

# AI Buyer's Guide for Patient Engagement Automation

Choosing the right AI patient engagement platform can feel like navigating a maze blindfolded. This quick guide breaks it into five simple, high-impact items so you can choose smarter, faster, and with confidence.

## Profit and Cash Flow Impact—Don't Just Chase the Tech Buzz

1

An AI for patient engagement should do more than streamline workflows. It should strengthen your bottom line. The right partner helps uncover savings, open new revenue streams, and deliver measurable ROI aligned with your specialty, size, and location. Make sure their numbers tie directly to your P&L and cash flow before you commit.

2

## Multichannel Access Captures 100% of Patient Demand

Patients expect to reach you on their terms. Every call, text, or web inquiry is a revenue opportunity. Look for platforms that support true omnichannel engagement through phone, SMS, and web, so your organization meets and captures 100% of patient demand seamlessly.

## End-to-End Automation: Covering the Full Patient Journey

3

The patient journey is continuous from attraction to engagement to loyalty. It goes beyond answering calls to include payments, refills, follow-ups, FAQs, rescheduling, patient recovery, waitlists, and recalls, all handled automatically. End-to-end automation ensures no patient slips through the cracks and every interaction adds value.

4

## Security and HIPAA-Ready Infrastructure for Compliance and Trust

Don't settle for a demo that looks great but lacks healthcare-grade security, HIPAA controls, and robust Athenahealth integrations. Choose vendors with a multi-year track record in healthcare, solid data governance, and seamless integration with your operations. Because patient engagement means patient data, and trust matters.

## Pilot-First Approach: Test Before You Commit

5

The right platform should be easy to test, with minimal effort. A short, two- to four-week pilot should validate four key aspects: Solution quality—does it work? Operational fit—does it match your workflows? Adoption—will staff and patients use it? And financial impact—does it move the needle? This gives you a data-driven decision point so you don't commit until you've validated the fit.

**Nearly 80% of AI implementations fail due to immature technology, misaligned workflows, or leadership missteps.**

Source: RAND Corporation, 2024.  
("Why Do Artificial Intelligence Projects Fail So Often?")