2019 REPORT

Contact centers in healthcare

2ND ANNUAL SPOK SURVEY

spōk

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Introduction

As the main communications hub for many hospitals, the contact center can be an incredibly powerful part of healthcare organizations. In 2018, Spok introduced our contact center survey to learn more about the role of healthcare contact centers in a constantly changing and complex industry. This year, we continued our survey to see year-over-year trends and build more context on the current state of contact centers.

In our second annual survey, we asked about contact center challenges and strategies, their importance to the patient experience, plans for consolidation, and their transition to using cloud computing. We learned about the problems the hospital contact center faces and the perceived impact of these challenges in the organization.

Perhaps the most important takeaway is that the contact center is a department responsible for delivering exceptional patient communications, often with outdated technology and high staff turnover. As hospitals and health systems continue to rely on the contact center to meet patient experience goals, we'll likely see a heightened emphasis on this critical department to support today's healthcare environment.

Who we heard from

We collected data for this report in July 2019. Over 300 healthcare professionals from hospitals and health systems across the U.S. responded to the survey. Twenty-three percent were directors or managers of the contact center, IT, or telecommunications; 20% were executive leaders; 21% were contact center or IT staff; and the remaining 36% included a variety of clinical and administrative roles, from nurses and physicians to quality assurance, compliance, and informatics professionals.
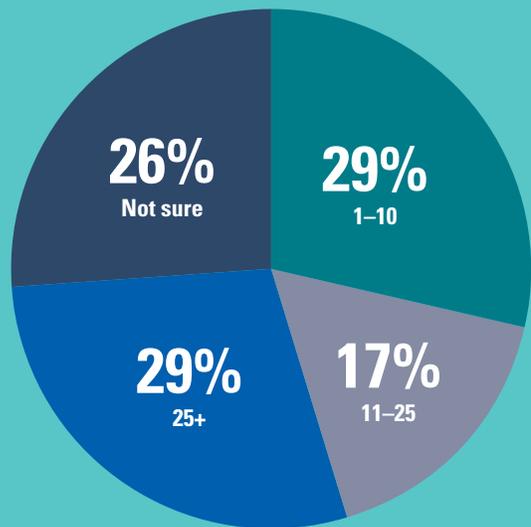
We also asked organizations to share the approximate size of their contact centers to help us gauge the scale of their operations.

What is your current title/role within your operation?

23% Director or manager

20% Executive leader

21% Contact center & IT staff

36% Clinical or administrative
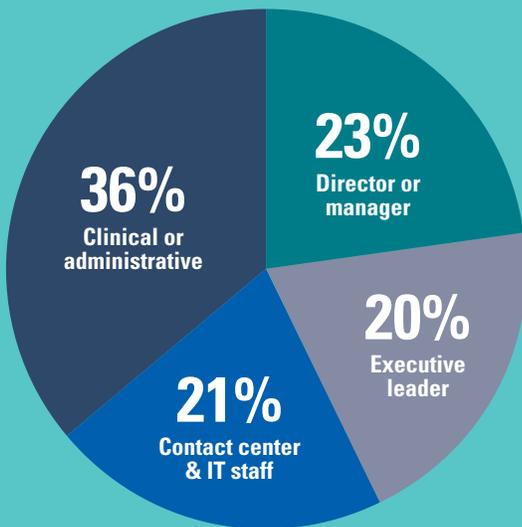
How many full-time operators do you have in place today?

26% Not sure

29% 1–10

17% 11–25

29% 25+

Note: Chart does not equal 100% due to rounding.

The biggest challenges in hospital contact centers today

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Select the No. 1 challenge your contact center faces today

