ELEVATING CONVERSATIONAL CX IN HEALTHCARE

RESEARCH INSIGHTS

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Key Takeaways

Our latest research uncovers five key insights for the Future of Conversational CX in Healthcare:

1 in 3 view Conversational Commerce as part of healthcare.

HCPs that successfully initiate conversations, advise, engage and then close over multiple channels can potentially retain up to 7X more customers.

Messaging platforms are the most preferred communication medium for interacting with Healthcare brands.

93% of Gen Z customers

71% of Millennial customers

Conversational Intelligence empowers both front & back-office teams across the org.

4X more cost-efficient to focus on routine processes that support retention, like follow-ups/referrals.

79% of Healthcare customers prefer being engaged by chat rather than call.

Conversations create convenience convenience leads to conversion

90% of Healthcare customers prefer personalised interactions to static responses.

3 in 4 customers prefer to request information via intuitive conversational interfaces

It helps them search through knowledge bases faster and know about product features more easily.
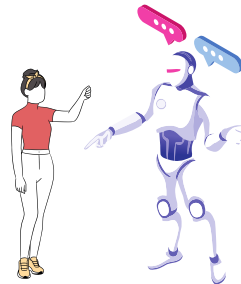
88% of HCPs believe CX drives consumer purchasing decisions.

Yet, only 42% of healthcare executives have deployed an advanced enterprise-wide CX strategy

Health consumers today demand low-cost solutions, personalized care, and timely health engagement outcomes. A growing mix of both large and mid-sized healthcare organisations have transitioned to 'Value-based Care' from the older 'Fee-For-Service' model.
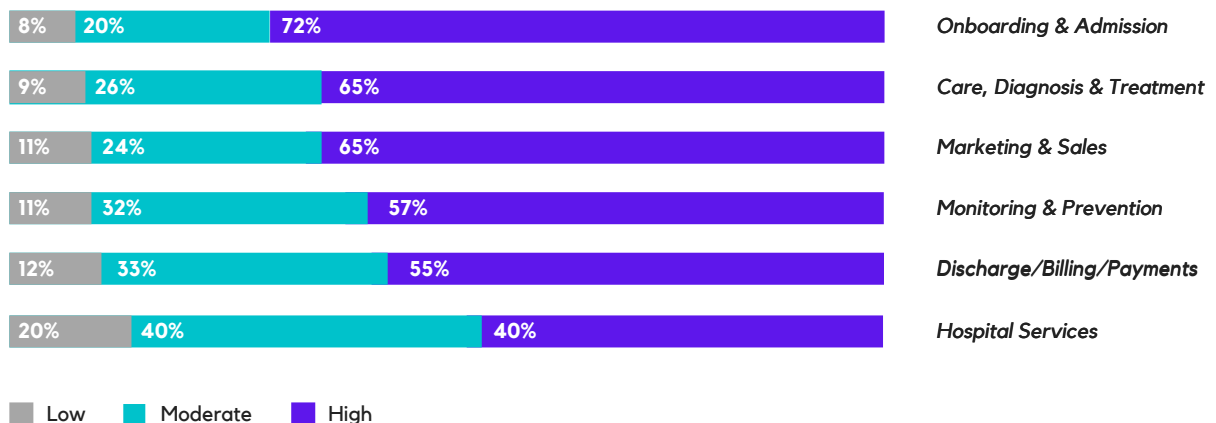
However, elevating CX remains a major concern due to lack of patient recorded information (via voice, email, text) and a 360-degree view of the consumer (aggregated from clean data sources) creating disjointed care experiences.

In the face of greater patient demand and overburdened legacy health systems, CX tools & solutions form a critical starting point for Providers to transform simple touchpoints into connected care experiences.

Figure 1

Value Chain areas that receive 'Experience Focus'

8%	20%	72%	Onboarding & Admission
9%	26%	65%	Care, Diagnosis & Treatment
11%	24%	65%	Marketing & Sales
11%	32%	57%	Monitoring & Prevention
12%	33%	55%	Discharge/Billing/Payments
20%	40%	40%	Hospital Services

Low　　Moderate　　High

What areas of the customer journey receives the most deployment of CX initiatives for your organisation?

