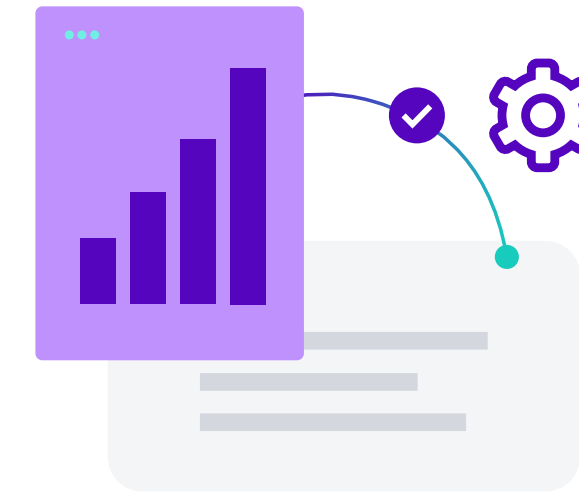
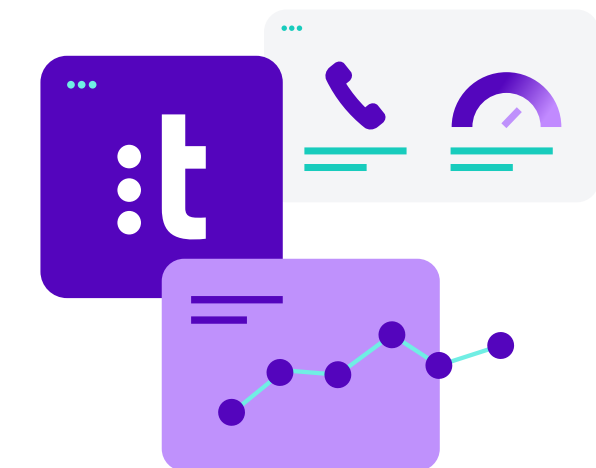Easily integrates with other systems
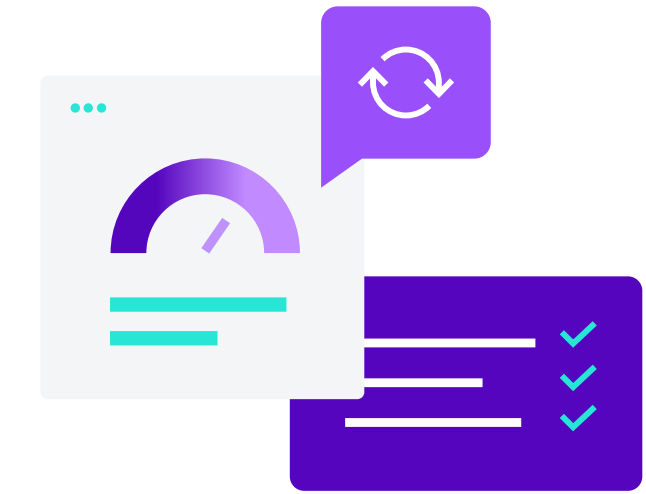
Updates automatically

Minimal to zero maintenance costs

Agents can work from anywhere

Connects to all core systems

Upgrading the contact center is growing in urgency, with **68%** of PX professionals reporting that doing so is a high priority, and **75%** reporting that they intend to enhance the security and compliance of their technology.

PX professionals report the following upgrades as **important to supporting the rest of the business:**
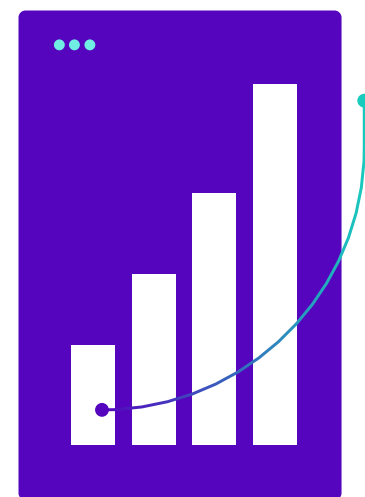
83%
better technology and tools to support supervisors and managers as important
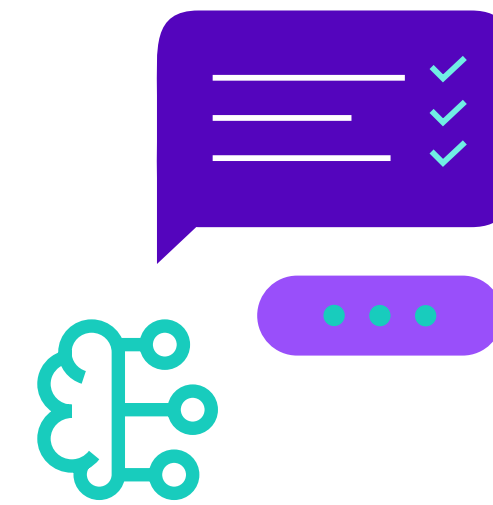
66%
more automation/ artificial intelligence

