# 5 Things to Know About the Future of AI in Experience

August 3, 2023

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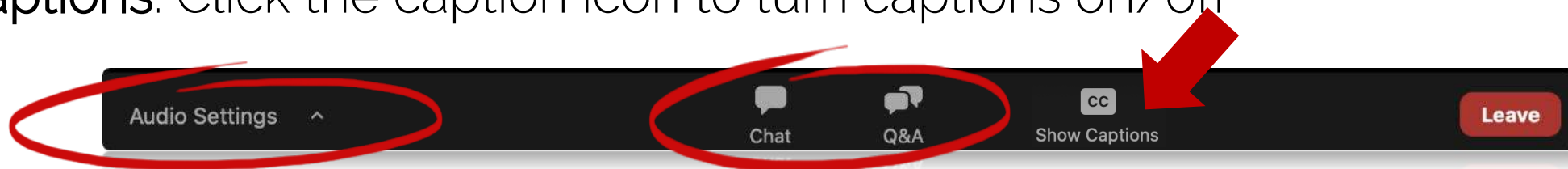
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Our Speaker

Adrienne Boissy, MD, MA
Chief Medical Officer
Qualtrics

WHAT ARE WE REALLY TALKING ABOUT?

Artificial Intelligence	Augmented Intelligence	Machine Learning	Deep learning	Large Language Models

+ Technology generated cognition

+ Human oversight of artificial intelligence

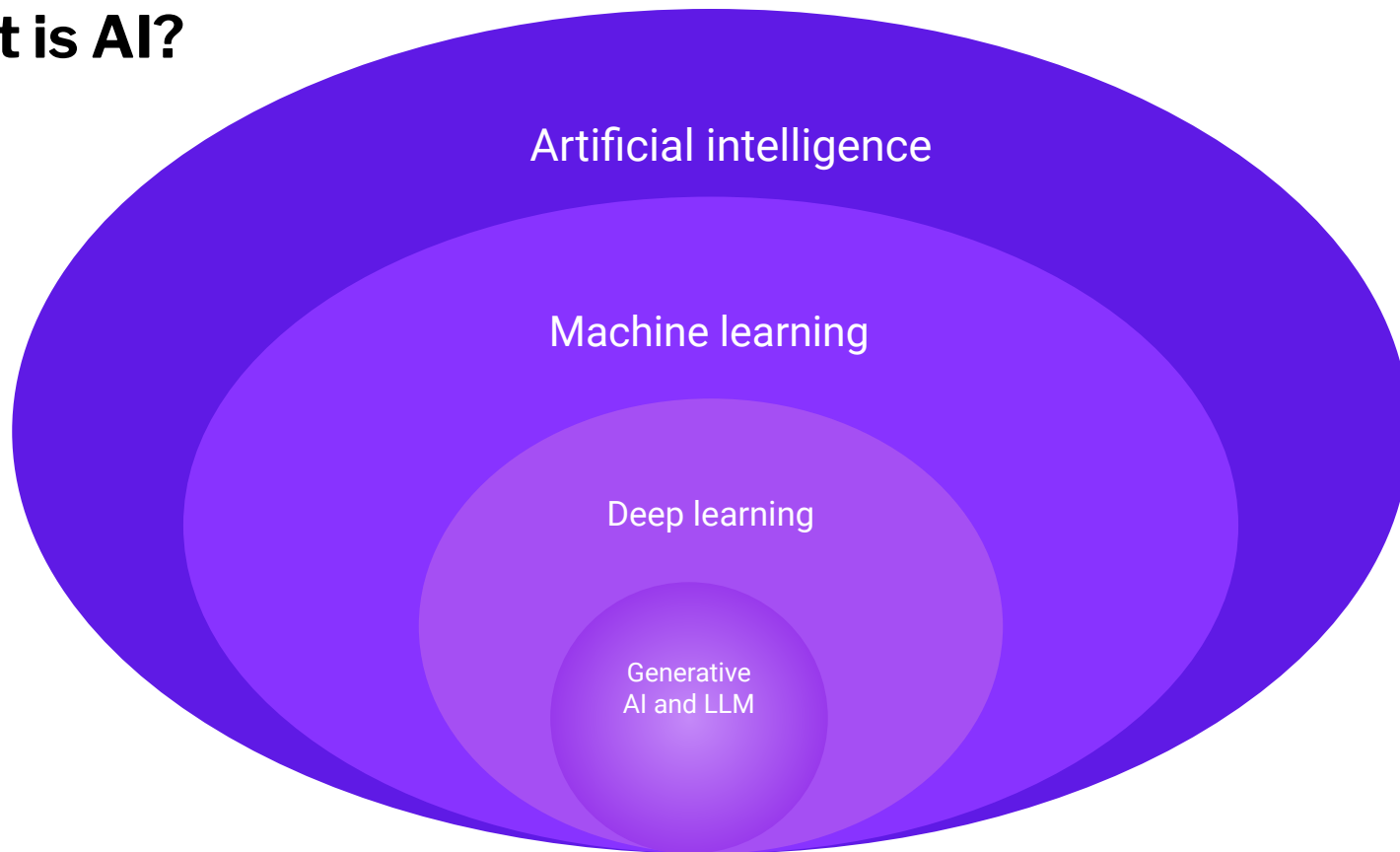+ Subset of AI wherein statistical methods/ algorithms improve AI with experience

+ ML algorithms with brain-like layers (neural networks) that can train itself

+ Ex Generative AI - Use of deep learning algorithms to generate new content or outputs

+ Data sources based on conversations, identifies sentiment and themes and can generate

+ Open AI's Chat GPT and Google's Bard

What is AI?