Digital self-service receives the second highest share of CX investments

86% of HCPs feel self-service tools can bring in the most value to the front-line against future disruptions.

Switching to CX-based tools helps Providers scale up intelligent care delivery and enhance their patient-centric journeys. These allow Health CX decision-makers to measure what happens during the experience, how patients perceive the experience, and how they respond across the value chain.
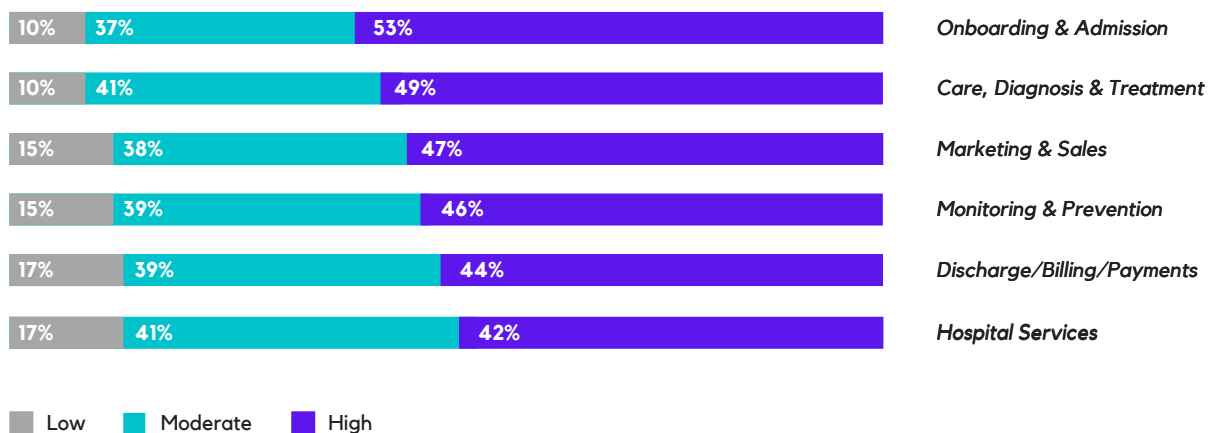
HCPs will need to harness self-service CX strategies for enabling an omnichannel relationship with health customers; learning insights from historical health data; and creating an enhanced patient view from this behavioural data to drive greater efficiencies.

Better self-service outcomes can boost customer satisfaction and net promoter scores — across existing and new business, for demand pools in OPD & IPD care.

Figure 2

Digital Self-Service levels across the Value Chain

10%	37%	53%	Onboarding & Admission
10%	41%	49%	Care, Diagnosis & Treatment
15%	38%	47%	Marketing & Sales
15%	39%	46%	Monitoring & Prevention
17%	39%	44%	Discharge/Billing/Payments
17%	41%	42%	Hospital Services

■ Low ■ Moderate ■ High

To what extent does your organisation deploy CX initiatives that addresses digital self-service across the customer journey?

Conversational CX moves up the pack among 'tactical investment strategies' for HCPs

Reliable EHR Data/Systems and Agile Cloud Computing are the main resilience-focused transformations

Conversational CX touches all parts of the patient's healthcare journey. It extends across the entire the value chain, not just the upfront admission & onboarding process.
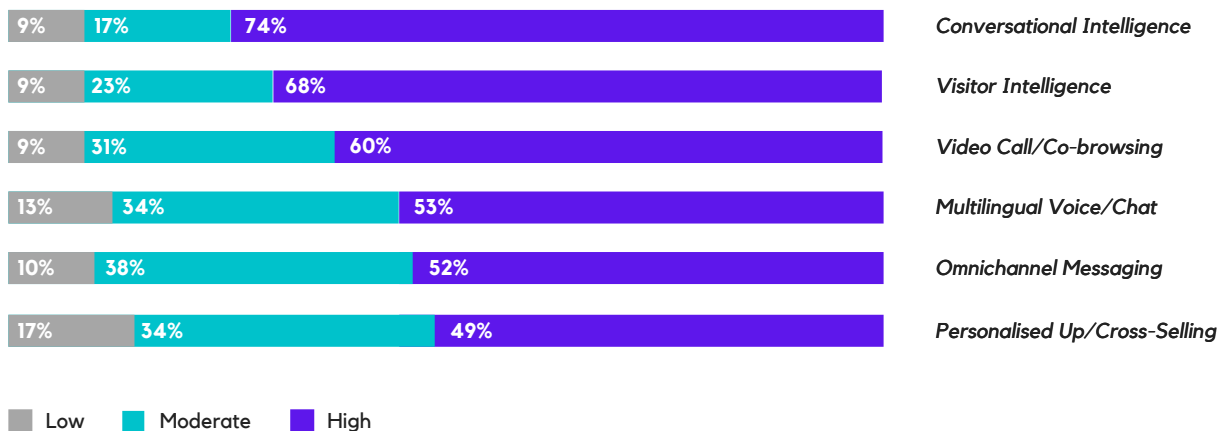
Over the next 12 months, more Conversational AI systems will be deployed to fill in operational gaps by providing faster triage and health guidance for patients.