80%
business intelligence/ data and analytics to share with the broader company

As healthcare providers prioritize and move their contact centers to the cloud, the opportunities for additive support for PX increase.

IV. Contact centers' new role is care coordination

From issue resolution to care coordination

A modern cloud contact center will continue to serve traditional customer service needs, but stands upon a bigger opportunity: supporting PX transformation to facilitate effective coordination of healthcare workflows. The contact center can serve as an engagement layer to facilitate inbound and outbound interactions to proactively serve patient needs.

"I want to get to where I can take all of the patient information to get to a personalized care plan, that pairs up patient habits and how they like to engage, like text, email, or wearables, and then build out the way to deliver this personalized content to them to support home care initiatives."
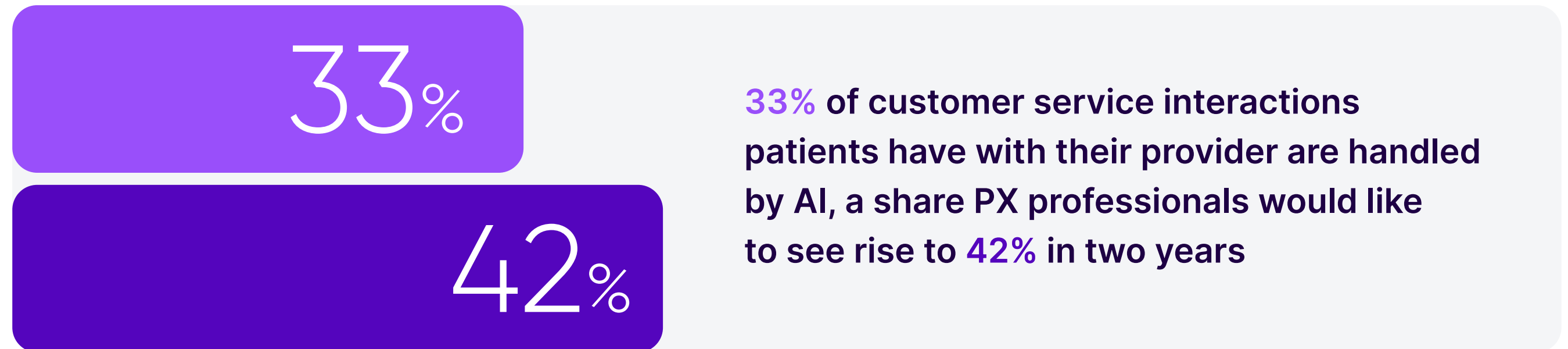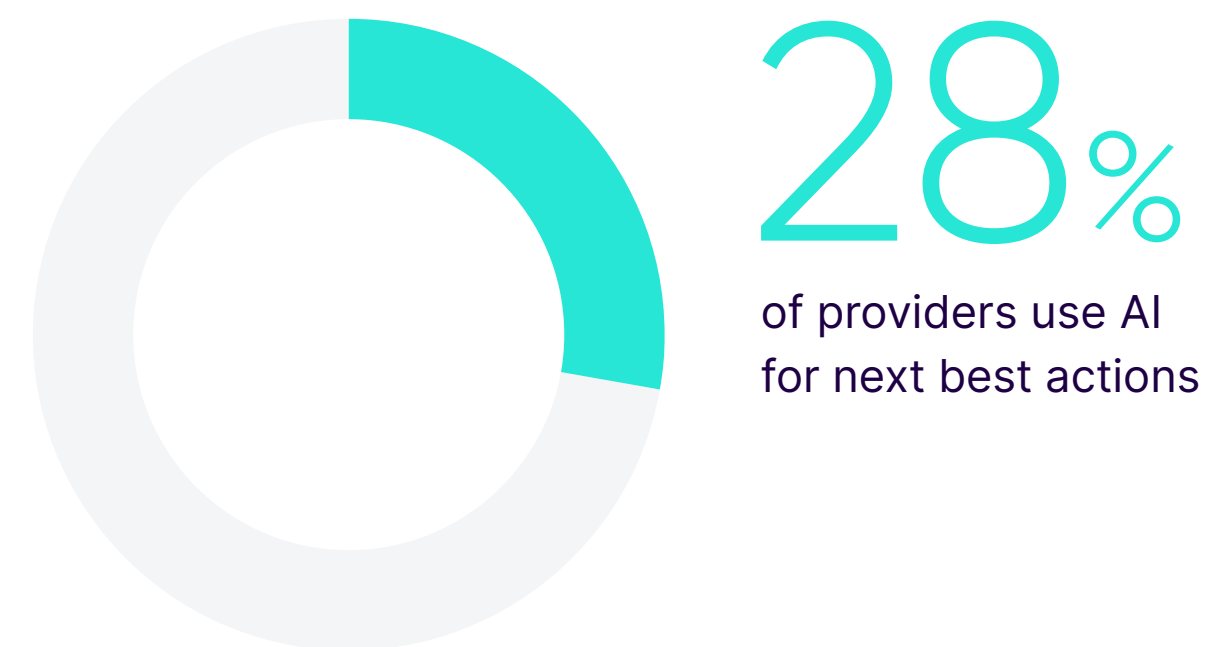
— VP, PATIENT EXPERIENCE, MAJOR US HEALTHCARE SYSTEM
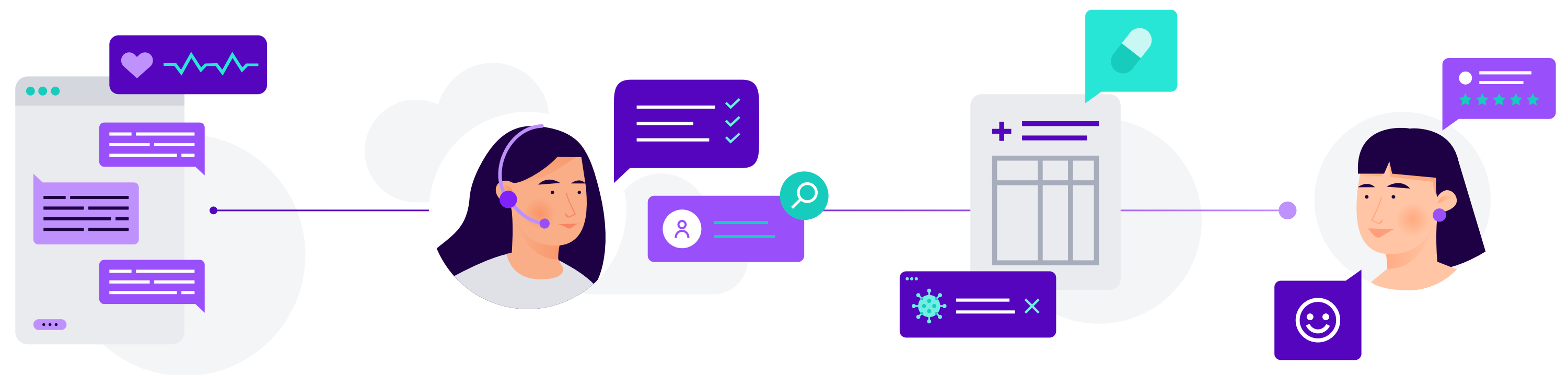
AI plays a role

Cloud contact centers built with AI and machine learning capabilities are able to learn from past engagements, and facilitate interactions that are relevant to patient needs.

For example, AI can serve as a care coordinator, keeping track of a patient's diagnosis, results, treatment, prescriptions and provide proactive next best action recommendations to patients via the channel of their choice. This is already in play at more than one-fourth of providers.

33%

42%

33% of customer service interactions patients have with their provider are handled by AI, a share PX professionals would like to see rise to **42%** in two years

28%

of providers use AI for next best actions

46%

anticipate using AI within two years

While AI may seem in its early days yet, modern cloud contact centers are implementing it in real and practical ways that create results.

Communication is key

Clear communication that engages the patient is needed to facilitate better outcomes. Our study found that providers are adding more communication channels to connect with patients, and believe the contact center needs deeper integration with unified communications in order to be successful in supporting the rest of the business.