- **23%** Recruitment and retention of call center staff
- **16%** Agents don't have the information necessary to proactively engage with customers/patients
- **16%** Inefficient processes
- **14%** Operate in a silo
- **9%** Lack the right technology and tools
- **9%** Unable to show value (insufficient reporting and analytics)
- **5%** Poor network reliability/uptime
- **9%** Other
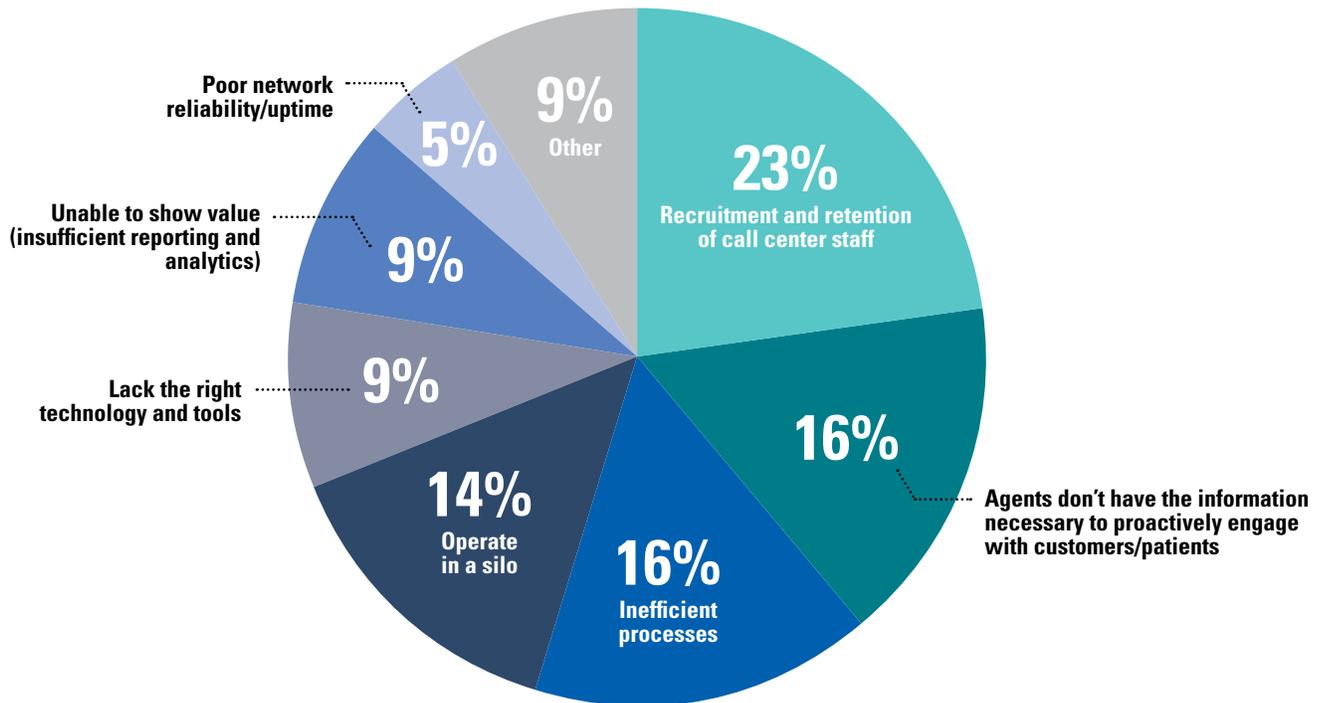
Note: Chart does not equal 100% due to rounding.

Amid the significant changes in hospital contact centers, we asked what the No. 1 contact center challenge is today. **A majority answered the recruitment and retention of staff.**

In 2016, call centers—regardless of industry—had a turnover rate between 30 and 45%, easily one of the highest rates in the country. In 2016, the average turnover rate for all industries was 18%. Combine that with the average turnover rate in healthcare at an above-average 20%, and it's no surprise this is a top issue for hospital contact centers.

Case study:
St. Dominic Hospital improves operator satisfaction and provides better customer service

See how one hospital reduced their call abandonment rate to less than 3% (compared to the national average of 13%)

Read now

In fact, it's likely other challenges contact centers face are contributing factors for the difficulty in retaining call center staff. If employees feel they don't have the right tools or information to do their job well, it becomes more difficult to retain them.

Next, we asked respondents how their No. 1 challenge impacted their organization.

How does your No. 1 challenge impact your organization? (Check all that apply)

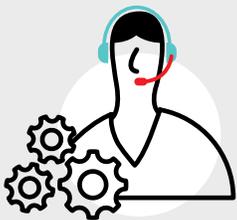**Does not support patient engagement or patient experience**

55%

Unable to transform contact center into a revenue generating hub

44%

Other

10%

Among those who selected "Other," respondents clarified the impact was poor provider experience, staffing issues, and impacts on efficiency.

When asked how they would improve contact center operations at their hospital, many respondents pointed to the need to recruit and retain call center staff.

"Quality training should be implemented for each new hire; they MUST have good communication skills and be able to clearly be confident, professional, and accurate. The turnover is massive. The salary rate for the work and responsibility involved is too low."

"Raise the entry-level pay of staff to promote better employees and retain them longer."

"Hire correct employees and provide correct training."

Contact centers as critical to the patient experience

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What impact does the hospital contact center have in increasing patient satisfaction? With more hospitals looking for patient engagement to drive success in value-based care models, the question grows more and more important. Value-based care models require that each part of the continuum of care is fully developed for the patient—including points of communication like the contact center.

Though hospitals have long used surveys like HCAHPS to measure patient satisfaction, these surveys collect data at the completion of care, not in real time. The retrospective nature of these measurements don't allow organizations to improve the patient experience in the moment, and often focus on the patient's clinical experience. This positions the contact center as a potentially untapped part of the patient experience that can improve satisfaction.

70%

More than 70% believe their contact center proactively contributes to the patient experience.

Respondents to the survey confirm contact centers can play a critical role in increasing patient satisfaction.

With more than 70% of respondents reporting their organization's contact center contributes **considerably** or **a great deal** to the patient experience, it's clear hospital leaders recognize the contact center as more than the "answer and transfer" department of the past.

Does your contact center proactively contribute to the patient experience?

