



## IMPROVING CX FROM THE FIRST TOUCH:

# Real Patient Care Starts Before the Appointment



Make early impressions count with AI that empowers authentic, personal care.

**E**  **ERISE**



## EXECUTIVE SUMMARY

### The Critical Encounter: Defining Patient Experience from the First Call

In healthcare, the patient experience begins long before the clinical encounter. From the moment an appointment is scheduled through a call, portal, or chat, these interactions already shape the patient's perception of care. During these early moments, even a single friction can erode trust, delay treatment, and push patients toward competitors who deliver faster, more seamless access.

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**As expectations rise and patient needs become more complex, many health systems still struggle with common pain points.**



outdated  
processes



long  
wait times



overburdened  
staff

**These gaps hinder providers from meeting expectations, driving no-shows, lower patient satisfaction, and reduced engagement.**

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Personalization is what makes care feel human, and AI empowers frontline teams to deliver it at scale. When healthcare organizations optimize these early interactions, they transform the patient journey. The impact extends far beyond the first contact, strengthening trust, boosting engagement, and improving outcomes across the entire continuum of care.



## When the First Touch Fails

Every patient seeks genuine support while managing their health concerns. Before they even see a clinician, patients already form judgments about their care experience the moment they reach the front desk.

But the system often fails to meet those expectations. Since 2022, 61% of patients have skipped medical appointments<sup>1</sup> due to scheduling errors and long queues. When these failures accumulate, patients feel ignored and delay or avoid treatment.

The result is widespread patient disengagement. As of 2025, 73% of medical groups<sup>2</sup> report no improvement in no-show rates, and patients still wait an average of 38 days<sup>3</sup> to get an appointment across 11 major U.S. cities. While these gaps seem minor, they cost the healthcare systems an estimated \$150 billion annually<sup>4</sup>.

The numbers reveal a clear pattern. First-touch contact has now become integral to patient retention and care quality.

**61%**

Patients have skipped medical appointments as of 2022

**73%**

Medical groups report no improvement in no-show rates as of 2025

**38 days**

Average wait times for the third next available appointment

**\$150B**

Lost annually to missed appointments

## Inefficient Processes Multiply Costs

Over  
**50%**

Hospitals still rely on legacy software for core operations

**30%**

Administrative budgets lost to manual processes

Across industries, **88% of organizations are using AI<sup>5</sup>** to boost staff efficiency. Yet over half of hospitals<sup>6</sup> still rely on legacy software for core operations, increasing errors and delays that cause patients to miss their appointments.

Beyond driving patient churn, using suboptimal technology also creates an inefficiency burden.

**By manually processing 10,000–15,000 documents with 5%–8% error rates<sup>7</sup>**, providers drive up operational overhead and consume up to 30% of administrative budgets<sup>7</sup>.

**While over 180 hospitals<sup>8</sup> have upgraded to modern platforms to streamline routine tasks, smaller organizations still fall behind modernization.** In turn, this delay creates a vicious cycle of rising costs. Existing systems generate inefficiencies, which lead to errors and rework, ultimately increasing expenses.

Limited workforce capacity is intensifying these costs. As of 2024, registered nurses handling first-contact tasks cost twice the wages of non-clinical staff<sup>9</sup> (see Figure 1). This diverts clinical teams from care delivery and exposes them to burnout risk.

Global hospital expansion<sup>10</sup> offers a solution, connecting 1.67 million medical devices by 2029<sup>11</sup> to optimize health monitoring and free up staff capacity. But return on investment (ROI) timelines take several years, while operational gaps need solutions now.

At the same time, this expansion introduces new risks. As devices integrate with aging systems, **63% of security gaps occur in hospitals<sup>12</sup>**, and **medical devices account for 23%<sup>12</sup>**, putting revenue, company reputation, and patient data at stake.