PX professionals want better communication

74%
believe the contact center needs deeper integration with unified communications

68%
plan to invest in more communication channels to connect with patients
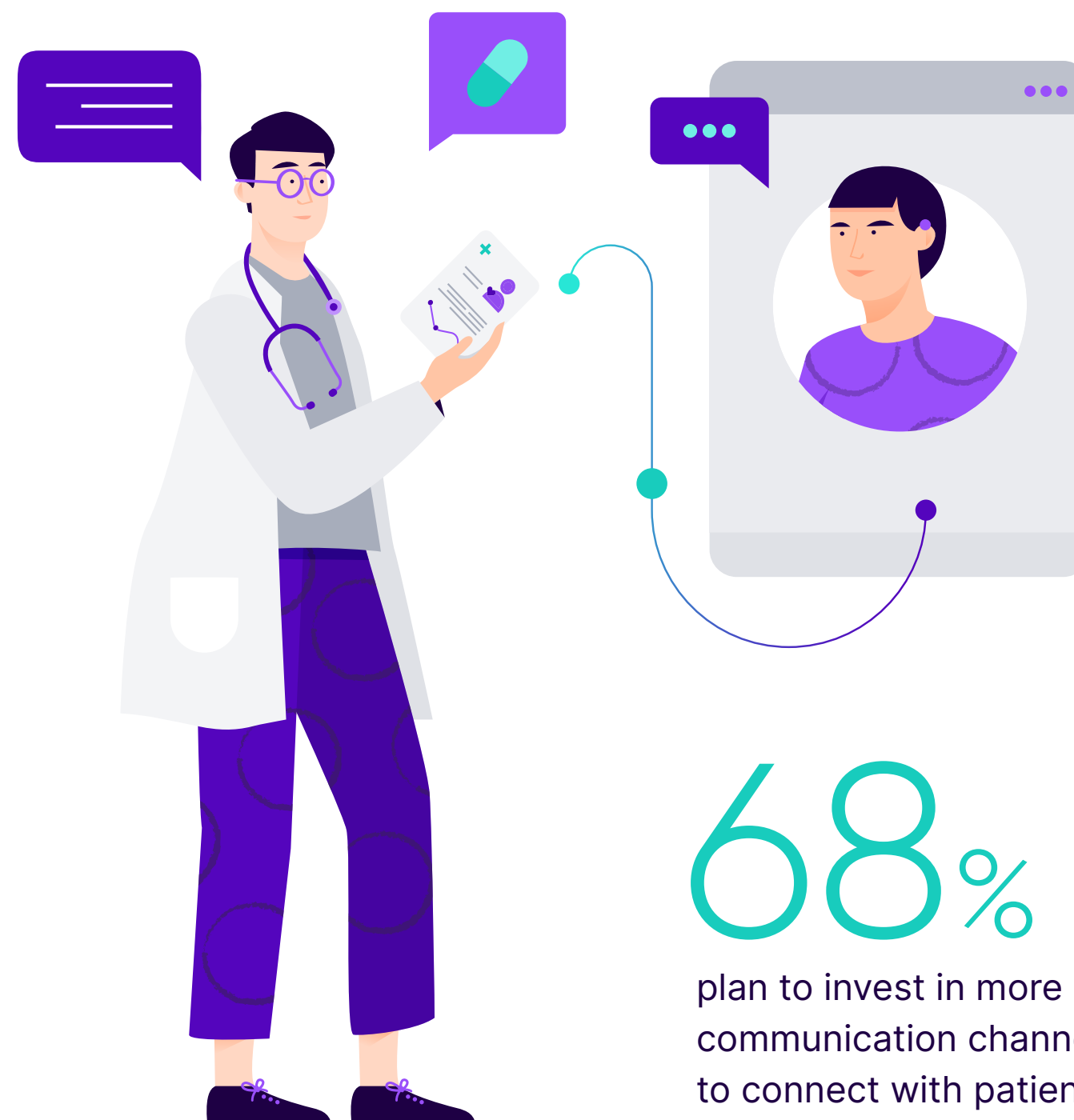
Better communication across the system can help create a digital-front-door experience for patients, and ensure that patients receive the information and guidance they need to work towards positive health outcomes.

As healthcare providers leverage their contact centers to engage with patients, the technology gathers and generates patient feedback and data that can inform the business. Modern contact centers are, by nature, data centers that offer robust reporting and analytics.