3%
Not at all

10%
Slightly

16%
Moderately

30%
Considerably

41%
A great deal
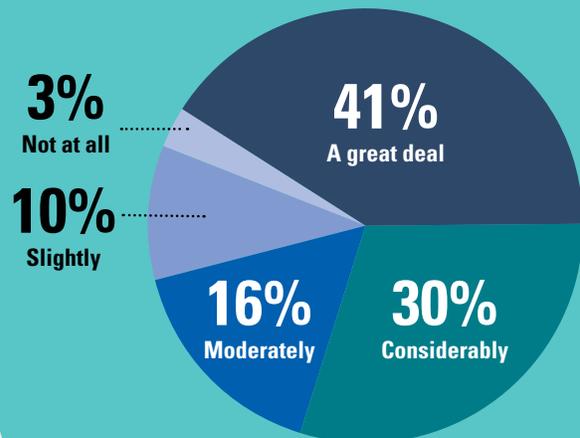
Next, we wanted to better understand what technologies participants feel have the biggest impact on care delivery, and if they are currently implementing these solutions. This gave us insight into the potential future of the contact center as related to increasing the impact on patient care. **AI-based conversational user interface technology** led the way, followed by **unified communication tools**. The technology used most often, **digital channels** (57%), was also the technology selected least often as impacting care delivery.

What technology do you think will have an impact on care delivery in the future? Are you using it now?

- Will impact care delivery
- We use it

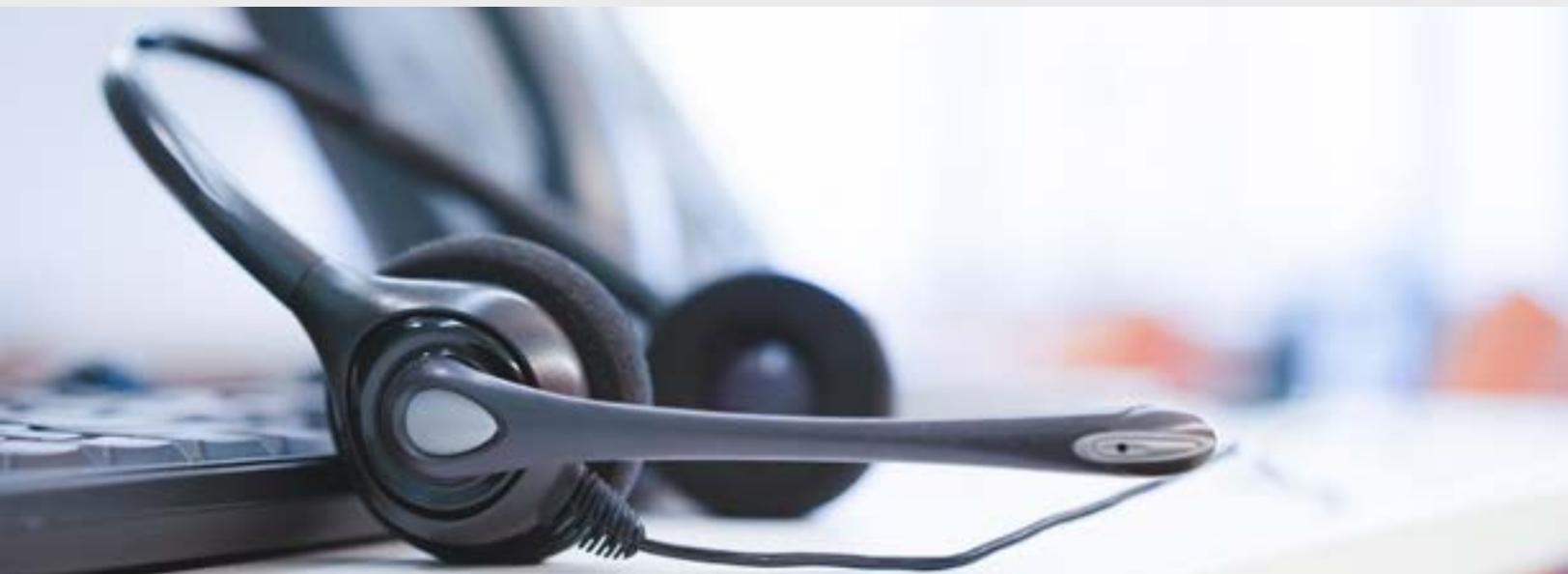**AI-based conversational user interface technology (voice- and text-based bots)**
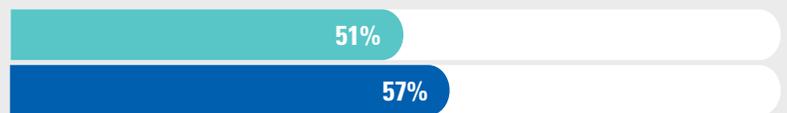
63%

18%
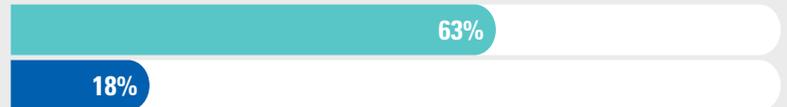
Unified communication tools (team collaboration applications)