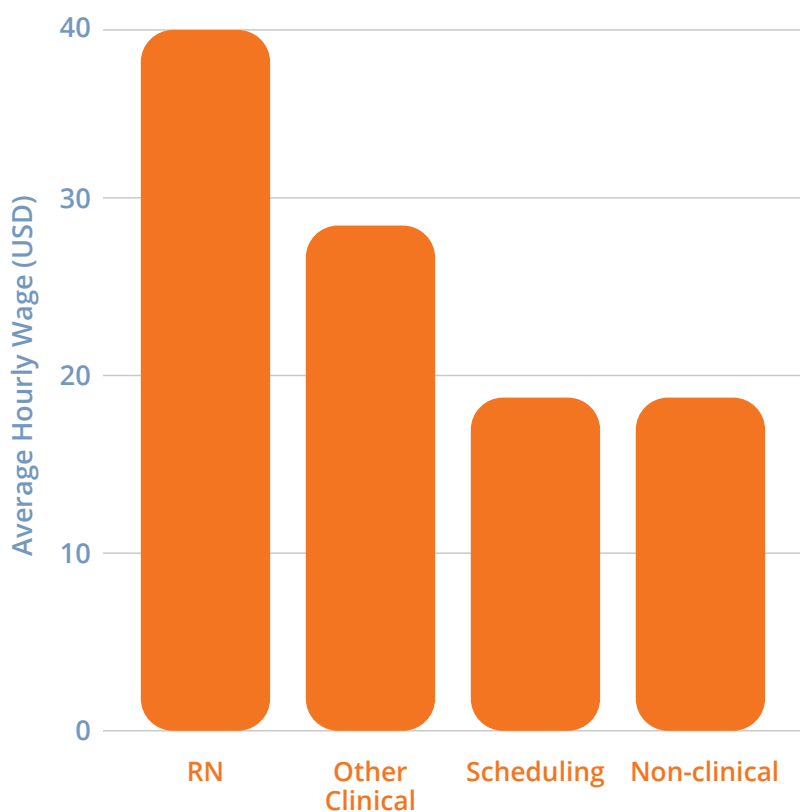


Figure 1: Average hourly wages by role (HCCT 2024)

## Patients Skip Care When Service Fails

Success is no longer measured by clinical outcomes, but by smooth patient transitions across touchpoints. Yet providers fail to deliver on this standard. A recent CMS survey<sup>13</sup> found that poor communication, long queues, and scheduling hassles remain the top patient complaints.

These frustrations stem from fragmented systems that create friction across the patient journey. With 92% of patients preferring online scheduling<sup>14</sup> and 48% willing to switch to competitors who offer it<sup>14</sup>, limited digital access has become a major driver of patient attrition.

However, system upgrades without technical expertise and seamless integration bring more risks than value. With nearly 60% of patients seeking tailored guidance on their health plans<sup>14</sup>, digital tools must be paired with trained non-clinical staff who provide personalized support.



**92%**  
Patients prefer online scheduling



**48%**  
Patients will change providers for easier scheduling



**~60%**  
Patients seek tailored guidance on health plans

## Fragmented Access Erodes Trust and Equity

Data silos disrupt information exchange, slowing clinical coordination and medical record transfers while negatively impacting patients with serious illnesses.

As healthcare becomes more digital, **patients with life-threatening conditions expect seamless access to their health data**<sup>15</sup>.

However, inconsistent experiences across portals and apps make engagement difficult, reducing patient trust and care participation.

Although **48% of health systems have already unified their scheduling platforms**<sup>9</sup>, many still use multiple contact numbers. This decentralized system confuses patients, reducing satisfaction and compromising safety as they receive different answers with each call.

These digital inconsistencies also carry into analytics. Training algorithms on biased data widens engagement gaps, disproportionately affecting **minorities already facing systemic barriers in portals**<sup>16</sup>. Without addressing underlying issues, modernization risks deepening disparities for vulnerable groups.



## Recognition Gap Affects Morale

As of 2024, over 90% of call center leaders feel like their work is important to the organization, however only 36% of executive leadership think they hold a very important role<sup>9</sup>. This reflects a clear disparity between work and recognition, which is a huge driver for job dissatisfaction and a disengaged workforce.