V. Fueling deeper patient and business intelligence

Hungry for data

Delivering a unified patient experience supported by digital capabilities and a modern contact center requires a deep understanding of patient needs and interactions. The contact center holds this data and must be able to effectively curate, analyze, and deliver insights to continually enhance PX.

The demand for data from the contact center is increasing, with the following shares of PX professionals reporting increased organizational demand compared to last year:

PX professionals see increased demand for data from the contact center

81%	Customer feedback and insights
75%	Customer data and analytics
74%	Interaction analytics
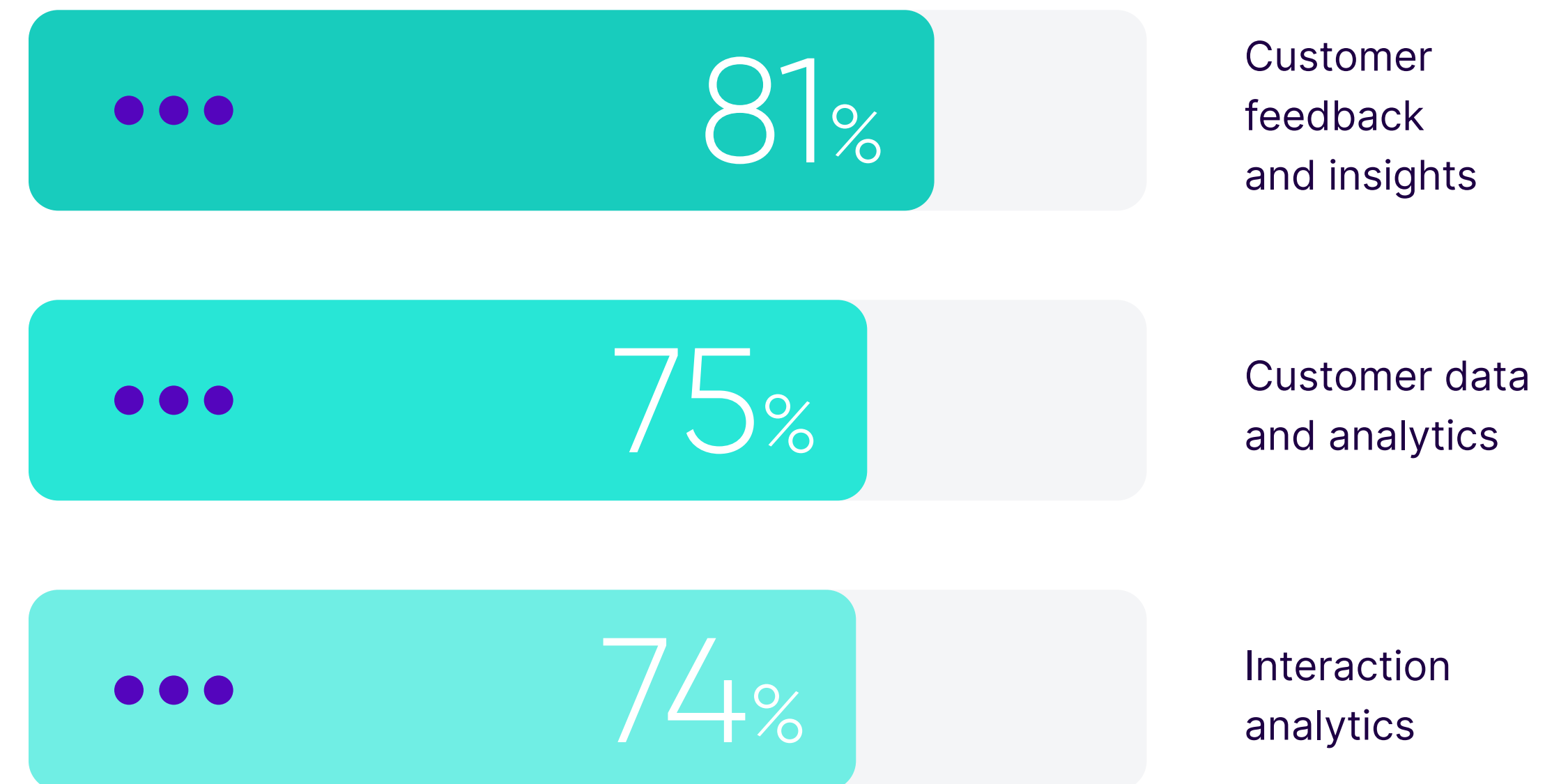
Providers increasingly recognize that without effective data analytics, it is virtually impossible to personalize the patient experience across channels, or effectively gather and use patient data.