Artificial intelligence

Machine learning

Deep learning

Generative
AI and LLM

Intelligent Processing

Increasing complexities & costs

Straight Through Processing

Artificial Intelligence *with deductive analytics*

Machine Learning *with prescriptive analytics & decision engines*

Robotic Process Automation *with digital triggers or self service*

Robotic Desktop Automation *with manual intervention*

Data-driven

Process-driven

Doing

Thinking
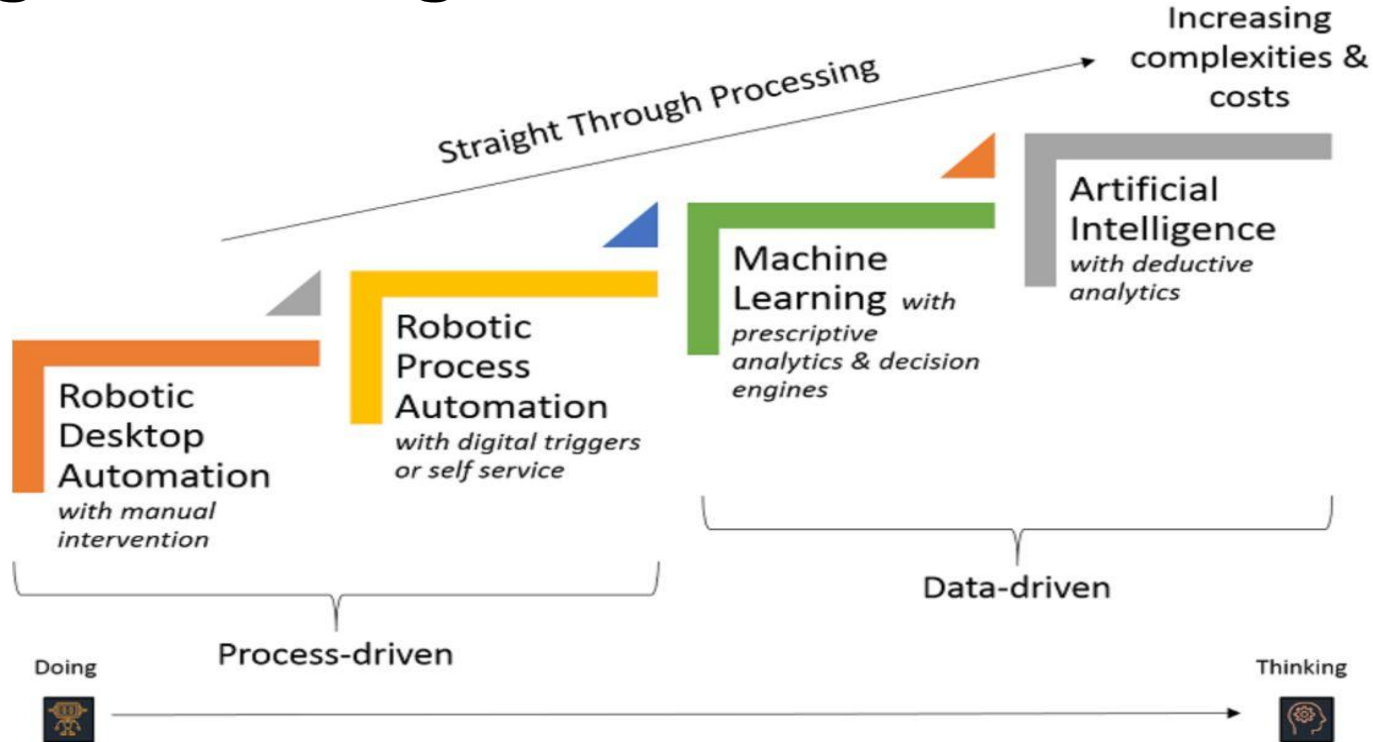
Image Source: Medium.com

ChatGPT is everywhere in the news

ChatGPT and generative AI tools have brought AI into the hands of everyone with an internet browser

Nearly every day a new application is discovered that brings excitement and opportunity

Data security and privacy concerns continue to feature significantly in the discussion

Forbes

INNOVATION • DAILY COVER

'I've Never Hired A Writer Better Than ChatGPT': How AI Is Upending The Freelance World

Ethics & AI: Crash Course

1

Do good.

2

Do not harm.

3

Respect choice.

4

Be fair & equitable.

Ethics & AI: Crash Course

1	**2**	**3**	**4**
Do good.	Do not harm.	Respect choice.	Be fair & equitable.
Beneficence	Non-maleficence	Autonomy	Justice

Ethics & AI: Healthcare Lens

Ethics Principle	AI Translation
Do good.	+ Clarity of how AI will be used + Align to values
Do not harm.	+ Clarity as to how AI won't be used + Protecting identification + Potential amplification of bias (racism, financial, automation, etc)
Respect choice.	+ Consent for how data is used and monetized + Ability to opt out + Respect privacy
Be fair & equitable.	+ Transparency as to how models are built + Safeguards for controlling for bias + Co-design

Use early indicators of loyalty in feedback

High Program Maturity

Effort score
Find points of friction, confusion, and inefficiency; identify drivers impeding customer value

Emotional intensity score
Identify areas of brand equity, find drivers of positive or negative emotions

Maturity

Sentiment score
Explore polarizing topics, beacon for moments of truth, items to fix

NPS, OSAT/CSAT, Forrester CX index *
Post-hoc validation of customer's impressions

Low Program Maturity

Leading Indicator   **Time**   Lagging Indicator

2023   * Only available through surveys

Use AI to create empathetic experiences at scale

Effort
+ **Customer "effort" language and experience has high correlation to inefficiency, costs, loyalty.**
+ Apply AI algorithms to extract effort language from calls, chats, survey feedback - that will provide a guidepost on the areas requiring CX optimization.

Emotion
+ **Customer "emotion" markers have a high correlation to brand equity and loyalty.**
+ Extract love markers, hate markers, rage click behaviors, expressed frustration markers from customer interactions and conversations.
+ Analyze, quantify and prioritize areas for improvement - they will provide you with the road map to better products and services, and more customer lifetime value and loyalty.

Empathy
+ **Agent / employee empathy has a high impact on CSAT and loyalty.**
+ Seek to understand and track when empathy is required, and applied by customers, and use these insights to help coach, improve, and develop your employees and even your digital / automated engagement platforms.