Recent surveys support this, showing a clear link between an **engaged workforce and higher patient satisfaction**<sup>17</sup>. In fact, patients are more likely to refer physicians and hospitals that demonstrate strong collaboration skills. So, when leadership overlooks first-touch support, it lowers morale, reduces productivity, and ultimately undermines the overall patient experience.

**2024**



**Over 90%**

Call center leaders feel their work is important to the organization



**Only 36%**

Executive leaders think call centers play a very important role





# Make Lasting Impressions with Patient-Centric Care

Patient-centric care means delivering frontline excellence. By leveraging AI automation, staff can prioritize humanizing patient interactions while streamlining staff coordination to boost patient loyalty and operational efficiency. Below are key strategies for providers to make first impressions count.

## Optimize Workflows to Reduce Costs



**Automated scheduling drives high-accuracy, seamless booking that boosts patient satisfaction.**

By matching clinician availability with patient demand, automated scheduling cuts errors at scale while reducing overhead costs and protecting revenue.



**AI streamlines repetitive tasks by reducing manual work and operational costs.**

This frees up staff's time, helping prevent burnout and reducing reliance on overtime.



**Rightshoring and hybrid outsourcing models optimize role placement to improve efficiency and reduce costs.**

By matching roles to the right global talent, providers can improve response times and deliver quality support at a sustainable cost.



**AI-driven security minimizes costly disruptions and prevents breach-related penalties.**

Automated monitoring detects threats early, reducing downtime, avoiding regulatory fines, and protecting sensitive patient data.

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## Reduce No-Shows to Drive Care Continuity

**Modern contact centers enable frictionless booking, unifying platforms for seamless scheduling.**

With AI-powered eligibility checks, providers reduce frictions and complexities that cause patients to miss appointments.

**Timely, data-driven insights allow teams to provide faster, smarter guidance.**

Predictive analytics identifies patterns in missed appointments, while real-time alerts flag at-risk patients, so frontline staff can reach out, reschedule, and prevent missed visits.

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## Simplify Access to Drive Trust and Equity

**Support teams with access to patient health records drive stronger patient engagement.**

Leveraging omnichannel CX offers a 360-view of health records, enabling faster responses and seamless experiences during health crises. Meanwhile, AI call enhancements ensure call clarity, improving communication and patient experience

**Multi-geography, bilingual teams bridge cultural and linguistic barriers.**

AI-powered translations and transcriptions transcend accent differences to strengthen communication and build rapport, while inclusive practices reinforce ethical care to strengthen patient trust and safety.

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## Put People First to Deliver Better Care

**With many frontline leaders feeling unseen by executives, embracing a people-first culture shifts staff mindset.**

Championing a culture of fairness and inclusivity attracts and retains diverse talent, empowering support teams to deliver higher-value interactions.

**Empathy starts from within.**

When leaders care for the people in their organizations, it builds a culture of empathy, influencing the quality of support provided by first-touch teams. AI-assisted simulation training reinforces this, preparing staff for real-life scenarios without consequences, ensuring agent-readiness before the first call.