60%

40%

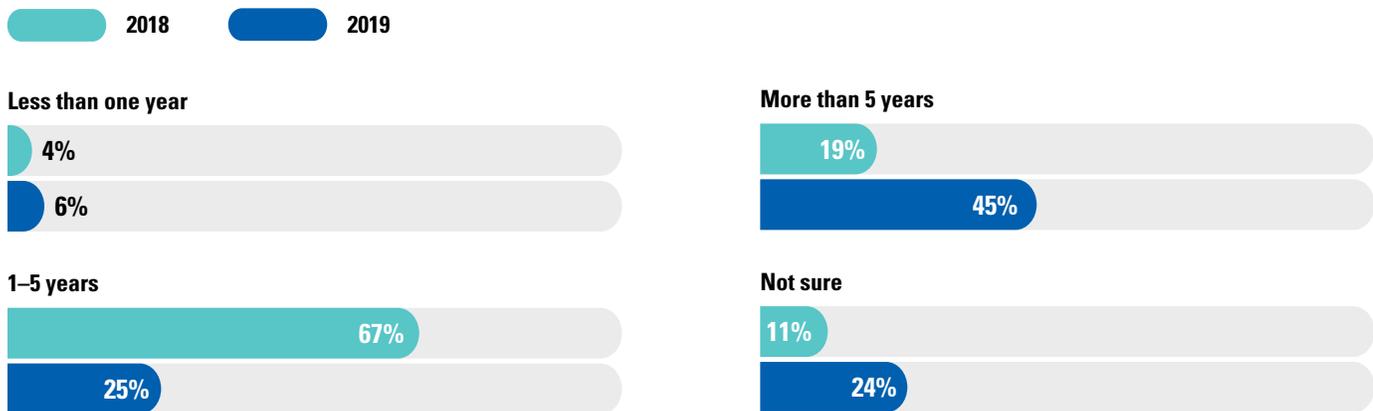**Adoption of cloud communications**

56%

26%

Digital channels (email, text/SMS, social media, live chat, web callback, etc.)

