Tegria

Transforming Healthcare Together

Selecting a Conversational AI Partner

6 Considerations To Guide Your Decision-Making Process

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Introduction

Conversational AI, widely used in chat and live voice interactions, has great potential in healthcare, with the ability to save the U.S. up to $350 billion annually. Early adopters of web-based chatbots are already seeing significant cost and time savings.

Deployed on websites, mobile apps, and inbound call centers, conversational AI supports customer service representatives by handling routine tasks like appointment scheduling, password resets, prescription orders, bill payments, and lab result inquiries—organizations using AI-powered self-service report time savings, allowing staff to focus on more complex, personalized interactions.

There are a lot of factors to consider when selecting a conversational AI partner. Here are six key considerations to help guide your decision.

ENGAGEMENT SUMMARY:
THE FROEDTERT & THE MEDICAL COLLEGE OF WISCONSIN HEALTH NETWORK

Tegria helped the Froedtert & the Medical College of Wisconsin Health Network systematically review and select the best conversational AI partner to meet its needs.

Tegria played an instrumental and complete end-to-end role in identifying our preferred third-party conversational AI partner. From digital strategy recommendations to vendor selection, Tegria supported our executive facilitators and sponsors in identifying business requirements, conducting vendor outreach, leading vendor RFI, RFP communication, hosting product demonstrations, and soliciting participant feedback through qualitative and quantitative surveys.

In parallel to stakeholder management, Tegria also worked with our finance, contracting, security, purchasing, and legal teams to ensure governance and architectural requirements were met. While this effort was absolutely holistic and collaborative, Tegria's leadership played a critical role in acceler- ating the end-to-end AI vendor selection process. I would highly recommend Tegria as a technology advisor for any healthcare organization looking to identify and select a third-party technical partner that is tailored to your specific operational and patient experience and engagement objectives."

DR. BRADLEY CROTTY, MD, MPH, Chief Digital Officer, the Froedtert & MCW health network

These considerations should guide your conversation with any prospective AI vendor.

CONSIDERATION 1

Specific, Verifiable Healthcare-Specific Use Cases

A complete set of organizational requirements driven by cross-functional representation is an essential prerequisite in developing your internal RFI and RFP process. As you market your organizational needs to potential vendors, they must confirm they understand your use case requirements and are available to demo your use cases in a live production environment.

> **EXAMPLE:** Preconfigured use cases such as end-to-end appointment management will need to be structured to include both direct and indirect scheduling with the ability to create, reschedule, cancel, and confirm an appointment using voice, chat, mobile, and SMS communication channels.

CONSIDERATION 2

Confirming Existing Technical Compatibility and Integration

Your internal cross-functional team representative of your IT, EHR, and product owner specialists will provide their current infrastructure baseline, which you will include in your vendor RFI and RFP. This is an essential prerequisite step to understanding the complexity, cost, and timing needed to enable and support a conversational AI implementation. This analysis will also be critical to ensuring your organization can create a truly omnichannel experience that supports customers throughout the digital engagement journey.

> **EXAMPLE:** Transposing a vendor demonstration and tailoring that visual to your specific organizational reality is essential to addressing any technical, resource, or system gaps that could challenge your conversational AI implementation. In this example, be specific in your RFI and RFP to include the technology you plan to keep and how the conversational AI system will need to work with the existing infrastructure and cloud-based investments you have. Pay attention to your voice (IVR), SMS (gateway), web, and mobile application environments. Be specific with your AI vendor when asking for verifiable client references with the same technology as yours. For example, if your organization is using Cisco, be sure to ask about the requirement for ECE to support an omnichannel experience that your AI solution will work with. Confirm if the AI vendor can or will use your existing SMS gateway or if they will need to use their own proprietary system. While you are considering the implications of these decisions, you may also consider doing an analysis on a cloud-based SaaS solution that may include a Contact Center as a Service with the desired pre-built conversational AI features and functionality.

EHR Operational Readiness and Enablement

As you consider a conversational AI vendor to leverage existing EHR functionality, your internal cross-functional team will seek EHR guidance from your preferred EHR provider to review the desire to introduce a conversational AI capability. As your team explores this opportunity, your organization will actively look at your current state of appointment management, including open, direct, and MyChart (Epic) user account activity. Your preferred EHR consultants will have insight on your conversational AI vendor and will often have implementation and design materials that can be readily provided.