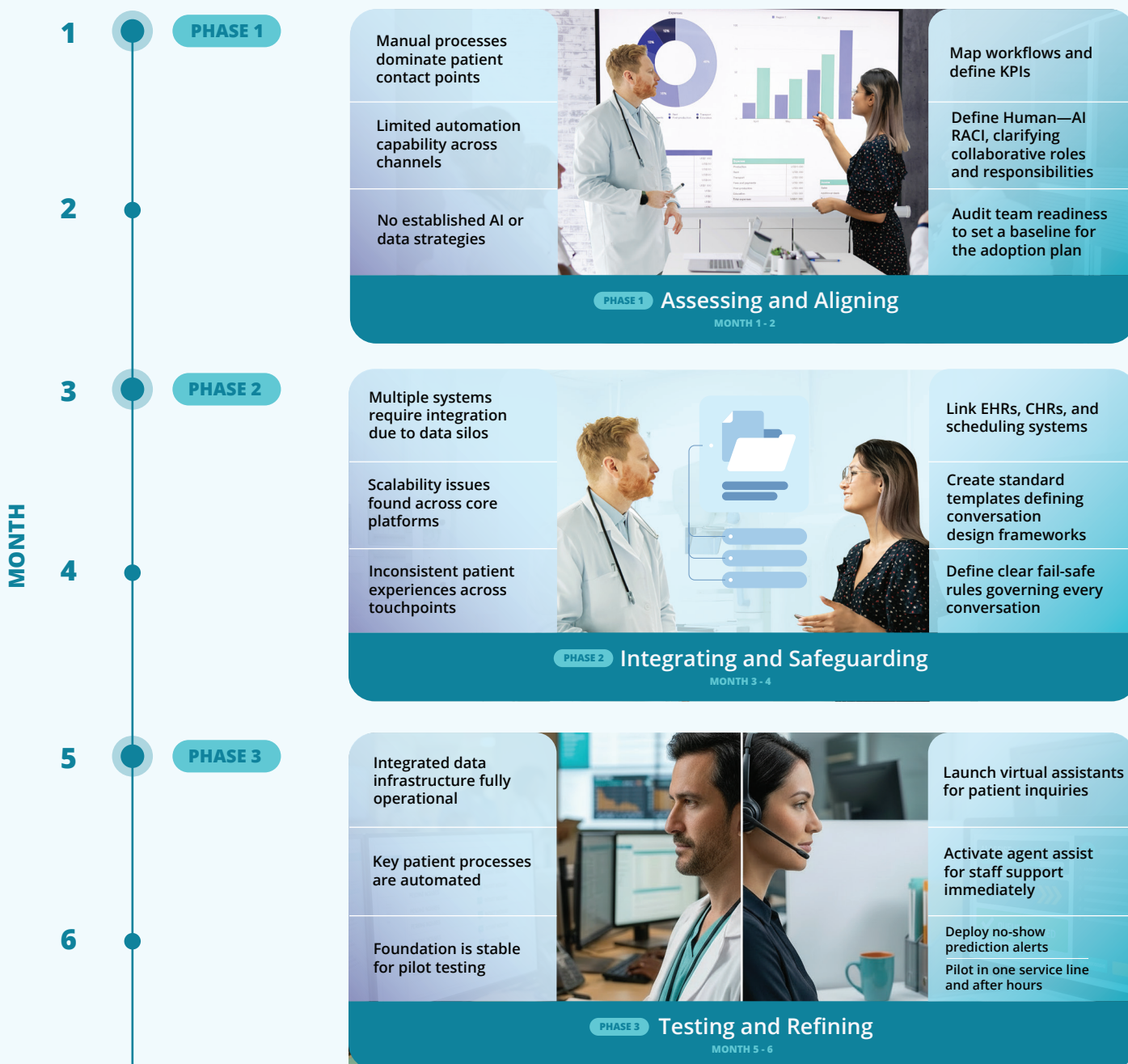
**Continuous skill development strengthens frontline support teams beyond onboarding.**

Targeted feedback helps staff improve performance immediately, and when employees feel valued, retention, engagement, and productivity rise.

# A Roadmap to Scaling Compassionate Care with AI

In healthcare, AI innovation and human collaboration should work together to drive frontline excellence. To succeed, healthcare organizations must evaluate their current state, set clear goals, train teams, and execute updates.

The table below charts a phased approach for assessing and implementing AI to amplify patient care.



7

## PHASE 4

Systems fully integrated  
across all platforms

Real-time data visibility  
for agents

Automated alerts for  
appointment reminders



Conduct empathy  
and de-escalation skills  
training

Complete proficiency,  
privacy, and bias  
awareness training

Educate patients  
concerning all new  
digital workflows

## PHASE 4 Training and Transforming

MONTH 7 - 9

8

9

10

## PHASE 5

AI + human expertise  
synchronize operations  
and CX

Seamless omnichannel  
experience

Hyper-personalization  
guides decisions

Real-time decision  
making for optimal  
service



Scale staffing with  
patient demand  
forecasts

Update SOPs and QA  
rubrics to standardize  
deployment

Monitor real-time  
decision-making for  
continuous learning

Expand  
hyper-personalization  
across all touchpoints

## PHASE 5 Scaling and Standardizing

MONTH 10+

11

12

## PHASE 6

13

14

PHASE 6  
Optimizing

Deployment is just the start. Continuous optimization through quarterly reviews, A/B testing, and regular updates are key to aligning human expertise and modern technology with user needs.

