



Welcome to Voices25

Welcome to Voices25!



COURAGE | AUTHENTICITY | FUN



Milestones

7 Years
+
Half a Billion
Voices



Meet Kimmy C



Chief Happiness Officer



Partnerships



Safety Event & KBo



KBo New Chat X

Hello, I'm KBo, your Authenticx AI assistant. I'm here to help you discover meaningful insights. How can I assist you today?

How many calls started with a neutral sentiment and contained an Eddy in the last 2 months?

Reducing Friction

Through the power of everyday conversations

12 MONTH EDDY EFFECT
IMPROVEMENT

 **8.9%**

12 Month Average

TIME IMPACT

159 Days

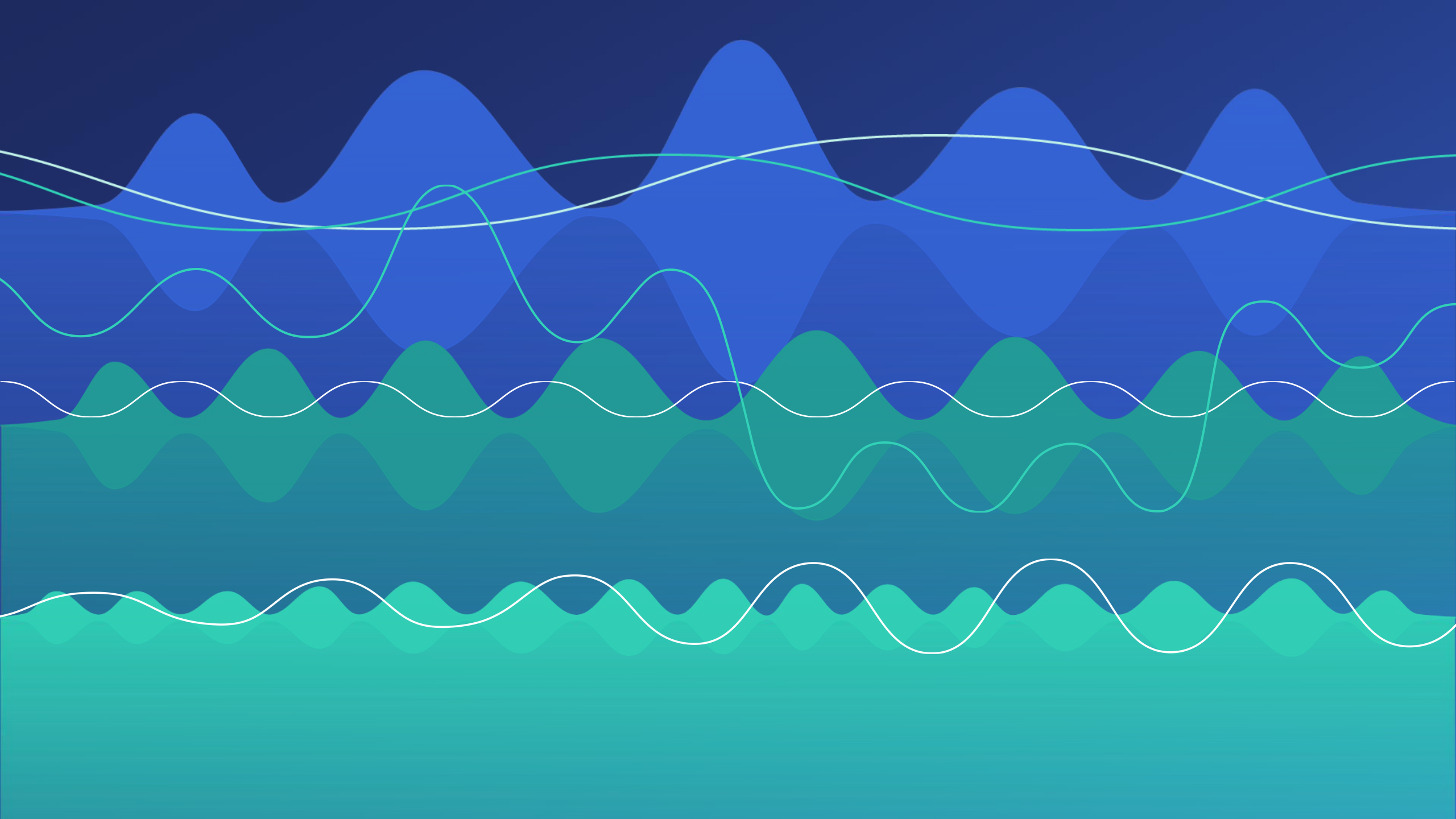
Saved Call Time - Average

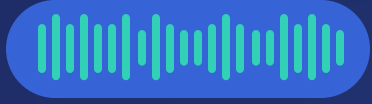
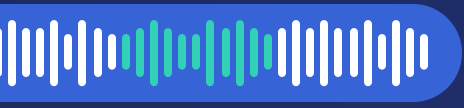
COST IMPACT

\$500K

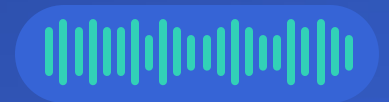
Identified Cost
Savings - Average







The role of humans **matter.**



AI Purchase Pattern



Workforce

94% of Gen Z &
92% of Millennials
consider **meaningful
work a top priority**

Deloitte



PURPOSE

New Survey Shows Purpose Drives Employee Engagement And AI Adoption

By [Chris Westfall](#), Contributor. © Guidance for
leaders and aspiring leaders, interested in...

