

# HCCCT

Healthcare Contact Center Times

MARCH 2024

## Learn How Mayo Clinic in Rochester Trains Contact Center Agents

**Conference Program**

**Discover How Renown Health's Training  
Program Boosts Contact Center Efficiency  
and Employee Retention**

**How BJC HealthCare Expanded to a  
Centralized Contact Center to  
Enhance Patient Care**





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**EDITORIAL GUIDELINES**

Manuscripts on topics, issues and programs relating to Healthcare Contact Center Times are welcome and may be submitted to the editor for consideration. Photographs, ads, brochures, charts, and graphs should be included where appropriate.

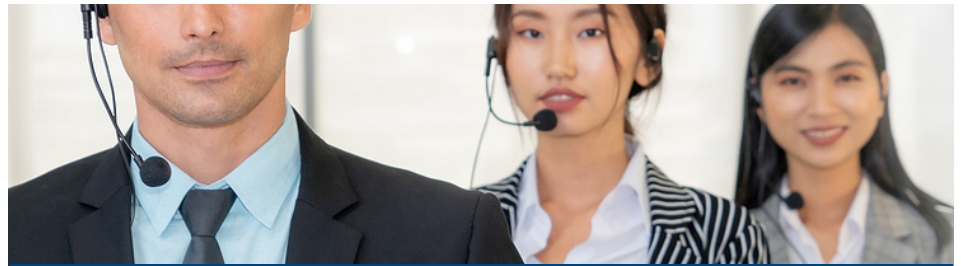
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# HCCT

Healthcare Contact Center Times

## Looking to Contribute?

The past few years, we have seen and experienced major changes in the healthcare call center industry. This now highly technical field is changing at a rapid pace. The need for efficiently run call centers has never been more important.

Healthcare Contact Center Times brings you every aspect of this journey. We seek your input for the benefit of others. If you wish to contribute an article, or to be interviewed for an upcoming issue, HCCT would welcome it. Stories such as:

- Staffing issues
- Technology issues that you are dealing with systems and procedures that are troubling your call center
- New programs that you have implemented in your call center that would be of interest to your fellow call center directors
- Experiences you have had during the pandemic
- Any aspect of call center management that you would like us to report on

We welcome you to contribute. *Please respond to:*

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# HCCT

JUNE 5-7, 2024 • ATLANTA

HCCT is thrilled to announce the 33rd Annual Healthcare Contact Center Conference for 2024 in Atlanta. After the success of our last conference, we're eager to gather once more and reconnect with old colleagues while meeting new ones. The inspiring stories of adapting and moving forward from challenging times in the industry have been truly inspiring. We've made progress, but there's still much to learn.

The three-day professional gathering will offer a diverse range of cutting-edge topics to cover the spectrum of today's healthcare call and contact center world. Join us from June 5th to June 7th, 2024, to discover strategies and tactics that will ensure your center's future success. Let's come together again to learn, grow, and shape the future of your contact center. Save the date, and we can't wait to see you there!

# 33<sup>rd</sup> Annual Conference of Healthcare Contact Centers

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# Letter From The Editor

Here at HCCT, we've developed an action-packed agenda for the annual conference in June. Our planning committee has played an integral role in the topics and format of the conference.

You'll notice that we are kicking off the conference with two "Master Classes" on June 5. The first, on hiring and training great people, was featured in our February issue.

That brings me to how we decided to do a "Master Class" on metrics.

Now you might be thinking, "That sounds like a really *dry* topic for a two-hour class." Yet, we hear consistently from attendees that they want and need to know more about data and reporting.

- What reports are most impactful?
- What do we measure "because we always have"?
- Are my metrics comparable with peer organizations?
- How do I best tell the story of my team's great work?

This is where our planning committee stepped in. During a planning call, we had a robust discussion about how to make this class useful, interesting, and fun. It all comes down to making this an *interactive* session. We want you to come prepared to share, ask questions and debate.

The class will be facilitated by Namz Rathore, Assistant Vice President for the Patient Contact Center, Orlando Health, who gave a highly rated session on metrics last year, and Steve McMillen, Principal, ECG Management Consultants, who has seen many different data reporting strategies in his work with clients across the country.

Metrics can tell a story. We'll help you make sure you're telling the right one.