> **EXAMPLE:** When reviewing the possibility of adding a front-end conversational AI voice, chat, or mobile assistant, your internal assessment will require a review of the current enabled product and service capabilities. In many cases, an internal review of existing functionality, including open, direct, and MyChart (Epic) scheduling, requires enablement and optimization to realize the full benefit of adding a conversational AI solution. Your discussions with your preferred EHR vendor will also surface road mapping considerations that can be used to prioritize your conversational AI use cases—examples can include MyChart password support, bill pay, Rx refills, or the use and prioritization of a webchat bot. As EHR systems evolve, their product offerings will include AI capabilities that should be considered when you are developing your vendor RFI, RFP, and final, prioritized use case selection process.

Preconfigured Prioritized Use Cases

Speed and quality are essential to ROI and adoption. As you develop your RFI and RFP, consider using specific functional use cases that have already been developed and are readily available for faster implementation and deployment. Has your preferred AI vendor designed and implemented the types of prioritized use cases your organization is looking to provide to its patients and consumers? Common use cases, driven by client requirements, typically include appointment management (schedule, cancel, confirm, reschedule), Rx status and refills, bill pay, MyChart password account activation, and password resets. More elaborate examples also include symptom checker and diagnosis with integrated nurse triage and explaining lab results or providing directions on parking. What preconfigured use cases has your AI vendor developed and deployed with verifiable client references that also address your organization's cross-functional requirements?

> **EXAMPLE:** Ask your preferred AI vendor what preconfigured use cases they have available for rapid customization and deployment. Ask to see the deployments in a live environment with a verifiable client reference. Also, note how road mapping and strategy changes within your EHR partnership. As EHRs and the services they offer mature, they may offer similar experiences natively within their existing systems.

Variable, Consumption-Oriented Charges

While this may not come as a surprise, additional charges may apply beyond your initial monthly subscription. These charges should be considered when doing vendor comparisons, along with the potential cost of upgrading infrastructure and optimizing your preferred EHR environment. Take special note of any API-related charges that may surface between your EHR provider and third-party conversational AI partner to ensure charges are to be carried by the AI vendor and not your organization.

EXAMPLE: Many conversational AI vendors charge for IVR (voice) and SMS (text) consumption, while others also charge for the use of generative AI. Some AI vendors charge per minute (voice), whereas others charge per instance. Others may offer discounted prepaid bulk consumption coverage with rollover for unused capacity while others do not roll over or offer any prepaid discounts. While you are reviewing contract-related costs, be sure to also ask about additional charges for languages, support, maintenance, and training to improve operational recognition and accuracy.

Performance and Security

With the conversational AI landscape being actively navigated, there are a range of different contract-related nuances specific to how vendors make and offer performance guarantees in the form of product accuracy and recognition.

EXAMPLE: During preliminary discussions, be sure to ask about performance-related guarantees specific to product recognition accuracy and/or deflection driven by self-service use cases (MyChart password resets are a common example). While this topic may cause contract and legal delays, ensuring some level of accuracy is highly encouraged as the ability for the system to properly recognize and service the inbound inquiry will have a direct impact on long-term ROI and system adoption.

In terms of security, any conversational AI vendor supporting healthcare environments will have the necessary HIPAA compliance and security privacy requirements. More advanced vendors may also be seeking NIST certification and adopting security and governance practices that align with NIST. While some organizations may have existing capacity within their data analytics teams, resource forecasting beyond implementation is an area for consideration.

Finally, the topic of security, privacy, and legal liability is an item we encourage clients to investigate early with a preliminary review with an organization's internal security, compliance, contracting, and legal team. These discussions should also include operational resilience, data access, retention, use of language models, and separation of entities' voice and call transcripts, including the verifiable de-identification of patient data stored within the confines of the United States.

About the Author

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Kjrk Reyerson is a senior managing consultant at Tegria. He is responsible for digital investment portfolio and partnership strategy. Kjrk's experience in digital vendor analysis and recommendations has spanned provider, payer, and academic markets, where he has been responsible for selecting and managing software-related investments over $1 billion.

Kjrk is also a graduate school professor and teaches healthcare entrepreneurial innovation. He is a committee chair of the largest academic Future of Healthcare Conference in the Twin Cities and designed Chime's Future of Healthcare Technology graduate course curriculum.