73%

of providers want to gain deeper customer insights to share with the organization

Fortunately, modern cloud contact centers offer the functionality, HIPAA-compliance, and AI to capture patient data in real-time and deliver it to the business.

70%

of providers intend to invest more resources in gathering and using customer data and analytics

# The contact center is a rich repository of real-time HIPAA-compliant data

Modern cloud contact centers incorporate privacy and HIPAA-compliance while providing a rich repository of aggregated, anonymized, or protected patient data that can be used to personalize healthcare experiences and improve PX overall.

Standard survey-based approaches to gathering patient feedback on their experiences is characterized by long lag times in producing actionable intelligence and incremental improvements to PX. Cloud-based contact centers can enable next-generation approaches to Voice of Patient feedback that are more regular and actionable. Features such as speech analytics can deliver

sentiment analysis, help train patient representatives and indicate areas for improvement on an ongoing basis.

Patient engagement data can facilitate machine learning that "learns" the patient's preferences and needs and tailors future engagement or recommended next best actions to reflect that, rather than driving incremental organizational changes.

As healthcare demands more data from the contact center, modern cloud contact centers are able to keep pace with the demand and generate insights that can truly impact patient experience in new and enhanced ways.
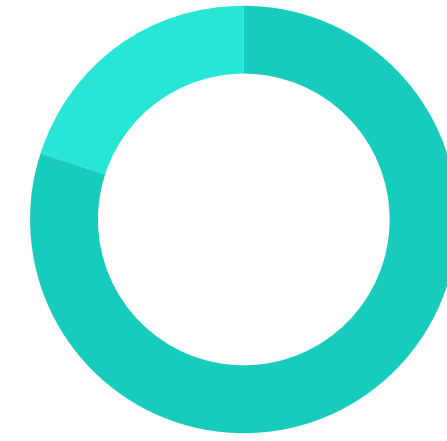
Share of providers who use speech analytics

Today:
28%

In two years:
42%
(+50% growth)
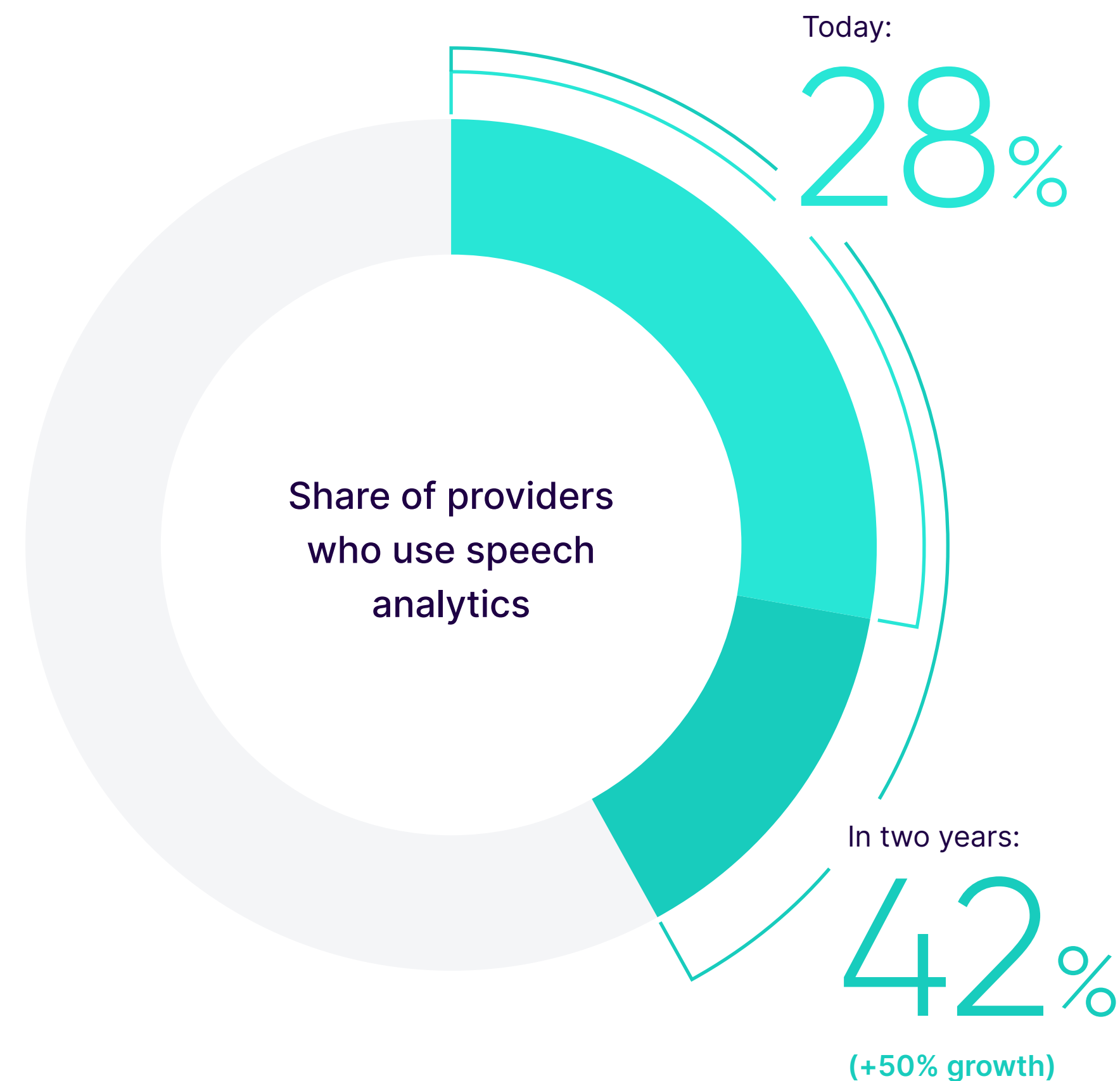
Survey demographics

