



## Creating a new model of care to enhance the patient experience.

### Use case

Support & Service

### Industry

Healthcare  
& Life Sciences

### Integrations

N/A

### Key metric

↑ Average rate  
↑ Answer wait time  
↑ Call distribution

A year into the pandemic, the world looked different for many people than it did before. It was a wild time to transition into healthcare technology, but that's just what I did.

I'd worked for several years as a founder in the fintech space, and when I started interviewing at healthtech companies, one stood out: [Carbon Health](#). Carbon Health combines smart technology with modern clinics to deliver a seamless experience for virtual and in-person

appointments, primary care, urgent care, and mental healthcare. Their VP of Product had been an angel investor in my last company and encouraged me to join Carbon. Until then, I'd spent a lot of my working life building surface-level apps to help people do things more efficiently, and I was at a point where I wanted to work for a company with a larger mission. When I met with the CEO and COO at Carbon, I fell in love with the team and its mission: to make good health accessible to everyone. I knew this was where I wanted to spend my time.

## The pandemic pushed us to the brink.

I joined the company as Director of Product for the productivity team, building the internal tooling related to scaling and growing our operations. That includes everything from customer support software to workflows between clinics. I came onto the scene as the pandemic caused a surge in customer demand, and scaling to meet that demand wasn't going to be easy.

Carbon Health experienced a massive influx of patients coming to us for help with COVID tests, vaccines, and travel clearances. That's free customer acquisition, which

is great for business, but it also meant our clinics were becoming overwhelmed. Our phones blew up. Overnight we went from 3,000 calls to 18,000 calls per day—a 500% increase. These people needed answers, but our clinics couldn't keep up with such high call volumes. They were busy helping the patients who were on site.

Unfortunately, we used antiquated software for all incoming patient support calls. That legacy software limited what we could automate. We have a complex setup, and we work with many clinics. Patients would

call their clinic first, and if the clinic didn't answer, the call would roll over to our central support. We wanted the opposite: to push as many tasks as possible to a centralized support team first, rather than bogging down clinics with those calls. The goal was to build a scalable support platform that would reduce support costs, help teams become more efficient, address omnichannel requests, and improve provider satisfaction.

## A solution that puts innovation front and center.

This goal drove us to seek out new contact center software. Among five or six other vendors we evaluated, Talkdesk stood out on the strength of its software based on the 70 or so features we evaluated. Some incumbents in the contact center software space have been around for 15 or 20 years. Even though Talkdesk was newer to the market, we felt that those incumbents leaned heavily on their account management and support more than their software. On the other hand, Talkdesk wanted to show off their features and the continuous evolution of their software, which included open APIs.

**We were looking for a solution to help us scale our support operations for the long term. We're a self-serve, fast-moving team. We became convinced that Talkdesk was the only solution that could keep that pace.**

In Talkdesk, we found a partner that would develop with us as we grew, and quickly.

## Addressing unique personas and workflows.

A person sitting at the front desk of a clinic has different needs than someone sitting in the back office, who has different needs from a call agent or a nurse working at our call center. During implementation, Talkdesk was flexible and worked with us to support these various personas.

**Back-office phone lines don't require full-fledged contact center software, but additional solutions require integrations. Instead, Talkdesk Phone fills that gap.**



**Centralizing support is paramount to free up clinic time and improve the overall patient experience.**



The flexibility to solve our unique problem was also crucial in mapping out our complex workflows. We wanted to ensure that patients would be routed to the right team member at the central support site when they called an individual clinic. The appropriate routing of patients is important because of how different healthcare is from other retail-based setups. If you call Home Depot, for example, it doesn't matter if you're a new or existing customer; for the most part, every new call refers to a new issue. But in healthcare, there is an added element of gathering data over time. It matters if a patient hasn't seen us in a year, if they've had multiple visits, or if they have future appointments.

We provided Talkdesk with 15 pages of workflows, showing how they all connected. They told us they'd never had a customer do all that work before, but it allowed them to see what they had to work with and not waste any time creating a solution. I think that's part of the reason why we were able to move so quickly. The timeline from when we first started evaluating vendors to when we went live with our first clinic was just over three months. From the moment we kicked off with the Talkdesk partner solutions team to going live with a clinic was only three to four weeks.