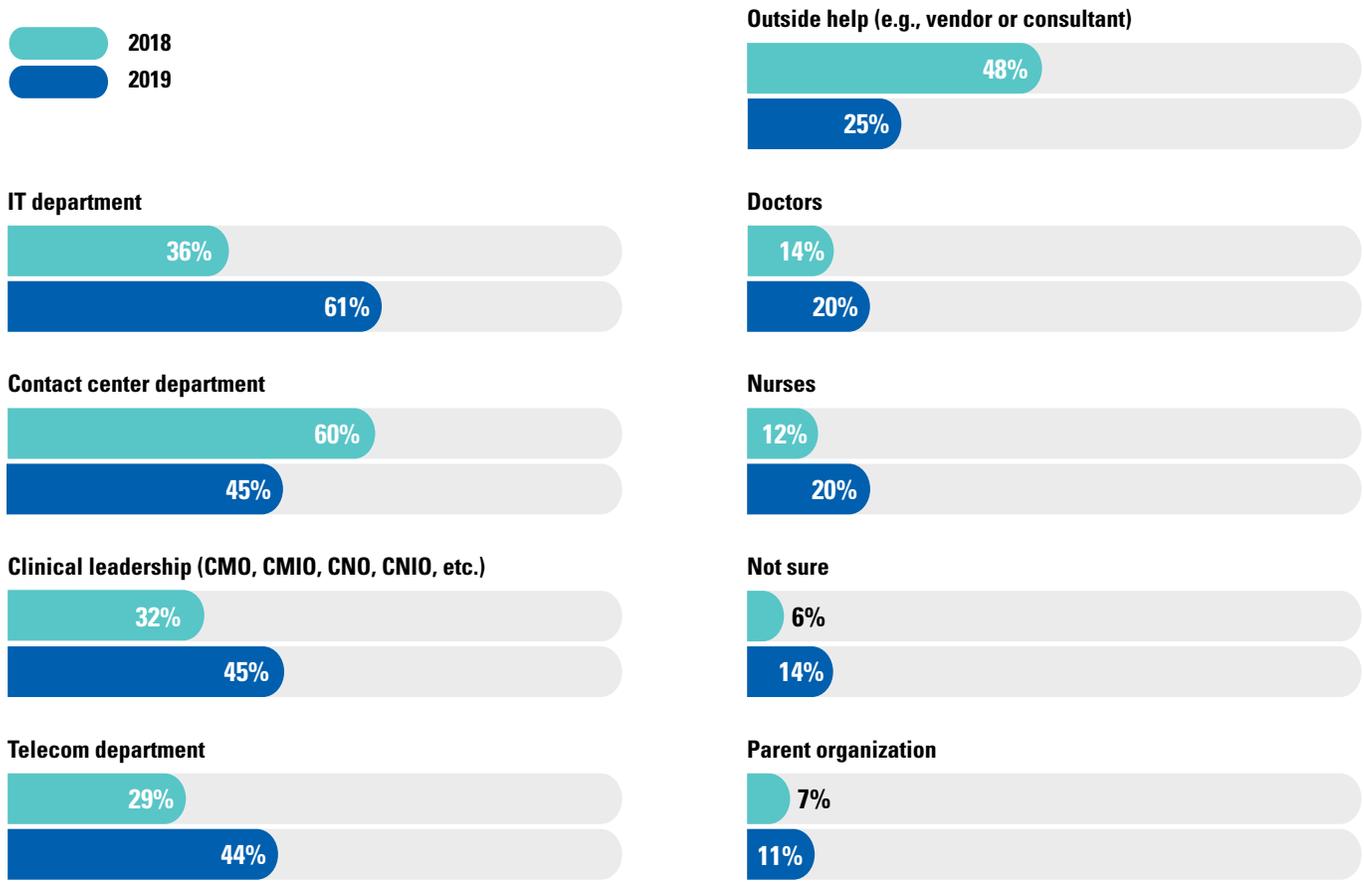51%

57%

The strategy to get there

For those with a strategy in place, **almost half have had a strategy for more than five years**. This suggests including the contact center as a crucial piece to meet overall department goals is an established practice. Interestingly, in 2018, most participants reported having a contact center strategy for 1–5 years. Now, in 2019, the majority shifted to more than five years, representing a possible maturation of contact center strategies.

How long has your strategy been in place?

2018　　**2019**

Less than one year

2018: 4%
2019: 6%

More than 5 years

2018: 19%
2019: 45%

1–5 years

2018: 67%
2019: 25%

Not sure

2018: 11%
2019: 24%

Next, participants shared who was involved in creating the contact center strategy. **In 2019, more staff outside the contact center were involved in creating the strategy compared to 2018.** The most significant group was the IT department, who was involved 61% of the time. Interestingly, the contact center itself was only involved in creating the strategy 45% of the time. As a whole, clinical leadership, physicians, and nurses were the groups most commonly involved in creating a strategy.

Who was involved in creating the contact center strategy for your organization? (Choose all that apply)

2018
2019

Outside help (e.g., vendor or consultant)
- 48%
- 25%

IT department
- 36%
- 61%

Doctors
- 14%
- 20%

Contact center department
- 60%
- 45%

Nurses
- 12%
- 20%

Clinical leadership (CMO, CMIO, CNO, CNIO, etc.)
- 32%
- 45%

Not sure
- 6%
- 14%

Telecom department
- 29%
- 44%

Parent organization
- 7%
- 11%

Respondents also shared how contact center policies and procedures are enforced at their organization, with the contact center department and IT department as clear preferences. This may reflect the continued and/or increased use of technology in contact centers.
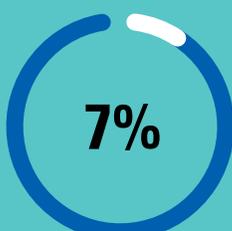
Who enforces your contact center policies and procedures? (Choose all that apply)

59%
Contact center department

32%
IT department

25%
Telecommunications department

7%
Other (please specify)

12%
Not sure

6%
We don't have a method for enforcing policies and processes

4%
External entity

The bottom line: Contact center efficiencies and consolidation

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Traditionally, hospital contact centers were considered a necessary cost of business. Now, organizations are shifting to a heightened focus on ways to improve the patient experience and generate revenue opportunities.

One trend to contribute positively to the bottom line is by gaining efficiencies through consolidation. Consolidation can mean merging technologies, combining physical locations, or increasing operational efficiency with staff consolidation and automation.

5+

Of those with more than one contact center solution, almost 40% use **more than five solutions** to fulfill contact center responsibilities.

And yet, more than 93% of respondents feel their contact center is at least somewhat efficient.

How would you rate the operational efficiency of your organization's contact center?

43%
Very efficient

7%
Not at all efficient

51%
Somewhat efficient
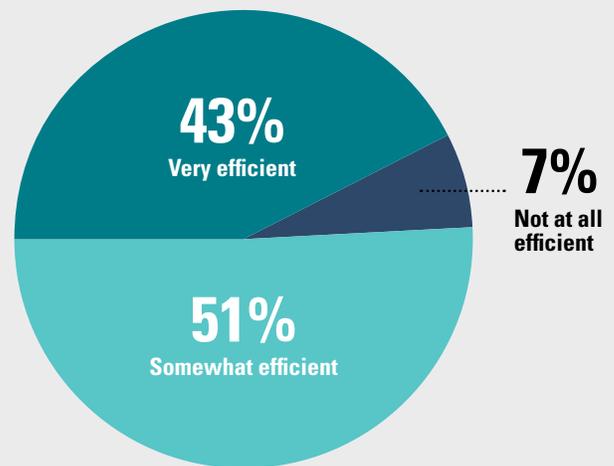
*Note: Chart does not equal 100% due to rounding.*

One consistent trend among participants is the sheer volume of solutions in their contact center. Almost **60% use multiple contact center solutions**. Of those with more than one solution, almost 40% are using more than five.

You stated your contact center uses multiple solutions. How many solutions are used today?