PX professionals

Region
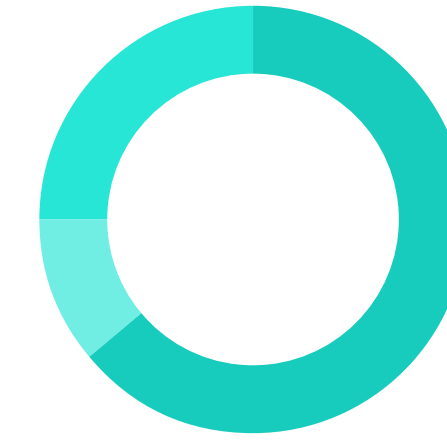- Asia-Pacific: 30%
- Europe: 29%
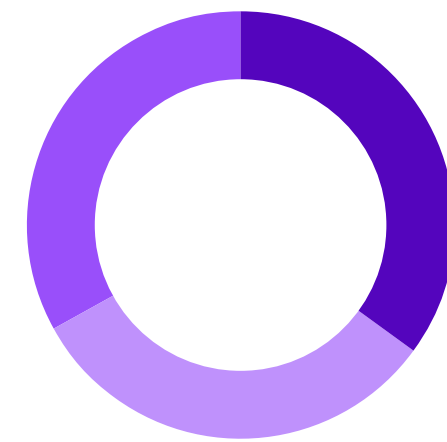- North America: 40%

Professional role
- PX/customer service/contact center leadership: 80%
- Contact center agent: 20%
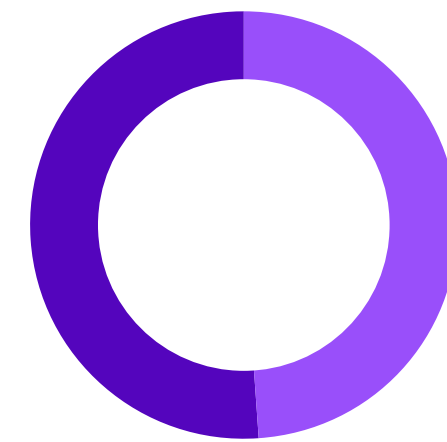
Software for customer service/PX
- Decision-maker: 64%
- Influencer: 11%
- Not a decision-maker: 25%