AI & Healthcare Experience

ACCESS & REVENUE CYCLE	**CONVERSATIONAL ANALYTICS**	**PERSONALIZATION & PREDICTIVE ANALYTICS**	**PERFORMANCE MONITORING AND IMPROVEMENT**	**CLINICAL CARE**
Process automation, detect , understand pain, suggest paths to better experiences for all	Deep understanding of human emotion	Unifying experience ID Segment identification and value drivers	Service recovery and continuous improvement cycles	Drive efficiency, better outcomes, identify risk, decisional support, patient comms

REAL-TIME COACHING
Help the frontline in the moment to better serve patients

ANALYZE & TAKE ACTION
Understand and surface insights, recommendations, predictions, and next best actions

DRIVE AUTOMATION
Remove manual, repetitive work, enabling your frontline to focus impactful work

Healthcare is still too hard

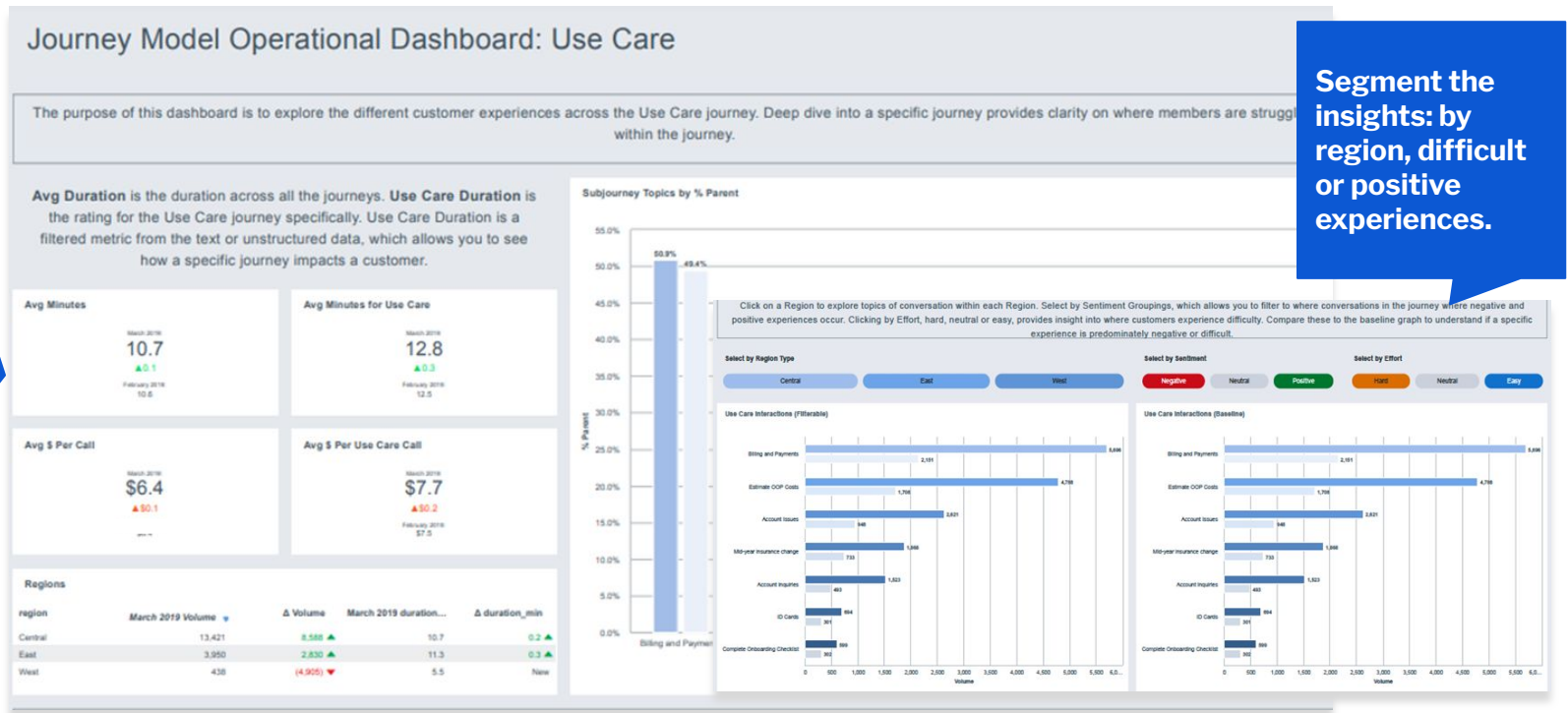**1 in 4** Americans report difficulty paying for hospital/provider bill

Among adults who say they tried to shop around, **69%** called the experience somewhat difficult or very difficult

40% of calls coming into contact centers in healthcare originate out of a *failed attempt on digital channels*

AI To Know #1 - Access and Rev Cycle:
AKA Making It Easier

Identify average call duration and compare the cost of all calls to the cost of journey - specific calls.

Segment the insights: by region, difficult or positive experiences.

Empowering Agents with relevant resources and recommendations using Real-Time Agent Assist (RTAA) & Automated Call Summaries (ACS)

This means:
- Scoring every call for customer experience and required tasks
- In moment suggestions to help agent with issue
- Automated summaries
  - Understanding of language, sentiment, and context

AN EMPOWERED FRONTLINE
Agents focused on the outcome for the customer, not hitting targets.

AARP were able to automate compliance-based requirements to save the frontline from unnecessary admin and let them focus on the customer.

MOVED TO A DESIRED BEHAVIOR-BASED MODEL
By de-emphasizing scoring and emphasizing behaviors that make a great experience, customer satisfaction almost doubled. And their conversion rate went up. All while reducing agent attrition by 40%.

Agents are more effective and report increased job satisfaction. Customers are more satisfied and happier with the service they receive. This has increased their score by 6 points in the first 3 quarters. Their target was 84, and now they're budding up against 90.

Clearly shows agents opportunities and what to focus on first. They love it!

Brian Clancy, Head of Consumer Care Learning & Performance Improvement at AARP

AARP®

HIGHLIGHTS

50%
RISE IN CUSTOMER SATISFACTION

40%
REDUCTION IN AGENT ATTRITION

20%
RISE IN CALL CONVERSION

Picking up the frustration at one organization…

AWARENESS   CONSIDERATION   ACCESS   SERVICE DELIVERY   ONGOING CARE

Campaign Mgmt.
Events / Community
Quality & Reputation
Networks / Contracting
Referrals
Coverage / Benefits
Profile Creation
Provider Search
Scheduling
Patient Portal
Call Center
Outreach
Pricing Transparency
Registration and Wait
RN/Doc Interaction
Discharge Process
Billing
Wellness / Care Management
Social Determinants of Health (SDOH)
Population Health

29% difficulty navigating online appts

40% errors with cost estimation

Majority patients leaving apps due to wait

18% Website error preventing bill pay

AI To Know #2 - Conversational Analytics
AKA **Making People Feel Cared for**

82%

of patients want to feel cared for

92%

of employees will stay when you get emotional connection right

ChatGPT Outperforms Physicians in High-Quality, Empathetic Answers to Patient Questions