38%
More than 5

62%
Fewer than 5
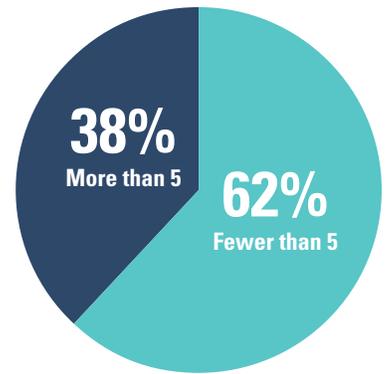
Using more than one solution appears to be a trend many organizations are working to change—almost 42% of respondents reported plans or initiatives to consolidate.

Do you have plans or initiatives to consolidate your contact center solutions?

58%
No

42%
Yes
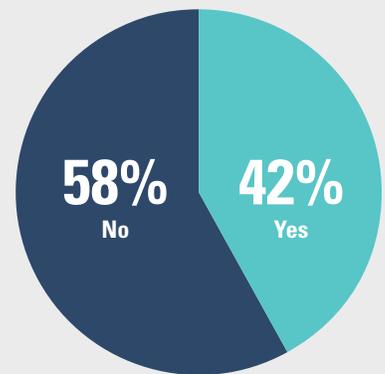
# Current and future hospital contact center devices and solutions

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We know almost 60% of survey participants use multiple solutions in their contact centers. What are these solutions, and are contact centers planning to implement any new or different technologies in the future? Additionally, does it appear new solutions have been implemented since our 2018 survey?

Which of the following solutions does your hospital use to ensure the success of your contact center?

- **2018**
- **2019**

Quality management

Have in place today

77%	2018
79%	2019

Plan to implement in the next 1–3 years

12%	2018
9%	2019
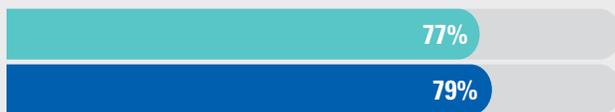
Analytics & reporting

Have in place today

73%	2018
74%	2019

Plan to implement in the next 1–3 years

14%	2018
9%	2019
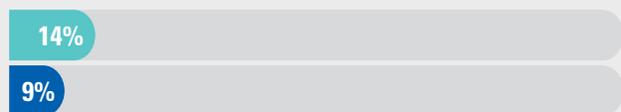
Call recording

Have in place today

45%	2018
71%	2019

Plan to implement in the next 1–3 years

40%	2018
12%	2019
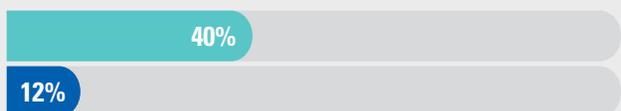
On-call scheduling solutions

Have in place today
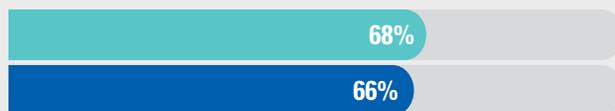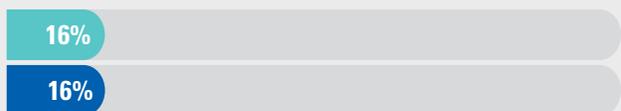
68%	2018
66%	2019

Plan to implement in the next 1–3 years

16%	2018
16%	2019

Which of the following solutions does your hospital use to ensure the success of your contact center? (continued)

Interactive voice response (IVR) systems

Have in place today

29%	
50%	

Plan to implement in the next 1–3 years

46%	
21%	

Deployment of new PBX vendors/technologies

Have in place today

66%	
55%	

Plan to implement in the next 1–3 years

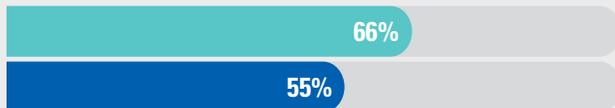|	
16%	
25%	
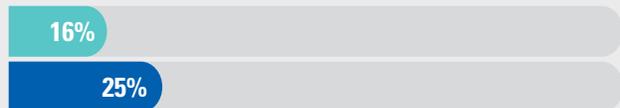
Use of remote agents

Have in place today

52%	
49%	

Plan to implement in the next 1–3 years

21%	
23%	
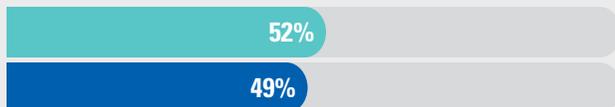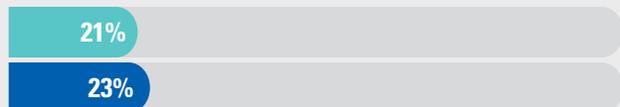
Voice-controlled communications devices (e.g., voice badges)

Have in place today

25%	
37%	

Plan to implement in the next 1–3 years

44%	
26%	

The biggest change from 2018 to 2019 is **the use of call recording**, which increased from 45% to 71%. This jump in use could be an indication that more hospitals recently implemented call recording to demonstrate compliance with HIPAA and other medical record regulations. Another notable increase is **the use of interactive voice response (IVR) systems**. The data suggests many of the 46% of respondents in 2018 who planned to implement IVR systems have completed implementation, accounting for the increase from 29% to 50% who have it in place today.