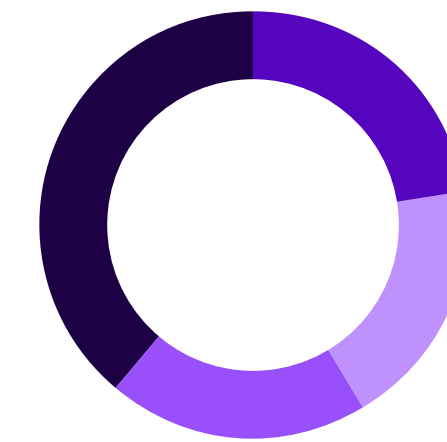## Patient sample

Region
- Asia-Pacific: 35%
- Europe: 32%
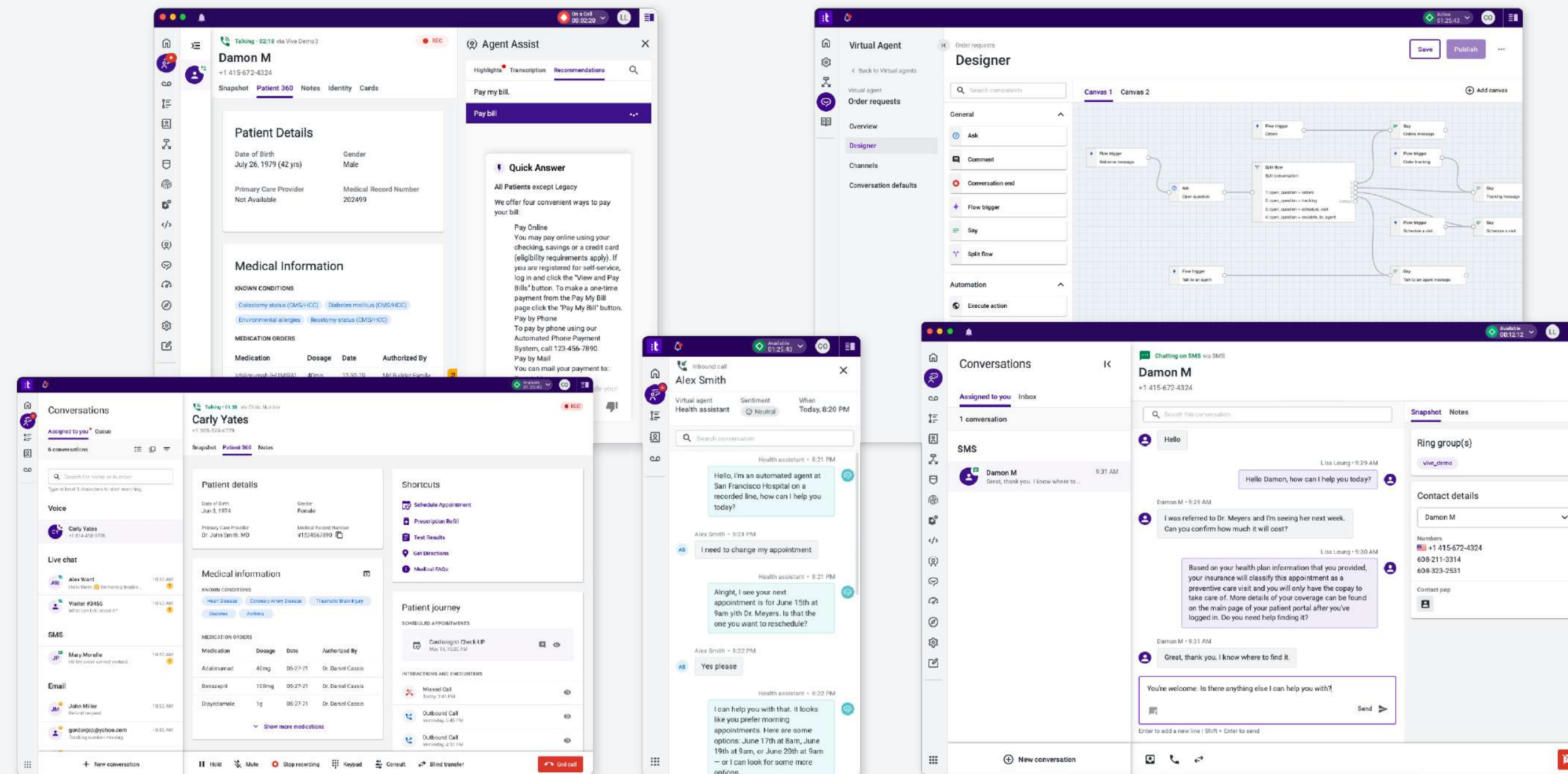- North America: 33%

Gender
- Male: 49%
- Female: 51%

Age
- 18-29: 23%
- 30-39: 19%
- 40-49: 20%
- 50-65: 39%

Note: some figures do not add up to 100% due to rounding.

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