While AI won't replace your doctor…
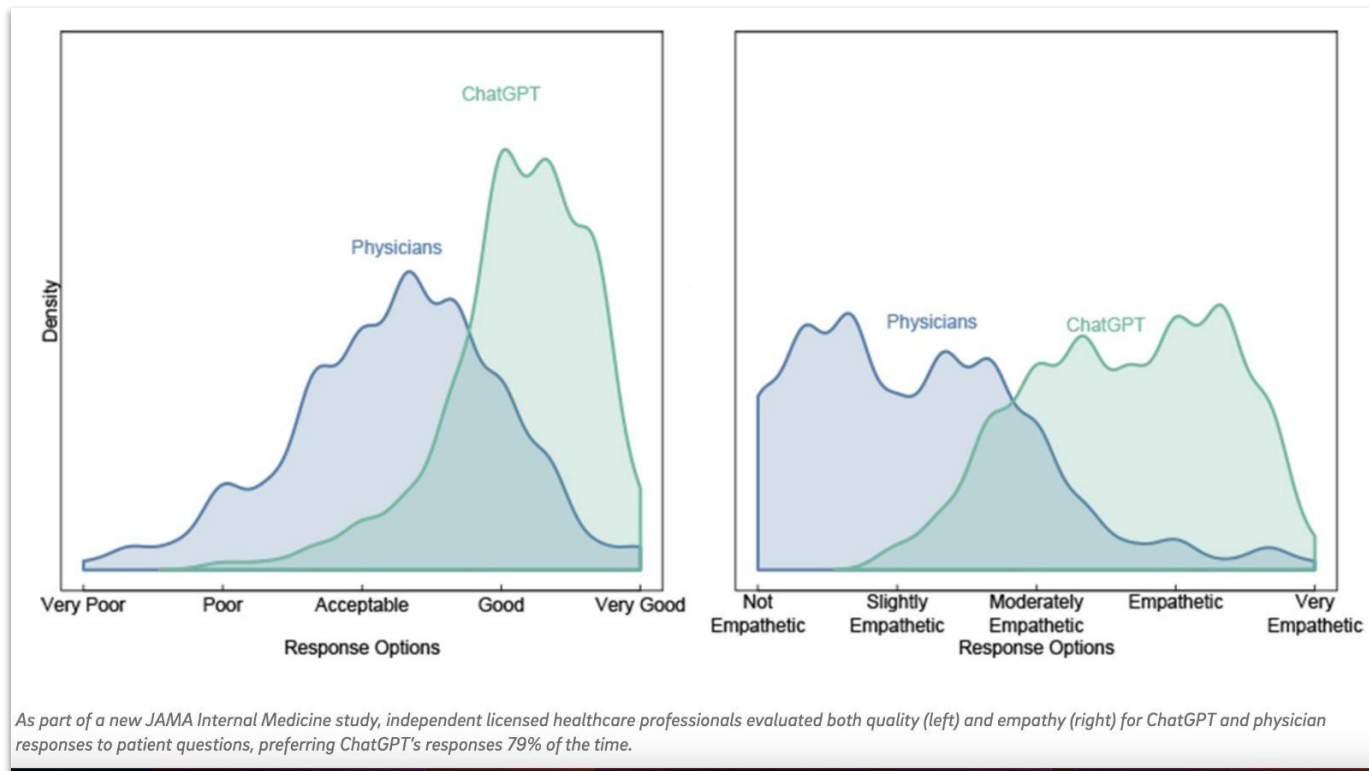
As part of a new JAMA Internal Medicine study, independent licensed healthcare professionals evaluated both quality (left) and empathy (right) for ChatGPT and physician responses to patient questions, preferring ChatGPT's responses 79% of the time.

AI Use Case #2 - Conversational Analytics
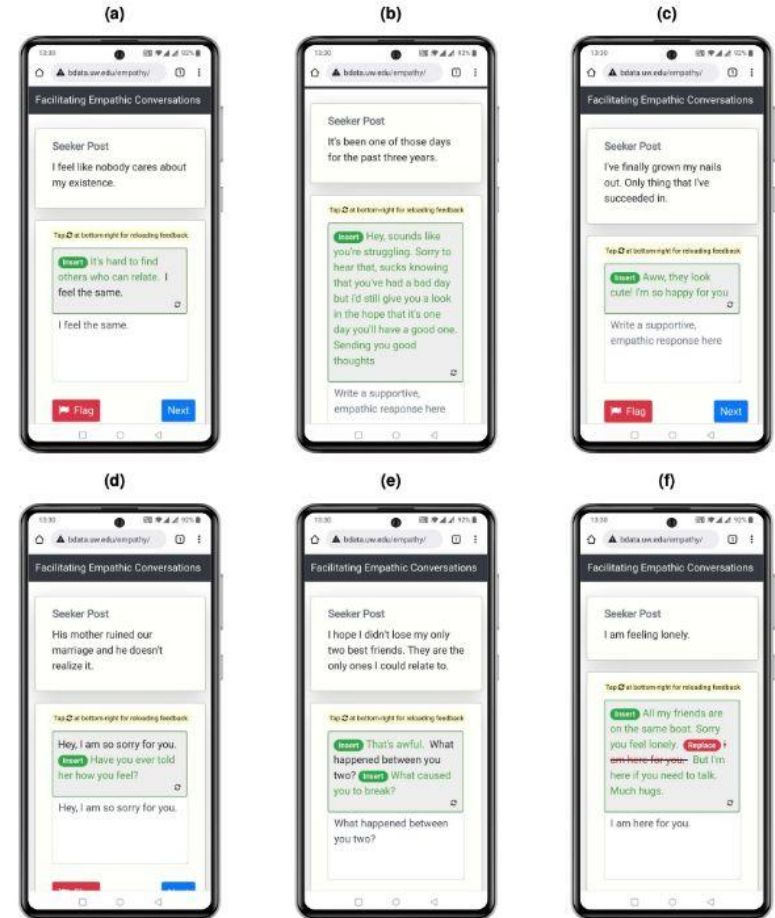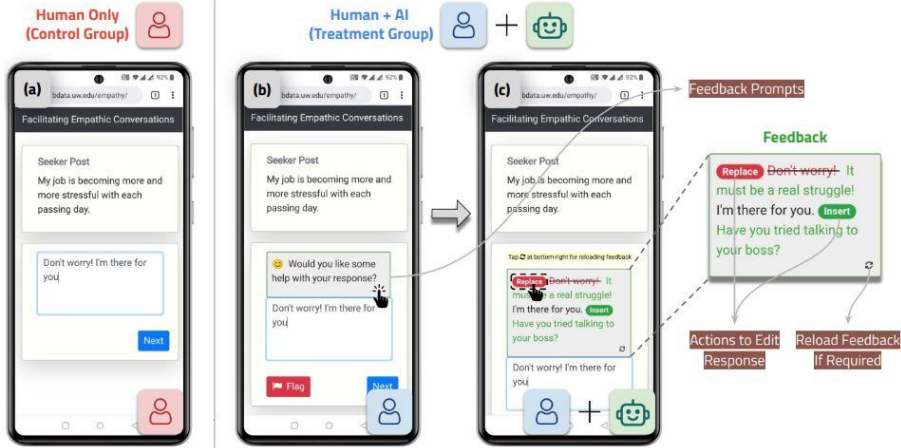
Source