HCPs can also utilize conversational commerce as part of a broader omnichannel strategy to promote specialties and service lines, improve patient engagement, minimize referral leakage, and influence revenue cycles.

This will propel healthcare providers to increase new acquisitions and boost channel confidence.

Figure 3

Tactical Investment Areas within Conversational CX

9%	17%	74%	Conversational Intelligence
9%	23%	68%	Visitor Intelligence
9%	31%	60%	Video Call/Co-browsing
13%	34%	53%	Multilingual Voice/Chat
10%	38%	52%	Omnichannel Messaging
17%	34%	49%	Personalised Up/Cross-Selling

■ Low ■ Moderate ■ High

To what extent does your organisation invest or plan to invest in the following Conversational CX capabilities?

Only 33% of healthcare executives actively prioritize retaining customers as more important than new business

Research shows customer retention is at least four times as cost-efficient as pursuing new business.

Patient acquisition expenses have been rising and are set to further go up between 35%-44% by 2024.

Instead of pursuing an omnichannel approach for retention, many HCPs continue to engage their patients primarily by call and traditional mail.
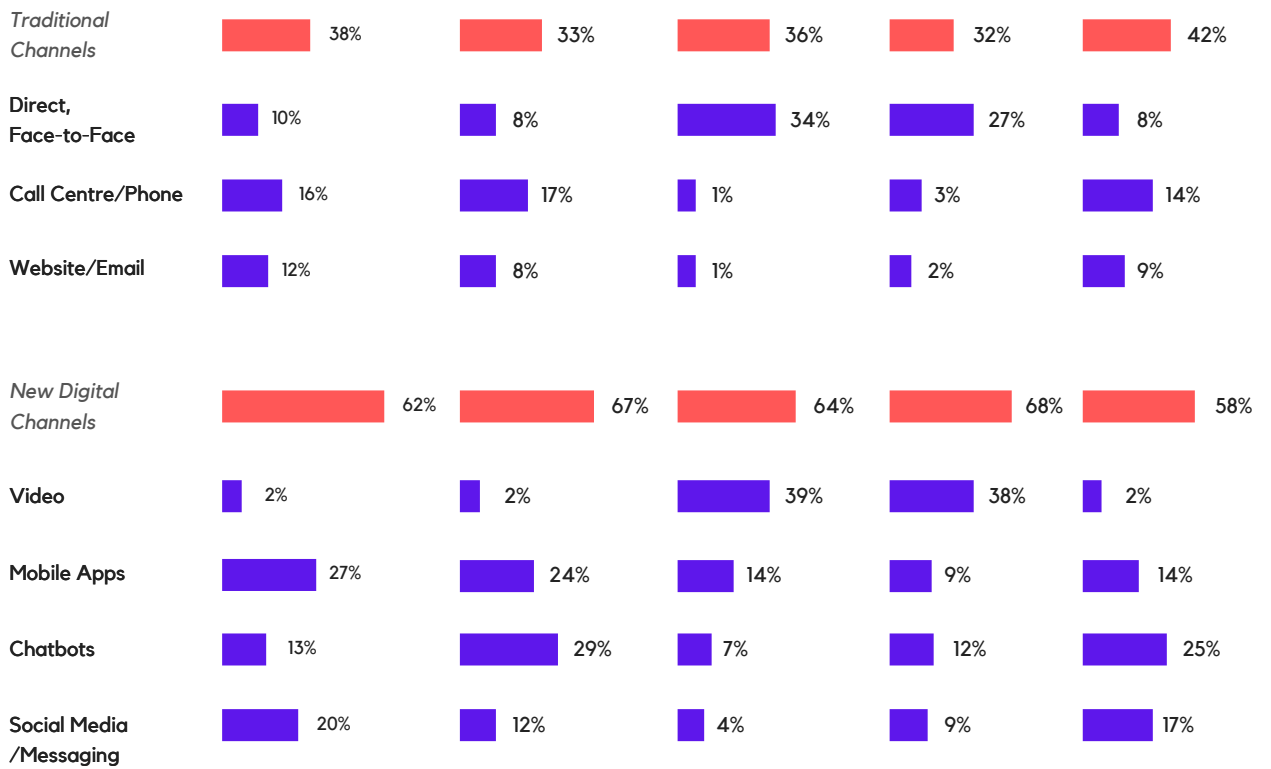
The latter is relatively expensive and makes seamless integration difficult, requiring several steps to digitize, analyze, and integrate communications.