Overall, the goal is to create a seamless human and AI collaboration that amplifies compassionate patient experiences (see Figure 2).

## Human-AI Collaboration Complementary Strengths

### WHAT AI DOES BEST



Intake and triage with natural language understanding to route calls and chats



Self-service scheduling and rescheduling with rules-aware templates



Proactive reminders and pre-visit orchestration across SMS, email, voice



Eligibility and registration pre-capture with automated checks and flags

Agent assist: Instant knowledge retrieval

### WHAT PEOPLE DO BEST (NON-CLINICAL SUPERPOWERS)



Empathy, reassurance, and de-escalation in anxious or complex situations



Complex coordination across services and modalities including special needs



Judgement on exceptions: insurance nuances, prior authorizations, and barriers to care



Quality assurance and relationship continuity across departments

### SHARED RESPONSIBILITIES ACROSS THE PATIENT JOURNEY

**Discovery & Access:** AI answers FAQs and proposes slots; Agents advise on modality and expectations

**Registration & Financial Readiness:** AI pre-captures data and flags conflicts; Agents resolve discrepancies and explain benefits

**Pre-Visit Orchestration:** AI sends prep and dynamic reminders. Agents intervene on risk flags and remove barriers

**Day-of & Post-Visit:** AI handles wayfinding and surveys. Agents deliver service recovery and schedule follow-ups

Figure 2: Human-AI collaboration



## The Force Multiplier for Human-First Care

By identifying key areas of improvement in their operations, providers can strategically implement AI-enabled enhancements while maintaining the human touch that patients value.

A woman with short dark hair and glasses is shown in profile, looking at a futuristic digital interface. Her hand is hovering over a glowing blue circular element on the screen. The background is a dark blue with various digital data visualizations, including bar charts and line graphs, all rendered in a light blue color. The overall aesthetic is high-tech and modern.

**EverAI is a state-of-the-art suite of AI tools that combines AI efficiency with human oversight.**

**Each solution transforms early interactions into seamless, positive patient experiences by automating routine work, assisting agents in real time, and simplifying coordination across the care journey. Through accelerated hiring lifecycles, tailored coaching, and live call enhancements,**

EverAI also helps providers boost employee retention, engagement, and productivity. This empowers champions to deliver high-touch interactions that drive stronger patient loyalty and satisfaction.

By combining EverAI's speed and accuracy with patient-centered CX teams, providers can deliver faster, more reliable support that strengthens trust from the very start.



## CONCLUSION

### Turn Every Interaction into A Memorable Experience

Healthcare is now becoming increasingly customer-driven as patients demand seamless, personalized experiences. Delivering empathetic, accurate, and accessible care preserves trust and loyalty, while enabling providers to stand out through exceptional patient experiences.

To deliver on those experiences, healthcare organizations need to equip non-clinical support teams with AI tools and training. When they leverage digital-first solutions, providers can deliver faster, high-quality care, protect workforce capacity, and reduce burnout risks. This support strengthens frontline performance and elevates patient satisfaction at critical early touchpoints.

**The first interaction defines the patient journey. Getting it right means delivering accurate, empathetic, and equitable care at every touchpoint.**

**Let's transform patient experiences through human expertise and AI-powered systems.**

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## About Everise

Everise partners with healthcare providers to deliver human-first care that builds patient trust and drives engagement.

With over 15 years of experience, Everise is a leading healthcare partner that helps organizations simplify first-contact interactions, streamline appointments, and reduce operational costs and workflow barriers. By training empathetic champions on AI-powered tools, Everise ensures smoother, more compassionate experiences that lower patient no-shows and promote equitable access. Its smart solutions deliver personalized, seamless experiences that enhance every step of the patient journey.

To learn more, visit [www.weareeverise.com](http://www.weareeverise.com) or contact us at [sales@weareeverise.com](mailto:sales@weareeverise.com).