Since 2018, participants reported a decrease in the deployment of new PBX vendors and technologies. This reduction from 66% to 55% is consistent with the high percentage (42%) who plan to consolidate the number of solutions and/or technologies in their contact center.

The cloud and the contact center

Cloud computing has permeated consumer and many businesses for its vast benefits—including lower operating and IT costs, increased security, and better reliability. Healthcare, along with other deeply regulated industries, has been slower to embrace cloud technologies. However, roughly 65% of executive-level hospital leaders in a 2017 HIMSS study say they currently use cloud or cloud services within their organization, including clinical application and data hosting, data recovery and backup, and the hosting of operational applications.

As healthcare moves to fully embrace cloud computing, we wanted a snapshot of what cloud technology respondents have in place today for their contact centers, as well as the overall perception of the risks and rewards related to cloud computing.

Free ebook:
Why the future of healthcare is in the cloud

Read how cloud computing in healthcare can help with your hospital's most pressing challenges.

Download now

More than 40% of participants reported **not using any of the above cloud/hosted technologies in the cloud**. Of those who selected "Other," most respondents clarified they didn't know or were unsure what cloud solutions their organization uses. This could be a reflection of the overall slow transition in healthcare to cloud computing due to security and other concerns.

Which of the following cloud solutions is your organization using?

24%
Cloud/hosted healthcare communication platform

21%
Cloud/hosted contact center solution

11%
Cloud/hosted PBX solution

11%
Cloud automatic call distribution (ACD) solution

43%
None of the above

6%
Other
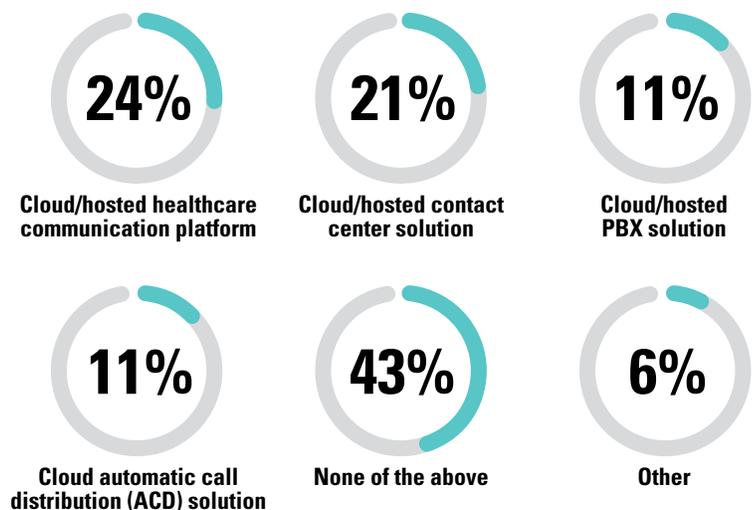
We asked what the No. 1 reason is for contact centers to use cloud technologies. **Avoiding expensive upgrades** got the highest response. As the hospital contact center looks to increase revenue and reduce costs, perhaps this isn't surprising. Following was **reducing internal IT management**, with respondents selecting all other options far less.

What would you consider the primary driver for implementing cloud contact center technologies?

Other — 7%
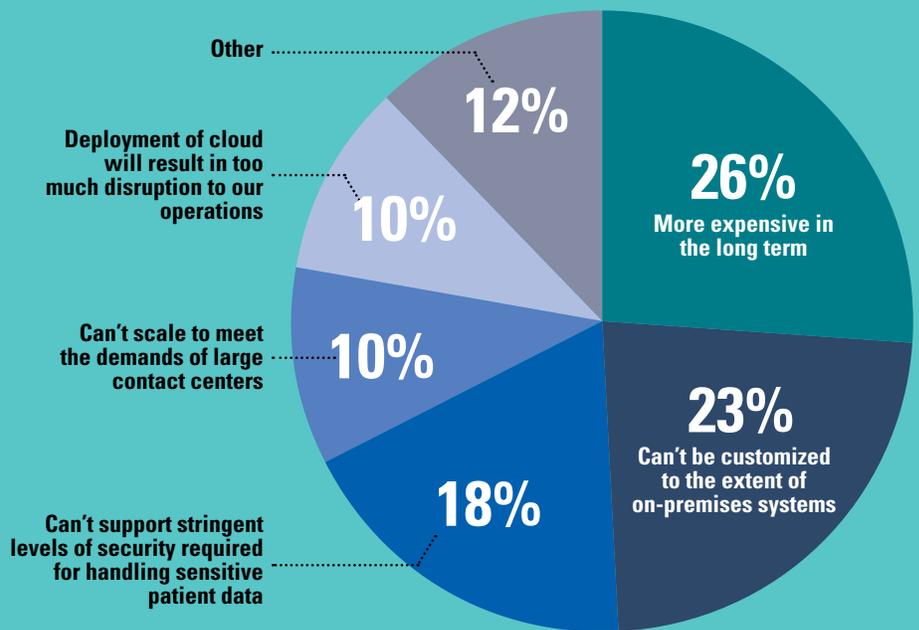Support discrete operations, such as a small help desk — 4%
Start a new contact center at short notice — 4%
Make monthly adjustments to agent license counts — 6%
Consolidate work groups — 11%
Try new functionality (more quickly and less expensively) — 11%

32% Avoid expensive upgrades required with older on-premises platforms

25% Reduce internal IT management of complex, feature-rich contact center systems

If the No. 1 driver for implementing cloud technologies is cost savings, what's the primary reason keeping contact centers from moving to the cloud?