Providers who prioritized CX before the pandemic have already gained an early advantage. Mature CX organizations are more than six times as likely to exceed their customer retention goals.

Investments in digital front-office transformation would better align HCPs with their patient's engagement needs and improve overall cost efficiencies.

46% of Millennial customers prefer social media as their primary mode of receiving healthcare advice.

The Patient Journey
Channel Preferences

	Health Awareness & Information	Appointment Booking	Physician Advice	Follow-Up/Referral Advice	Customer Service & Support

	Health Awareness & Information	Appointment Booking	Physician Advice	Follow-Up/Referral Advice	Customer Service & Support
Traditional Channels	38%	33%	36%	32%	42%
Direct, Face-to-Face	10%	8%	34%	27%	8%
Call Centre/Phone	16%	17%	1%	3%	14%
Website/Email	12%	8%	1%	2%	9%
New Digital Channels	62%	67%	64%	68%	58%
Video	2%	2%	39%	38%	2%
Mobile Apps	27%	24%	14%	9%	14%
Chatbots	13%	29%	7%	12%	25%
Social Media /Messaging	20%	12%	4%	9%	17%

What is your channel of choice, in the future, for the following healthcare stages — health awareness & information, health appointment booking, physician advice, follow-up/referral advice, and customer service related support/issue resolution?

Healthcare Consumers feel messaging platforms offer the most digital self-service convenience

56% of Providers view private messaging channels as the biggest disrupter over the next 12 months

93% of Gen Z, and 71% of Millennial customers say they would prefer to use conversational chatbots that offer 'convenient experiences' as their primary mode of interacting with a healthcare brand.

During the last twelve months, 63% of consumers have used a private messaging channel - such as Facebook Messenger, Twitter DM, WhatsApp, iMessage, SMS - to engage with a healthcare brand.

Enterprises with best-in class CX results are at least 1.5 times more likely to use messaging as the primary means of engaging customers, according to a ZenDesk report.

The volume of messages exchanged through social messenger apps has seen a 50% spike, in the last twelve months.

Clearly, messaging is the medium of choice for customers, but healthcare organizations have made slow progress to facilitate customer communication through these platforms.

On the other hand, Providers that do embrace digital messaging channels, have missed out on the conversational value of these platforms. In turn, 89% of customers who have bad experiences with virtual agents, are more than likely to stop engaging with that brand.

Providers, will need to embrace **conversational design** in order to raise their competitive bar, and recapture lost opportunities.

Scaling CX with Conversational AI Platforms

Convenience leads to conversation. That's the *whole* point.

From admission to discharge, and every touchpoint in between - Conversational AI enables the Intelligent Healthcare enterprise. Mantra's four guiding principles for creating Conversational CX:

Conversate

Chatbots are perfect augments to human support, and can bring 1:1 communications to scale.

Customers hate being made to repeat themselves to multiple agents for the same issue. Instead, being able to engage in a human-like back-and-forth exchange increases the likelihood of completing a purchase by as much as 45%.

Combining NLP with self-learning models and large training sets can help imitate human interactions, recognize speech & text inputs, and translate meanings into any local vernacular.