AI Use Case #2 - Conversational Analytics
Conversational Feedback

+ Infusing AI into feedback gathering to make it more human

+ From any source

+ Break out from understanding patients solely based on their choices from predefined answers to our static questions

+ Generative answers in proper emotional tone and contect
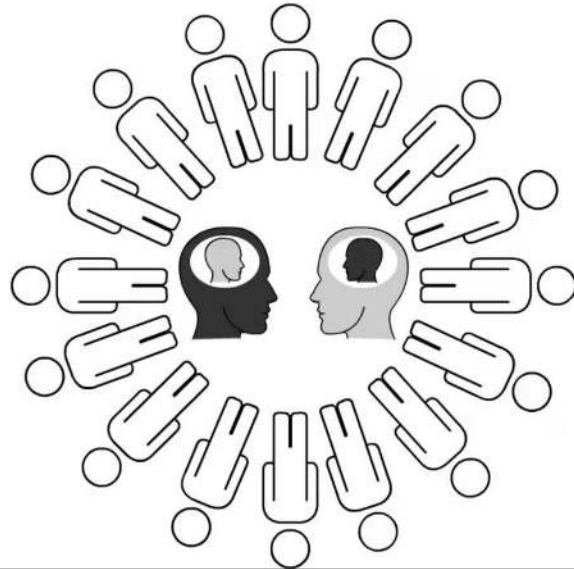
AI To Know #3 - Personalization and Prediction AKA Feeling Known and Knowing

The clinical impact of misidentification

86% of respondents say they have witnessed or know of a medical error resulting from misidentification

PATIENT-CENTERED CARE

Concept by Sachin Jain., Art by Matthew Hayward © 2014 All Rights Reserved

AI To Know #3 - Personalization and Prediction
AKA Feeling Known and Knowing

Experience iD is an **intelligent database**,

that pulls in **ALL experience and operational** data customers and employees share,

Organizes it into **unique individual profiles** with **end-to-end journeys**,

empowering companies to **segment** valuable cohorts

to **identity new** opportunities and **personalize experiences at scale.**
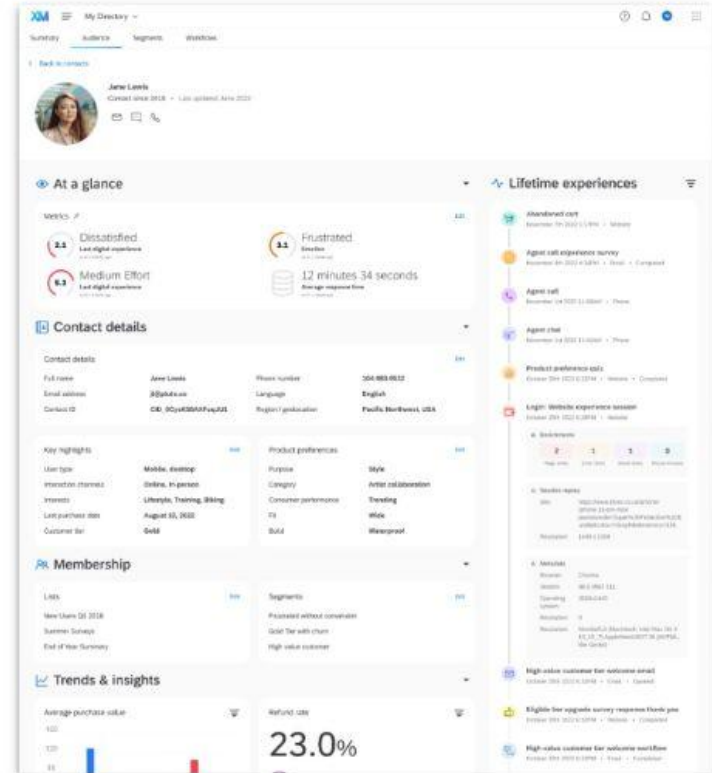
AI To Know #3 - Personalization and Prediction

Increase customer retention across multiple segments

A banking customer trying to open a new account online is having issues with the site, a chat bot pops up, the customer shares their frustration

Their emotion, effort, intent is captured in their unique experience profile that also shows their demographics and their experience journey

Profile details show us this customer is High LTV, but there are also other segments that experienced this web issue

For this High LTV customer, we are able to immediately route them to a customer service representative for a follow up call and send an immediate message to the web/product teams to fix the bug on the site

A Slack message goes out to web/product

A customer care rep reaches out directly to the High LTV customer

Signals	Profile	Segments	Add teams	Decide actions/routing
◼ Web engagement	◼ Emotion	◻ High LTV	◼ Marketing	◻ Marketing recovery campaign/Marketo
◻ Preference data	◼ Effort	◼ Low LTV	◻ Regional managers	
◻ Reviews	◼ Intent	◻ Business owner	◻ Branch managers	◼ Send promotional offer/Marketo
◻ Transaction history	◼ Demographics	◼ New customer	◼ Web team	
◻ Call center	◼ Journey	◻ Credit card holders	◼ Product team	◼ Fix bug/Slack
◼ Chat	◻ Preferences	◻ At risk	◼ Customer care	◼ Call center/Zendesk