## Our Thanks to the Planning Committee & Conference Advisors

**Adam Ackerman**  
Strategic Healthcare Consultant, EDCi

**Christine Caraher**  
Nurse Manager Office Hours  
Telephone Triage Program  
Children's Hospital of Philadelphia

**Sadie Howes DiAdriana**  
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Director, Patient Access  
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**Susan Webber, MSN, RN**  
Program Director of  
Clinical Support Programs  
Children's Health System of Texas

**Chris Wells**  
Director of Patient Access Support  
Services, Tegria

# HCCT PROGRAM

**WEDNESDAY, JUNE 5th**

**MASTER CLASS 1: *Hiring, Training, Retention: Solving Management Challenges***—8–10 a.m.

Speaker: Dolly Penland, President and CEO, Business Results

**BREAK**—10–10:15 a.m.

**MASTER CLASS 2: *Numbers Don't Lie: An Interactive Session on Metrics That Mean Something***—10:15 a.m.–12:15 p.m.

Co-Facilitators: Steve McMillen, Principal, ECG Management Consultants and Namrata (Namz) Rathore, AVP, Patient Contact Center, Orlando Health Medical Group

**LUNCH**—12:15–1 p.m. (*On Your Own*)

**CONFERENCE OPENING AND WELCOME**—1–1:10 p.m.

**Derek Lok**, Conference Director HCCT and

**Julie Bruns**, Conference Program Director HCCT

**GENERAL SESSION: *Results of the 2024 HCCT Contact Center Survey***—1:10–1:40 p.m.

Speaker: Mike Schneider, Co-Founder and Executive Vice President, Greystone.Net

**PANEL DISCUSSION: *Interpreting the 2024 Survey Results***—1:40–2:20 p.m.

Panelists: Danny Fell, Senior Vice President, Healthcare, BVK, Kathy Divis, President, Greystone.Net, and Darrell Mitchell, Director, Engagement Center, Roper St. Francis Healthcare  
Moderator: Mike Schneider, Co-Founder and Executive Vice President, Greystone.Net

**BREAK/VISIT EXHIBITS**—2:20–2:30 p.m.

**GENERAL SESSION: *Practical Applications of Generative AI in the Contact Center***—2:30–3:15 p.m.

Speaker: Danny Fell, Senior Vice President, Healthcare, BVK

**ROTATE**—3:15–3:20 p.m.

**CONCURRENT SESSION A: *A Bird in the Hand: Driving Revenue Through Radiology Order Management***—

3:20–4 p.m.

Speakers: Steve McMillen, Principal, ECG Management Consultants and Michelle Bober, Vice President, Strategy and Development, Silver Cross Hospital

**CONCURRENT SESSION B: *Using Conversational AI to Enhance Patient Self-Service***—3:20–4 p.m.

Speakers: Patsy Regan, Director of Contact Center Operations, Keck Medicine at USC and Sheila Kelly, Regional Account Executive, Parlance

**ROTATE**—4–4:05 p.m.

**CONCURRENT SESSION C: *Women in the Contact Center: A Leadership Primer***—4:05–4:45 p.m.

Speaker: Valerie McSorley, Chief Empowerment Officer, Women in Contact Center Leadership Virtual Community

**CONCURRENT SESSION D: *OneConnect: Creating a EHR Agnostic CRM to Improve Stakeholder Experience and ROI***—4:05–4:45 p.m.

Speakers: Cecilio Murillo, System Vice President, Ambulatory Access Strategy and Operations, CommonSpirit Health and Kelli Ferguson, Healthcare Consulting Manager, Accenture

**BREAK/SET UP FOR RECEPTION**—4:45–5:30 p.m.

**WELCOME RECEPTION**—5:30–7:15 p.m.

**THURSDAY, JUNE 6th**

**BREAKFAST/VISIT EXHIBITS**—7–8:15 a.m.

**SUNRISE SESSION**—7:45–8:10 a.m.

Speaker: TBD, Amtelco

**MORNING SESSION WELCOME**—8:15–8:20 a.m.

**Derek Lok**, Conference Director HCCT

**KEYNOTE SESSION: *The Power of the First Call—13,000 Callers Describe The Good, The Bad and The Ugly***—

8:20–9:10 a.m.