Channelise

A deeper omnichannel messaging approach should always bring responsive support first to the customer, i.e., finding the customer before they look for you.

60% of repetitive queries across all messaging platforms can be automated, and reduces time to response by 95%.

Providers can optimize support staffing costs by front-lining their bots through intelligent self-service automation.

86% of Gen Z customers feel comfortable talking to a physician via video for advice or second opinion.

A Superior Conversational support model can win you 3X more customers with 35% more cost-efficiency

Contextualise

Providers handle at least 7X more data than they did five years before.

To capture context from this data is crucial for transforming simple interactions into natural conversations that bring out winning outcomes.

Customers, especially value being able to pick up with a Provider where they left off, and appreciate when that Provider recognizes that it's dealt with them before.
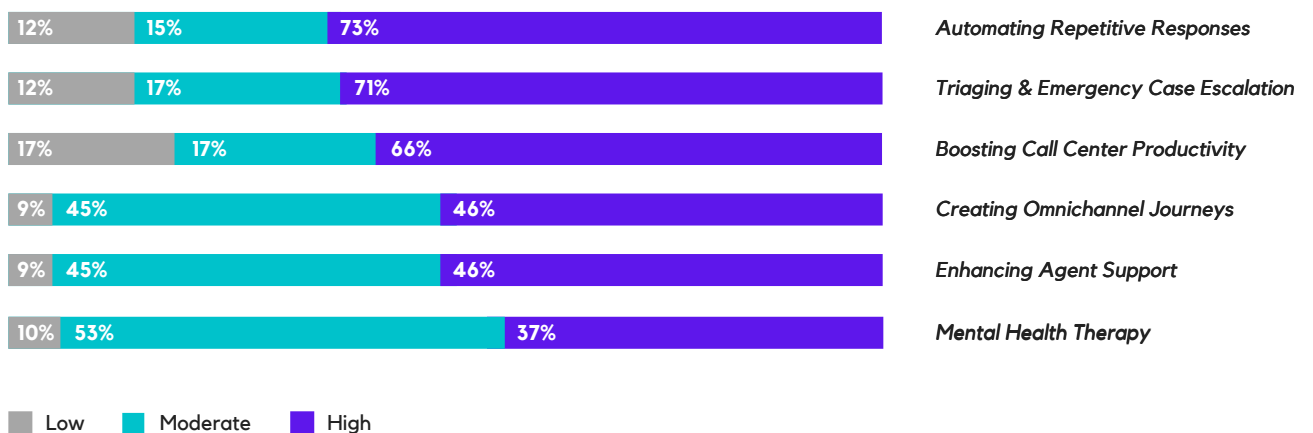
Customise

Conversational AI enables personalisation through NLP processing speed, machine learning models and data availability.

AI brings the added ability to leverage predictive real-time, actionable insights for driving intelligent customer engagement.

A proactive approach to tailoring the customer's journey means your teams spends less time channel planning and more in audience planning.

Figure 4

Priority Use Cases for Conversational AI

12%	15%	73%	Automating Repetitive Responses
12%	17%	71%	Triaging & Emergency Case Escalation
17%	17%	66%	Boosting Call Center Productivity
9%	45%	46%	Creating Omnichannel Journeys
9%	45%	46%	Enhancing Agent Support
10%	53%	37%	Mental Health Therapy

■ Low   ■ Moderate   ■ High

To what extent does your organisation deploy CX initiatives that addresses the following applications of Conversational AI?

MANTRA LABS RESEARCH INSIGHTS

AI-aided Super Agents can 'engage to win' customers with 63% more success

57% of Agents rate collaboration tools with real-time video & audio capabilities as a critical sales-conversation enabler

Though AI saw adoption rates jump 51% in 2021, usage rates remain low. This gap presents an opportunity for businesses to make AI a better partner to agents.