The most chosen option was that cloud contact center technologies are **more expensive in the long term**, indicating an understanding of cloud technology costs that may or may not be accurate. This answer was closely followed by the **limitations in customization**, which may be another element of cloud technology that is not well understood. Interestingly, the No. 1 driver to both implement and forgo cloud technologies is related to cost.

What would you consider the primary reason *not* to implement cloud contact center technologies?

Other — 12%
Deployment of cloud will result in too much disruption to our operations — 10%
Can't scale to meet the demands of large contact centers — 10%
Can't support stringent levels of security required for handling sensitive patient data — 18%

26% More expensive in the long term

23% Can't be customized to the extent of on-premises systems

Note: Chart does not equal 100% due to rounding.

As organizations move from using on-premises technologies to those in the cloud, resources will likely require a shift. Traditionally, on-premises solutions encompass an upfront cost to "own" the solution, and future upgrades are an additional expense. Professional services are often required at a cost that can be significant.

Cloud technologies, on the other hand, require little upfront cost but a subscription fee that often uses "pay as you go" pricing, where there is no additional cost for upgrades. Little to no professional services are required, as options for self-service often increase. Therefore, cloud technologies usually aren't more expensive in the long term, but certainly require a shift in the way they are budgeted for and how resources are allocated. By 2022, Gartner expects 28% of IT budgets to be spent on cloud computing (up from 19% in 2018) as costs shift away from traditional hardware and software.
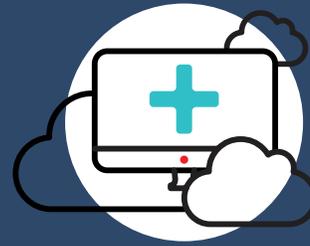
Cloud computing in healthcare

See how over 100 healthcare professionals created (or plan to create!) cloud computing strategies.

Read now

Improvements for the future

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We ended the survey with an open-ended question asking respondents how they would improve contact center operations at their organization. Most of the opportunities for improvements were related to staffing and better communications. We broke down their specific responses into three categories:

What is one thing you'd suggest doing to improve contact center operations at your organization?

1

Consolidation of tools and internal roles

Consolidation of communications is at the top of mind for many participants, as it was in 2018. Responses included suggestions to consolidate technology systems, and different contact center roles and efforts. One comment called for "more collaboration across the entire organization. Small call centers have popped up to facilitate some needs, but [we need] greater efficiency and effectiveness through a consolidated effort."

2

A more robust strategy, including a plan for staff retention

Many responses focused on the need for an updated contact center strategy, and one that includes staff recruitment and retention. Some simply called for "a team strategy" or a "focus on the long-term goals." One respondent requested "a comprehensive, enterprise-wide needs analysis and the development of a holistic, suitable strategy to support [both] today's operations and the next two to three decades."

3

Better technology that improves collaboration

Responses in this category ranged from simply "better and more innovative technology" to remarks about increasing interoperability to "upgrade telecommunications platform to the most efficient products that communicate with other applications." Often more "modern technology" was directly tied to increasing patient care or patient experiences.

Conclusion

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Our second annual contact center survey revealed two main themes:

1 Contact centers are an invaluable part of ensuring an exceptional patient experience.

2 Contact centers are completing their important tasks amid frequently changing processes with outdated technology and ongoing staffing issues.

As a critical department in the organization, changes to technology are often met with understandable trepidation. There are often multiple solutions contact center staff must master, and the technology running these solutions is frequently outdated and disconnected.

It's also a department facing incredible change. As healthcare becomes more of a consumer-driven market, it follows that hospitals will require contact centers to become adept at serving hospital-patient communication through multiple channels to better meet the consumer where they are. Different patients have different communication preferences and may come to favor those

hospitals that support multiple channels to communicate with their providers.

As healthcare organizations continue to explore new value-based care models, the rate of change will likely not slow down for the contact center. There lies a real opportunity to implement technology that can consolidate tools; replace outdated solutions with more intuitive, modern, and efficient systems; and increase staff satisfaction by doing so. As with many transformations, there are certainly large challenges to address, but our survey indicated that this is an area with potential for positive change.

ABOUT SPOK, INC.

Spok, Inc., a wholly owned subsidiary of Spok Holdings, Inc. (NASDAQ: SPOK), headquartered in Springfield, Virginia, is proud to be a global leader in healthcare communications. We deliver clinical information to care teams when and where it matters most to improve patient outcomes. Top hospitals rely on the Spok Care Connect® platform to enhance workflows for clinicians, support administrative compliance, and provide a better experience for patients. Our customers send over 100 million messages each month through their Spok® solutions. Spok is making care collaboration easier.

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