Speaker: Kristin Baird, BSN, MHA, President/CEO, Baird Group

**ROTATE**—9:10–9:15 a.m.

**CONCURRENT SESSION E: *Passing the Baton: Accelerating Excellence in Specialty Training Support***—9:15–9:55 a.m.

Speakers: Cassie Crary, Operations Manager, and Brynn Howard, MHA, Operations Administrator, Access Management, Mayo Clinic

**CONCURRENT SESSION F: *Personal Assistants: An Innovative Approach to Managing Population Health***—9:15–9:55 a.m.

Speakers: Sierra Kelly-Martinez, Director of Customer Engagement Center, and Susana Arroyo-Garcia, Supervisor of Patient Outreach, Renown Health

**BREAK/VISIT EXHIBITS**—9:55–10:10 a.m.

**NETWORKING ROUND TABLES**—10:10–10:55

1. Recruiting and Hiring Quality Staff
2. Managing a Remote Workforce: Benefits and Challenges
3. All Things Technology: Bots, Chat, AI, etc.
4. Clinical/Nurse Triage: QI, Risk Mitigation, Productivity
5. Contact Center Metrics: What is Meaningful?
6. Scheduling/Access Centers
7. Referral Management

**ROTATE**—10:55–11 a.m.

**NETWORKING ROUNDTABLES**—11–11:45 a.m.

1. Recruiting and Hiring Quality Staff
2. Managing a Remote Workforce: Benefits and Challenges
3. All Things Technology: Bots, Chat, AI, etc.
4. Clinical/Nurse Triage: QI, Risk Mitigation, Productivity
5. Contact Center Metrics: What is Meaningful?
6. Scheduling/Access Centers
7. Referral Management



# HCCT PROGRAM

**LUNCH**—11:45–12:45 p.m.

**VISIT EXHIBITS/ASSEMBLE IN CONCURRENT SESSIONS**—12:45–1 p.m.

**CONCURRENT SESSION G: *Intervening With Technology: Right Care, Right Time, Right Team***—1–1:40 p.m.

Speakers: Stacy Neill, Director Operations & Effectiveness and Sarah Ince, Director, Contact Center Operations, OSF HealthCare

**CONCURRENT SESSION H: *Maximizing Efficiency: Integrating Referral Management Into CRM for Seamless Scheduling***—1–1:40 p.m.

Speaker: Jeannine Spagna, Director of Call Center Operations, Clearway Pain Solutions

**ROTATE**—1:40–1:45 p.m.

**CONCURRENT SESSION I: *Revolutionizing Referral Management: Referral Intake Optimization Through Technology & Best Practices***—1:45–2:25 p.m.

Speaker: Tasia Mcleod, Program Director, Innovation & Implementation, New York Presbyterian

**CONCURRENT SESSION J: *Symptom Checker in Primary Care: Empowering Patients and Driving Self-Service***—1:45–2:25 p.m.

Speakers: Cristine Caraher, RN, Nurse Manager, Office Hours Triage, Children's Hospital of Philadelphia and Bonnie Offit, MD, Chief Innovation Officer, Self Care Decisions

**BREAK/ROTATE/VISIT EXHIBITS**—2:25–2:40 p.m.

**CONCURRENT SESSION K: *Facilitating Rapid Contact Center Growth—Double With No Trouble!***—2:40–3:20 p.m.

Speakers: Tara Hendrix, Director, Access Center and Jarrod Rhodes, Project Manager, Access Center, BJC HealthCare

**CONCURRENT SESSION L: *Leveraging Automated Technologies for Innovative Outbound Scheduling***—2:40–3:20 p.m.

Speakers: Jeff Venzke, Director, Access Center Operations and Kevin Whalen, Director, Patient Access Performance Analytics, Lehigh Valley Health Network

**ROTATE**—3:20–3:25 p.m.

**CONCURRENT SESSION M: *Digital Patient Engagement With Outbound Texting***—3:25–4:05 p.m.

Speakers: Elissa Nelson, Senior Director, Systems Transformation and Brenda Johnson, Senior Business Analyst-Systems Transformation, Enterprise Office of Access Management, Mayo Clinic

**CONCURRENT SESSION N: *Remote Patient Monitoring: Your Value Proposition and The Use of AI to Enhance Care***—3:25–4:05 p.m.

Speaker: Jason Mercer-Pottinger, RTS Director of Operations, Baxter International

**ROTATE**—4:05–4:10 p.m.

**CONCURRENT SESSION O: *AI and The Patient Journey***—4:10–4:50 p.m.

Speakers: Imran Iqbal, President, ASI Technology Advisors, Jonnita Pleasant, Director, Patient Access, Baylor College of Medicine and Sadie Howes DiAdriana, Chief Marketing and Experience Officer, Arkos Health

**CONCURRENT SESSION P: *Keeping Up With the Joneses: How to Successfully Bring On and Maintain a Sub-Specialty Clinic to Your Nurse Advice Line***—4:10–4:50 p.m.