Conversational AI remains an underutilized tool, despite the adoption boost, among larger healthcare providers. Only 30% of contact center agents believe they have tools to succeed in a post-pandemic world.
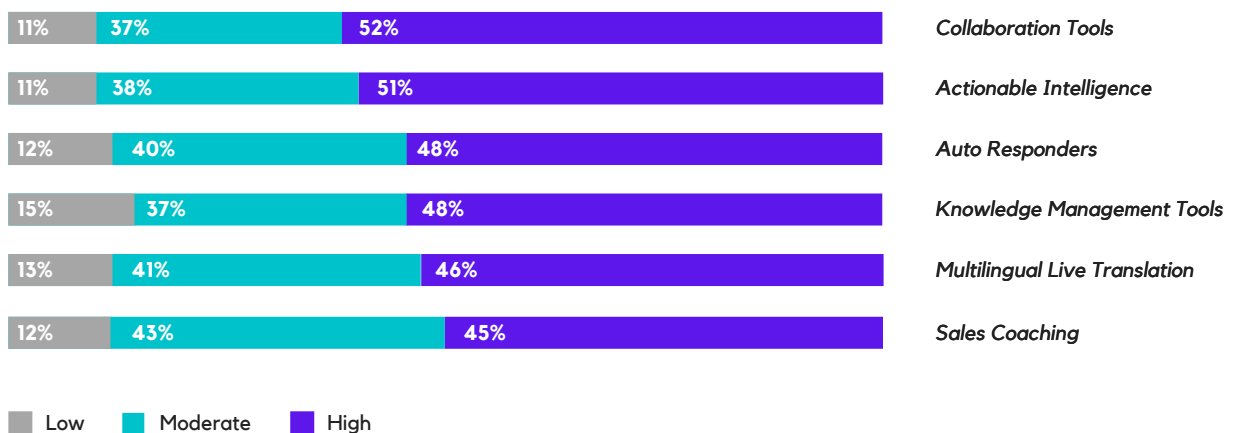
High-performing teams across other industries are 93% more likely to have agents working across multiple channels, and have three times more agents doing so.

Agents empowered by AI can increase productivity and boost sales performance with contextual insights — like the customer's email, appointment history, or why they last reached out.

Figure 5

Enabling Agents with Conversational AI

11%	37%	52%	Collaboration Tools
11%	38%	51%	Actionable Intelligence
12%	40%	48%	Auto Responders
15%	37%	48%	Knowledge Management Tools
13%	41%	46%	Multilingual Live Translation
12%	43%	45%	Sales Coaching

Low ■ Moderate ■ High

To what extent does your organisation deploy CX initiatives that enhances Agent productivity specifically enabled by Conversational CX?

MANTRA LABS RESEARCH INSIGHTS

Four Steps to a Conversational CX-driven Healthcare Enterprise

- **Identify data sources, pipeline, security & privacy concerns**

  Leverage in-house data first to set the foundational base for an open data platform and governance that supports customer-centric analytics. This will enable HCPs to pilot use cases in isolation along the business value chain to extend capabilities.

- **Explore setting up CX-supporting systems**

  Most HCPs get stuck in an endless loop of proof-of-concepts or off-the-shelf tools, but do not move towards transforming how they operate or how their patients perceive them. Setting up a supporting system first, like a customer analytics platform, allows HCPs to utilise a data-driven approach to Conversational CX.

- **Optimise & build around digital customers & agents first**

  Consider the business problems you're trying to solve for, and how replacing or opening up new channels can solve operational challenges. HCPs can effectively learn from interactions, to allow contextual conversations to happen where the patient is.

- **Scale & evolve value-based care to the patient's door**

  Adapt Conversational CX across business units that allows Providers to be less siloed-working and more synchronised. Build relevance in your interactions through contextual engagement based on the patient's life stage needs, matched to on-demand products and experiences.

Research Methodology

To better understand the CX pulse of the industry, Mantra Labs interviewed 150 healthcare executives in six countries within the APAC region regarding their CX initiatives and corresponding key performance indicators (KPIs). We augmented this data with a survey of more than 300 healthcare consumers to hear their side of the story.

Both surveys were conducted in Q4'21, and reflect the specific experiences in these times. In this whitepaper, we discuss how healthcare CX initiatives stack up against their customer's expectations. Then, we highlight areas of interest and make suggestions for the way forward.

Share of consumers by age group

25%	Gen X
38%	Gen Y
37%	Gen Z

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Mantra Labs is also a recognized InsurTech100 company deeply involved in developing technology solutions for business-specific problems with several strategic technology partnerships including MongoDB, IBM Watson and Nvidia.

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