# cxperts

# Turning Patient Conversations into Care & Access Intelligence

Healthcare Case study

# The Challenge

High call/chat volumes, complex coverage questions, and fragmented systems slowed time-to-therapy and created uneven experiences for patients and HCP offices. Sensitive conversations were handled without full context, and leaders could see KPIs shift without a clear "why."

**The symptoms behind the metrics**

- Coverage/benefits questions bouncing between teams.

- Prior-auth delays creating repeat contacts and frustration.

- Inconsistent guidance across channels (voice, chat, email, portal).

- Limited QA visibility (small samples, slow feedback loops)

# Our Approach

We paired brand-trained healthcare advisors with practical conversation intelligence to lift each step of the journey—without adding friction for patients or clinics.

1. **Align on outcomes** — time-to-therapy, first-contact resolution, abandonment, patient satisfaction.

2. **Wire the signals** — analyze 100% of conversations; connect CRM, eligibility/benefits, PA status, and consent flags into a single view.

3. **Coach in the moment** — on-screen guidance for sensitive topics, next-best steps, and compliance cues; weekly insight packs to Patient Access, CX Ops, and Training.

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# What We Built (in 6 weeks)

- **One patient/HCP view:** coverage, PA status, benefits checks, documentation, consent, and contact history on a single screen.

- **Live guidance & playbooks:** conversation prompts for empathy, policy, and escalation; checklists for PA, appeals, and benefit exceptions.

- **Automated QA (compliance + CX):** scorecards blending verification accuracy and empathy, with call clips for same-day coaching.

- **Proactive moments:** outreach on PA milestones, missing docs, expiring refills, and delay notifications.

- **Closed-loop insight:** conversation themes fed training, website FAQs, and PA documentation templates.

# Results
# First 90 days

- **Time-to-therapy** ↓**9%** (faster benefit checks and cleaner PA handoffs)

- **First-contact resolution** ↑**8 pts** (fewer re-routes, clearer playbooks)

- **CSAT** ↑**11 pts** (more consistent, empathetic guidance)

# By 6 months

- **Abandonment/drop-off** ↓**15% across access journeys**

- **Escalations** ↓**as decision authority and guidance improved**

- **Coaching efficiency** ↑ **(more time on action, less on scoring)**

> **"We moved from after-the-fact reporting to seeing where patients get stuck—and fixing it before it snowballs."**

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# Why It Worked

- **People first, tech that helps:** advisors lead; tooling removes friction.

- **Context at the point of need:** one view, fewer handoffs, cleaner make-right.

- **From samples to signals:** 100% coverage → precise coaching and earlier course-corrections.

- **Playbooks that stick:** live guidance, tight guardrails, weekly iteration.

# Program Snapshot

- **Channels:** voice, chat, email, SMS/WhatsApp, provider portals

- **Languages:** English + Spanish (expandable)

- **Coverage:** 24/5 core with 24/7 incident/launch support; elastic headcount for peaks

- **Security & Compliance:** HIPAA-aligned workflows; PHI handling protocols; SOC 2 / ISO 27001 controls; adverse-event routing and documentation

# What We Can Do Next (for you)

- **Launch a 30-day pilot** on one therapy line or access workflow

- Map your **top 5 friction points** from conversation signals

- Stand up **proactive milestones** (PA status/outreach, refill reminders)

- Roll out **auto-QA + coaching loops** for consistent quality

*Let's make access smoother—and care feel simpler.*

**Book a Strategy Call →**

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