AI To Know #3 - Personalization and Prediction
Understand Patient Journeys, at scale

+ Patient journeys are becoming increasingly complex, making it impossible to optimize them

+ Understand and optimize omni-channel journeys driving highly personalized patient experiences at scale

+ Apply AI algorithms to extract effort language from calls, chats, survey feedback - that will provide a guidepost on the areas requiring PX optimization.
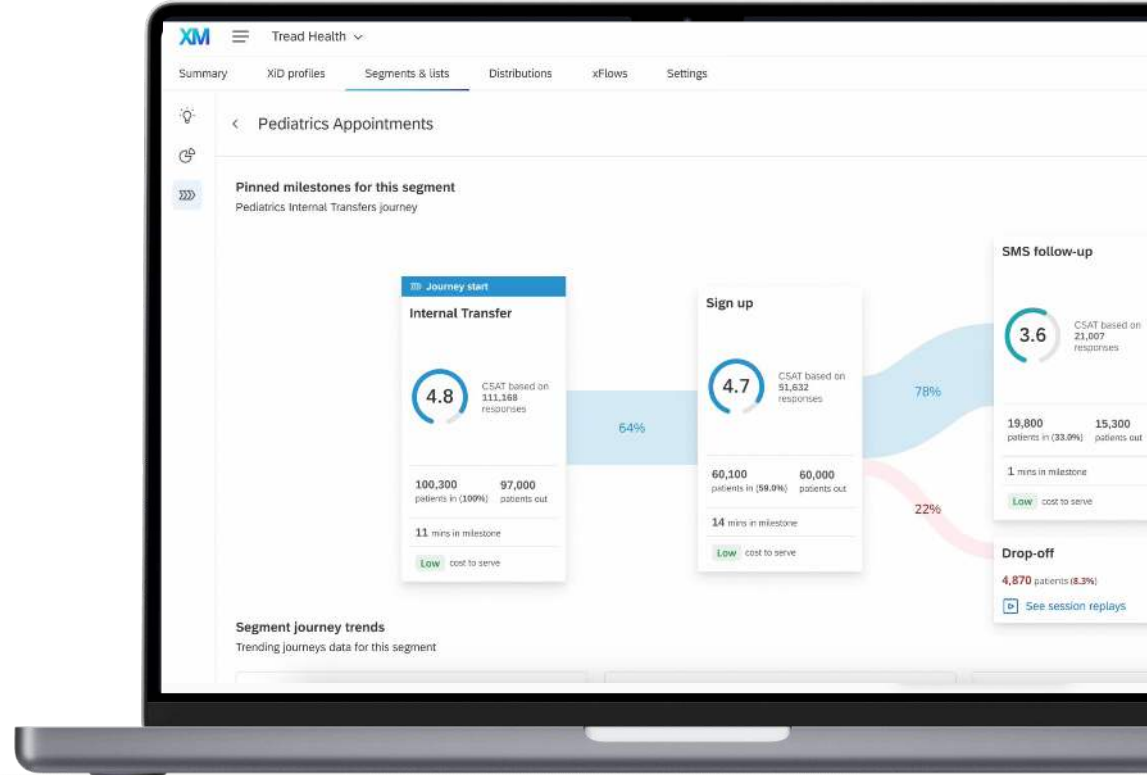
AI To Know #3 - Personalization and Prediction
AKA Feeling Known and Knowing

COMPANY-WIDE RESEARCH AT THE SPEED OF ATHLETES (FAST ONES)

UNDER ARMOUR

Challenges	Actions Taken	Early Success
Organizing panel for wear testing outreach Product team was wasting tons of time each season trying to identify and get in contact with the right group of product testers	**Consolidate and continuously grow the product tester panel within XiD**	**100x increase in product tester panel** Went from a database of 100 to over 10,000 due to ability to organize and easily add **2,000 products evaluated in less than a year** Easy access panel and integration with Fedex enabled speed & scale
Leveraging panel across organizations within the business The Consumer Insights and Digital teams also ran research studies throughout the year but had difficulty finding relevant panels of athletes	**Institute contact frequency and attribute filtering to allow shared panel**	**Efficiency across disconnected research teams** Product, Consumer Insights, & Digital all confidently leveraging the same athlete panel

AI Use Case #4 - Performance and Service Improvement

Four Insights-Driven Action Loops

Strategic Decision-Making — Apply insights to key strategic decisions

Process Integration — Connect insights directly into workflows to create customized experiences

Continuous Improvement — Identify, prioritize, and take action on opportunities to solve root causes of problems and to create differentiated experiences

Immediate Response — Close the loop with people based on feedback (and also based on inference) and take corrective action on solvable problems

63% of people say organizations need to do a better job of listening to feedback

Why Close the Loop with Customers?

"The only thing worse than being talked about is not being talked about." **Oscar Wilde**

☑ Deepen and strengthen relationships

☑ Identify unknown issues

☑ Real-time opportunity to engage customers

☑ Understand needs and expectations

☑ It is a competitive differentiator

☑ Encourages future survey participation

After an effective service recovery, customers are often more loyal than if no error happened.

Source: Augusto de Matos, Henrique and Rossi. "Service Recovery Paradox: A Meta- Analysis."
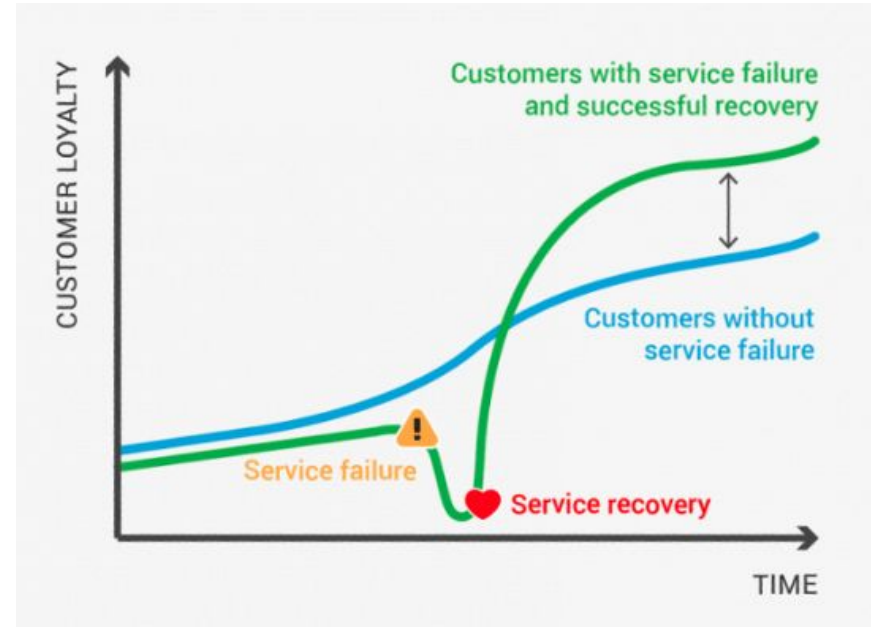
Inner and Outer Loop Design