Speakers: Linda Jackson, MSN, RN, Senior Director and Tamara Siegmund, Team Leader, Children's Health, Dallas

**FRIDAY, JUNE 7th**

**BREAKFAST/VISIT EXHIBITS**—7:30–8:30 a.m.

**MORNING SESSION/WELCOME and CLOSING DAY REMARKS**—8:30–8:40 a.m.

Speaker: Derek Lok, Conference Director HCCT

**PANEL DISCUSSION: *Creating and Nurturing Your Contact Center's Essential Partnerships***—8:40–9:30 a.m.

Panelists: Jacqueline Pilon, Manager of Upstate Connect Call Center and Switchboard, SUNY Upstate Medical University, Candace Deltrich, Director of Population Health and Engagement, Carson Tahoe Health, TBD  
Moderator: Adam Ackerman, Strategic Healthcare Consultant, EDCi

**PANEL DISCUSSION: *Hot Topics Panel: What's on Your Mind in 2024?***—9:35–10:25 a.m.

Panelists: Jonnita Pleasant, Director, Patient Access, Baylor College of Medicine, Ben Schilens, Chief Customer Officer, Orbita, and Melissa Shipp, Vice President, Digital Experience, OSF Healthcare  
Moderator: Kathy Divis, President, Greystone.Net

**BREAK/VISIT EXHIBITS**—10:25–10:40 a.m.

**PANEL DISCUSSION: *The Secret Sauce: Building Culture and Employee Engagement to Sustain Your Contact Center***—10:40–11:30 a.m.

Panelists: Sallie Kenney, Director of Support Center, Bluegrass Care Navigators and Jon Snyder, Manager of Customer Engagement, Renown Health  
Moderator: Jaysa Boyer-Tushaus, Head of Employer Engagement, Ultimate Medical Academy

**THANK YOU AND FAREWELL**—11:30 a.m.  
Derek Lok, Conference Director HCCT

We know effective training for new staff (and even training on new skills for experienced staff) is crucial to their success. This month, we focus on two innovative models that have proven success, from Mayo Clinic and Renown Health. At our annual conference in June, both organizations will be represented. Cassie Crary and Brynn Howard will offer a deeper dive into their orientation model at Mayo, and Jon Snyder from Renown will be featured on our panel discussion about employee engagement.

# Learn How Mayo Clinic in Rochester Trains Contact Center Agents

By Jessica Levco

For Mayo Clinic in Rochester, a seamless patient experience starts long before a patient comes to their appointment.

The first point of contact—oftentimes the contact center—plays a crucial role in shaping perceptions and setting expectations. Yet, with 950 agents spread across 40+ specialties and a high contact center turnover

rate, maintaining consistent, high-quality training posed a significant challenge.

“Previously, each specialty trained new hires individually,” says Cassie Crary, Operations Manager, Access Management at Mayo Clinic in Rochester. “This led to inconsistencies, with gaps in knowledge and varying training methods.”

In 2023, Crary and her team created a comprehensive training program that revolutionized how Mayo Clinic in Rochester trains its call center agents. At the **Healthcare Call Center Conference** in June, she’ll discuss Mayo Clinic in Rochester’s Specialty Training Program during her presentation, *“Passing the Baton: Accelerating*





# Patient Transfer: Simplified.

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## Excellence in Specialty Training Support.”

First, training lasts for six weeks where an agent learns essential call center skills, Mayo Clinic culture and basic scheduling procedures. After completion, an agent moves on to the Specialty Training Program. Here’s a look at what that includes:

- **Dedicated Trainers:**

Each specialty now has a designated trainer responsible for onboarding new hires and providing ongoing support. These trainers receive specialized training themselves, equipping them with the skills and knowledge to effectively coach and mentor new agents.

- **Knowledge**

**Management Platform:** A central platform houses standardized operating procedures, resources and training materials for all specialties. This makes it easier for both trainers and agents to access the latest information.

- **Data-Driven**

**Approach:** Crary and her team continuously collect and analyze data, including call metrics and agent feedback. This data is used to refine the program and identify areas

for improvement.

- **Embracing the Digital Future:** The call center landscape is evolving, with digital tools



like texting and self-scheduling. Within each specialty, agents learn more digital skills than just answering the phone.

Crary says that agents have benefitted from the Specialty Training Program. Not only do they feel more confident about their role, but the turnover rate has dropped 18.5 percent.

“This program isn’t just about training—it’s about investing in our staff and creating a better experience for our patients,” Crary says. ■

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# Discover How Renown Health's Training Program Boosts Contact Center Efficiency and Employee Retention

By Jessica Levco

Imagine waiting 90 days before you can even answer your first call at your new hospital contact center job. That was the reality for new hires at Renown Health. And this led to frustration, inefficiency and a high turnover rate—only 50 percent of new hires made it through training.