Our priority right now is getting Talkdesk live in our 100+ clinics. Part of that involves the use of [Talkdesk Phone](#) for their hardline phone needs. Doctors need to call patients, pharmacies need to call the clinics, and occasionally, clinics need to call emergency services. These back-office phone lines don't require full-fledged contact center software, but we didn't want to implement another solution and depend on integrations. Instead, Talkdesk Phone works for our needs and fills that gap.

## Better service and accessibility with AI and APIs.

Once all of our clinics have fully implemented Talkdesk, our priority will shift to utilize more of the Talkdesk AI solutions, including Talkdesk Virtual Agent. These AI solutions will help train the system to respond to the individual caller, ultimately building a differentiated patient experience.



### AI solutions help train systems to respond to an individual caller, ultimately building a differentiated patient experience.

If a patient with an upcoming appointment calls a clinic, we can ask right away if they want to change that appointment. If their answer is yes, we can make those changes without requiring them to speak to a human—meaning they don't have to wait on hold. Increased AI intelligence helps us create a personalized phone experience. We wanted to empower our patients to leverage AI for self-service and quick responses, without having to call into the call center or clinic. With the Virtual assistant as our first point of contact, callers don't have to wait half an hour on hold to learn the answer to a simple question, such as the price of a COVID test. Likewise, if a caller doesn't want to talk to a Virtual Agent or has a more complex issue, they're always one step away from talking to a human. The Talkdesk AI portfolio will allow us to have a personalized conversation with our patients if they are unable to accomplish their needs via self-service.

Another reason Talkdesk was attractive to us was their use of open APIs, which we plan to build on top of. When we think about the patient experience, it's not just about the patient getting care, but everything else that happens around that, such as obtaining medical records, getting a referral, or submitting a consent form for my child. For many of these workflows, the traditional model involves your doctor's office and following a manual procedure. What if, instead of needing to call a primary doctor to submit a prescription refill request, a patient could call our central support system, which will automatically ask if they want a refill? If the answer is yes, we will create a ticket and get a response within a few hours—no back and forth necessary with the doctor's office.

Phones are a big part of the healthcare experience. Using APIs to create delightful phone experiences increases accessibility for senior citizens and people who don't have access to technology or feel uncomfortable using an app.



### Using APIs to create delightful phone experiences increases accessibility for people who don't have access to or are uncomfortable with technology.

## Better call distribution means a lower burden for clinics.

By intelligently rebuilding our call trees and filtering people to the appropriate call center team, patients now get their questions answered without bogging down the wrong phone lines. That improves the patient experience and is a big help for the clinics, too.

Our clinic answer rate has jumped from 50% to 70% on average because of the reduced volume of calls they receive. We've also seen some clinics reach a 100% answer rate for the first time. **With the added benefit of the Talkdesk contact center platform, more patients are getting their calls answered, wait times are down, and the calls are better distributed between the central system and the clinics.**

We can also make changes for all clinics from one location. We could never build a scalable system when we had to manually update information for each clinic. Talkdesk gives us the speed to make these changes quickly, shortening the time to impact.



## Build or buy? For us, the answer was clear.

Every company will run into the question of whether they should build a central support platform on their own or build onto someone else's. Carbon Health would need to hire an entire team to build a platform for the call volume and features that we need, and who has the time or money for that? Instead, we got great value from implementing Talkdesk.

I'm excited to watch them build more software that solves even more of our support circumstances as they evolve. As we grow together, we will continue to work toward serving our clinics and healthcare providers as best we can, ultimately leading to a greater patient experience.

### About Talkdesk

Talkdesk® is a global AI-powered cloud contact center leader for enterprises of all sizes. Talkdesk CX Cloud and Industry Experience Clouds help enterprises deliver modern customer service their way. Our trusted, flexible, and innovative contact center platform leverages AI and automation to drive exceptional outcomes for their customers and improve the bottom line.

[Learn more](#) and take a [self-guided demo](#) at [www.talkdesk.com](http://www.talkdesk.com).

**talkdesk®**

Experience. A better way.

[Customer stories:](#)  
[Carbon Health](#)