The "inner loop" of the a CX feedback program promotes individual coaching and learning, while the "outer loop" supports improvements that go beyond individuals or teams

Inner Loop

- Identify and coach behaviors
- Follow up with customers
- Assess the experience
- Customer engages with us

Individual behavior and learning

Team Huddle

Outer Loop

- Identify issues and root causes
- Define actions and prioritize
- Implement structural improvements
- Communicate improvements to employees & customers

Structural improvements

Source: Bain & Company

Closed-Loop Success Stories

+ Financial Services organization implemented a trigger, ticketing, and closed-loop system that **improved NPS by 10 points** and **speed to action by 10x**.

+ Australia based homewares manufacturer sends immediate triggers to employees to take direct action to resolve customer issues. This **decreased resolution time by 95%** and led to a **9 point increase in NPS**.

+ Multinational FMCG retailer segmented its customers across a wide range of variables. This helped the company **tailor and target engagements** for different customer types while **reducing the time to action from weeks to days**.

Increase cost savings   Reduction in churn   Cross-sell/up-sell   Leverage Promoters

Picking up the frustration at one organization...

Campaign Mgmt.

Events / Community

Quality & Reputation

Networks / Contracting

29% difficulty navigating online appts

Scheduling

Patient Portal

Call Center

Outreach

Pricing Transparency

40% errors with cost estimation

Social Determinants of Health (SDOH)

Wellness / Care Management

Population Health

Referrals

Coverage / Benefits

Profile Creation

Provider Search

Registration and Wait

RN/Doc Interaction

Discharge Process

Billing

18% Website error preventing bill pay

AWARENESS **CONSIDERATION** **ACCESS** **SERVICE DELIVERY** **ONGOING CARE**

Majority patients leaving apps due to wait

AI Use Case #4 - Performance Improvement
AI Powered Coaching

+ Utilizing generative AI, managers can receive coaching to deeply understanding the insights that drive action. Empower managers with key summary headlines, focus areas, and straightforward action steps.

+ Personalized, easy-to-understand next steps for managers

+ Reduce noise with targeted understanding of what's important for managers to focus on

+ Advises managers on most effective ways to accelerate improvements in their employees' experience, informed by best practices
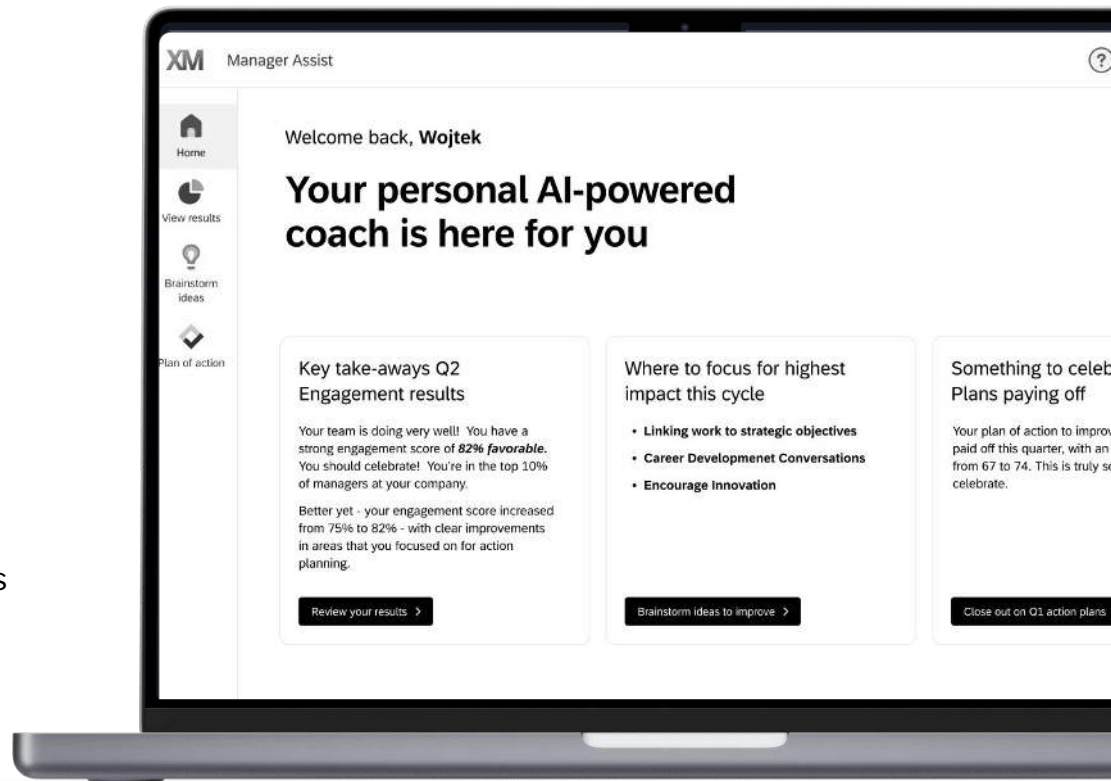
AI To Know #5: Clinical Transformation

$360 billion   Could be saved annually if adopted more widely in healthcare, according to McKinsey and Harvard researchers

67%   Of organizations plan to increase their level of spending in technology and are prioritizing investments in data & AI.

https://www.accenture.com/us-en/services/ai-artificial-intelligence-index
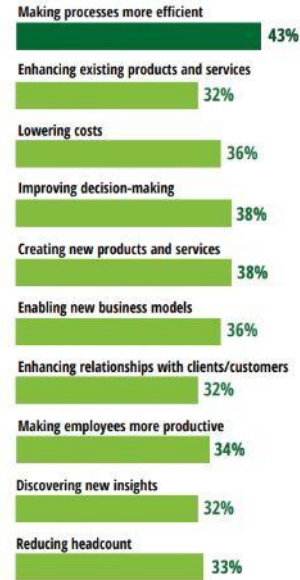
AI To Know #5: Clinical Transformation