Jon Snyder, Manager of Contact Center L&D, PBX & Customer Service and Riley Petro, Manager of Customer Engagement

(Imaging) decided something needed to change. In 2020, they worked together to overhaul the training program.



**Jon Snyder**  
Manager of Customer Engagement  
Renown Health

“The old way we trained people was overwhelming,” Snyder says. “New agents were bombarded with information on all modalities all at once, leaving them feeling lost and discouraged.”

When creating a new training program, the duo focused on research-based learning methods. No more flashy educational gimmicks. Just the basics. Here's what their training



program focuses on:

- **Spaced repetition:**

Instead of trying to learn all the modalities at once, everything was spread out over time. “We’d teach them ultrasounds and then, when it was time to move on to mammograms, we’d bring in ultrasound examples to help repeat the neural pathways in their brain that reinforce learning,” Snyder says.

- **Building on cognitive schemas:**

Better known as “building blocks,” this approach takes into account the timing of when a person is trained. “For example, on the first day, we don’t do any learning because people aren’t primed to learn,” Snyder says. “They’re nervous, they want to know where the bathroom is and when their breaks are.” But on the second day, they learn a dash of Epic. Not all of Epic, but the basic tools of how to navigate it, key buttons and how to schedule an appointment.

- **Retrieval practice:**

This is the practice of trying to remember something, without any hints or prompts. For example, at the beginning of the training day—they might start with a pop quiz (no

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notes) and review basic tasks.

An essential element of the revamped program was the introduction of a mentor program. Experienced agents were trained to guide newcomers, providing personalized support and fostering a sense of community. This has helped boost employee morale.

“One thing that my team always says is we feel like family,” Petro says. “It’s really helpful to work with a team that has a lot of close friendships

because it gives people a chance to feel more comfortable with each other.”

Now, new hires are fully trained and handle calls independently within 30 days, a significant improvement from the initial 90-day training program. And one more statistic to throw in: A whopping 90 percent make it through training. ■

# How BJC HealthCare Expanded to a Centralized Contact Center to Enhance Patient Care

By Jessica Levco

In the world of healthcare, a streamlined patient experience extends far beyond the doctor's office. This philosophy drove a major contact center overhaul, transforming how patients connect with BJC HealthCare.

When the decision was made to centralize calls for all primary care practices, the contact center team faced a daunting task: double the number of practices supported in one calendar year.

Tara Hendrix, director of the Access Center at BJC HealthCare and Jarrod

Rhodes, project manager of the Access Center at BJC HealthCare will speak at our June conference to explain how they got all this done. It was tough, but they never lost sight of their mission.

"We realized that by taking those calls from individual practices, we were freeing up staff in the practice to focus on the patients in front of them," Hendrix says. "We wanted to standardize the process of scheduling appointments and position our contact center as the first touchpoint in the patient journey."

Here's a preview of the

presentation:

## **Rapid Growth, Measured Approach**

The challenge wasn't just about more calls—it was a staffing issue, too. The team established a new training cadence, launching classes every other week to onboard new hires. Recognizing the value of existing expertise, they streamlined the curriculum for those transferring from within the practices.

"It was stressful," Rhodes says. "We were balancing this aggressive growth with keeping everything running





smoothly. Boosting morale became a priority. We did small celebrations and created recognition opportunities to help the team stay energized throughout the year.”

Even though the initiative for centralization came from the C-suite, some practice leaders were hesitant. Listening to their concerns and answering their questions was important to make sure the process ran smoothly.

“It’s about building relationships,” Rhodes says. “Change is always hard, and they needed to know we were there to support them every step of the way.”

### **Partnership for a Seamless Transition**

Securing buy-in extended beyond the practices themselves. Leadership backing proved essential, but the contact center team knew they couldn’t do it alone. Close collaboration with their HR department ensured a steady flow of contact center talent, while IT became an indispensable partner. Their expertise with phone routing and equipment setup was essential to getting each new practice quickly integrated into the centralized system.

One unexpected hurdle was a lack of historical call data from the practices.

“We knew the offices were busy, but we were

flying a bit blind on just how many calls we should be staffing for,” Rhodes says.

### **Metrics of Success**

So, did this bold move pay off? The team keeps a close eye on their service level—the percentage of calls answered within 30 seconds. Their target is 80 percent and they are averaging 70 percent and projected to meet their goal this year.

“We’re proud of where we’ve come,” Hendrix says. “But we know it’s an ongoing journey. Refining processes, continuously training and staying adaptable is now part of our DNA.” ■

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