Making processes more efficient is the most important outcome, followed by enhancing existing products and services, and lowering costs

Please select the top 2 most important outcomes you are **trying to achieve**

Outcome	%
Making processes more efficient	34%
Enhancing existing products and services	27%
Lowering costs	26%
Improving decision-making	20%
Creating new products and services	20%
Enabling new business models	18%
Enhancing relationships with clients/customers	17%
Making employees more productive	14%
Discovering new insights	14%
Reducing headcount	10%

Note: Total number of respondents, N=120

Please rate to what **extent*** you have achieved the following outcomes through your **AI implementations**

Outcome	%
Making processes more efficient	43%
Enhancing existing products and services	32%
Lowering costs	36%
Improving decision-making	38%
Creating new products and services	38%
Enabling new business models	36%
Enhancing relationships with clients/customers	32%
Making employees more productive	34%
Discovering new insights	32%
Reducing headcount	33%

*Achieved to a high degree

Source: Deloitte's State of AI survey.

https://www2.deloitte.com/us/en/insights/industry/health-care/artificial-intelligence-in-health-care.html

AI To Know #5: Clinical Transformation

PERSONALIZATION	**PREDICTING RISK**	**REDUCTION OF ADMIN BURDEN**	**DISCOVERY**	**RESEARCH**
Segmentation, clinical care paths, health coaching	Risk of readmission, relapse, burnout, retention, clinical disease	Ambient listening and note generation, patient communications, prior auths	Medical imaging, drug development, deeper understanding of large datasets	Proactive identification of patients for research, genetics

Create an omnichannel listening strategy to drive change

1

Explore your AI landscape.

+ Who owns data and AI governance?

+ Guiding principles?

+ What are their desired outcomes?

2

Partner on strategy

+ Where can you get feedback?

+ Where do you want to?

+ Connect to digital, rev cycle, access efforts

3

Learn more. Have a point of view.

+ How do you move data > insights > action?

+ How will you measure value?

+ **YOU ARE THE EMPATHY AMPLIFIERS. USE YOUR VOICE...AND NOW.**

Improve patient access & financial experience

- Analyze speech to detect topic, effort, intensity of emotions and empathy

- Deflect calls that can be self serviced and improve agent performance

- Omnichannel program which includes listening posts set up through Website, In-App, Chat, Post-call feedback + Speech, Chat, Call Logs (non-survey feedback)

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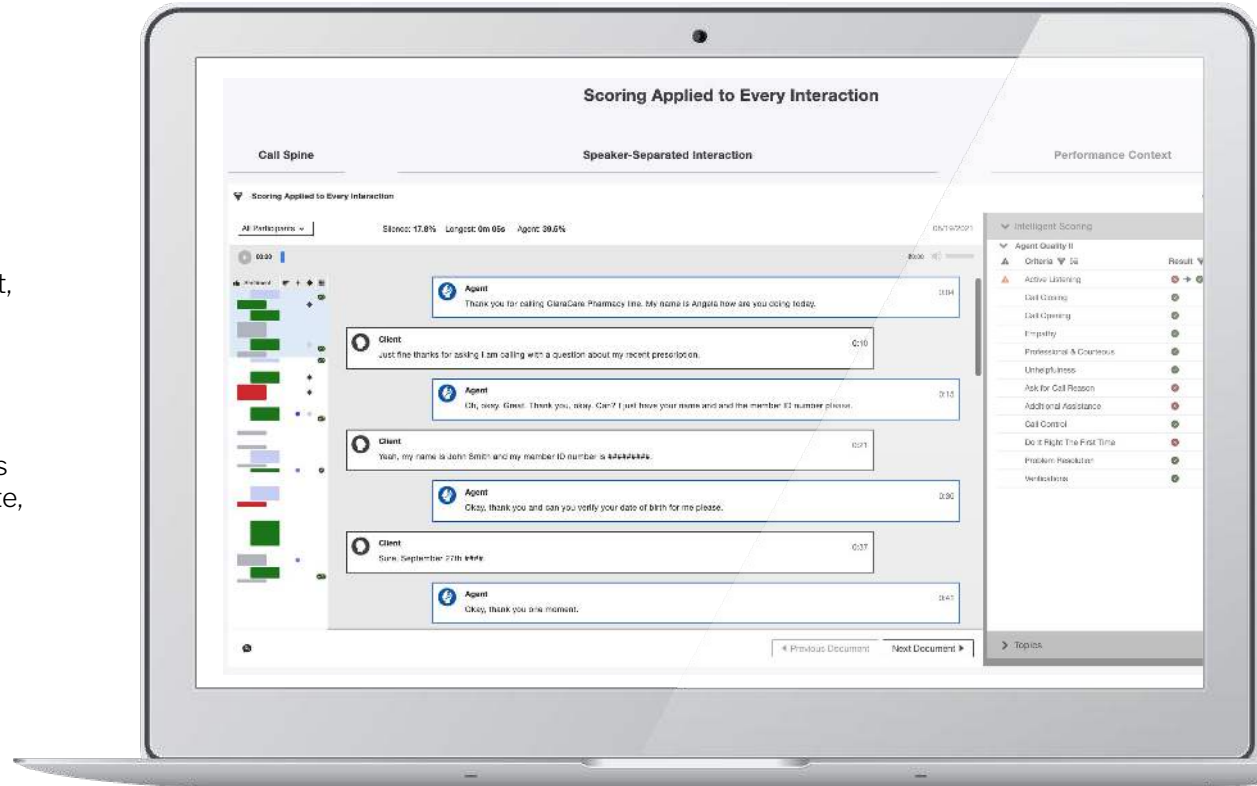
Upcoming Events & Programs

WEBINARS

August 8 | Using Unsolicited Patient Complaints to Improve Patient Outcomes and Organizational Culture

August 17 | Elevating Experience

August 22 | Don't Get Lost in Translation: Advancing Health Equity and Inclusion

CONNECTION CALLS/PX CHATS

August 11 | PX Chat: Lost Belongings

PROGRAMS

August 8-29 | CPXP Prep Course

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