[Follow Author](#)

Published May 01, 2025 at 09:30am EDT

Workforce



Framework for Workforce

Define: Values for a Purpose-Filled Workforce

Create: Decision Matrix to Help Operationalize

Consider

- Organizational values for human creativity
- Tasks that is ideal for human, AI or both
- What is at stake
- Re-skilling or human-AI collaboration skills

Customer

U.S. Businesses lose \$75 billion annually due to poor customer experiences.

Fast Company



“Patients who feel understood are more willing to engage, comply, and remain loyal.”

Society for Personality and Social Psychology

BEING UNDERSTOOD

Customer



BEING UNDERSTOOD

Framework for Customers

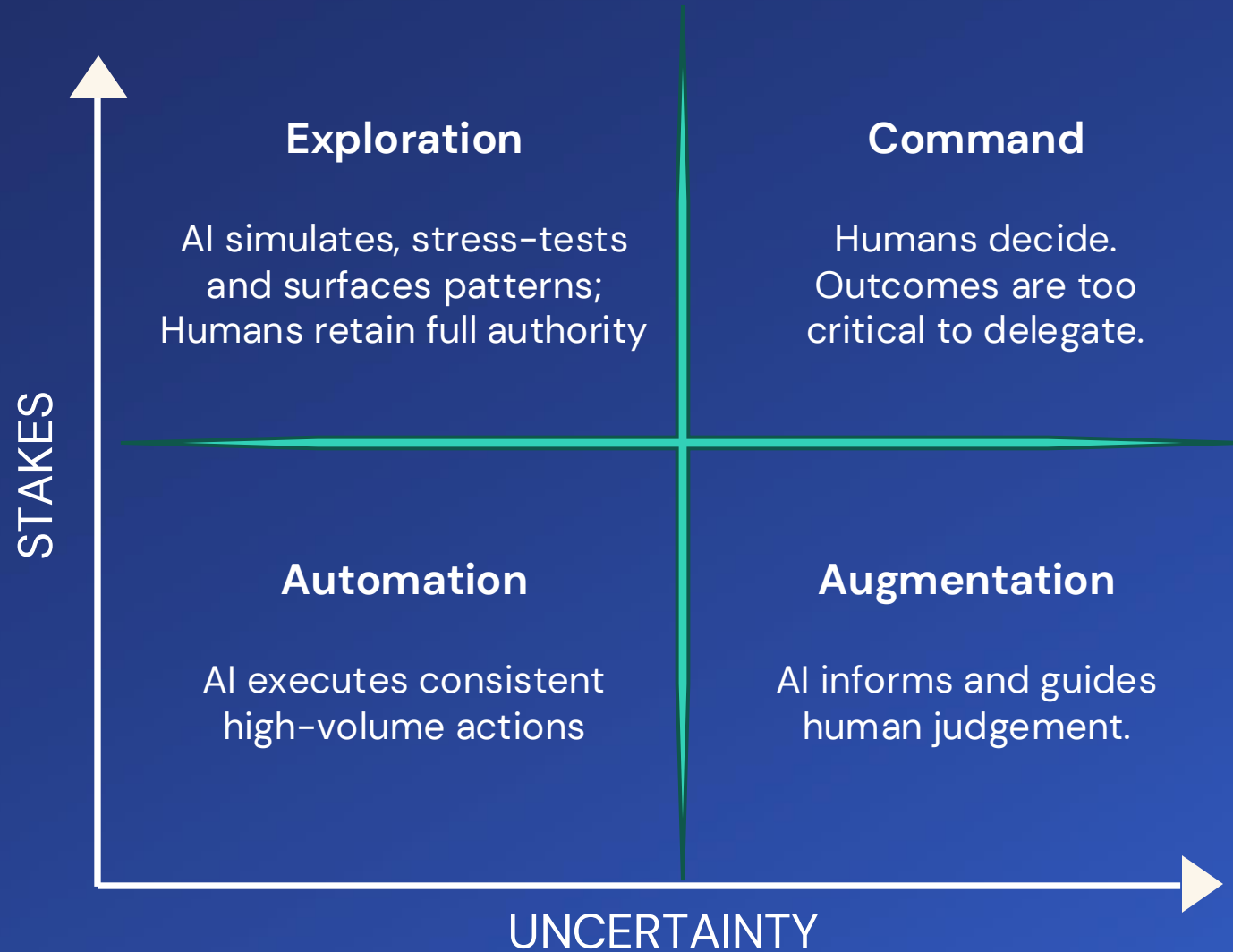
Define: Values for Deliver on Understanding

Create: Strategy That Prioritizes Understanding

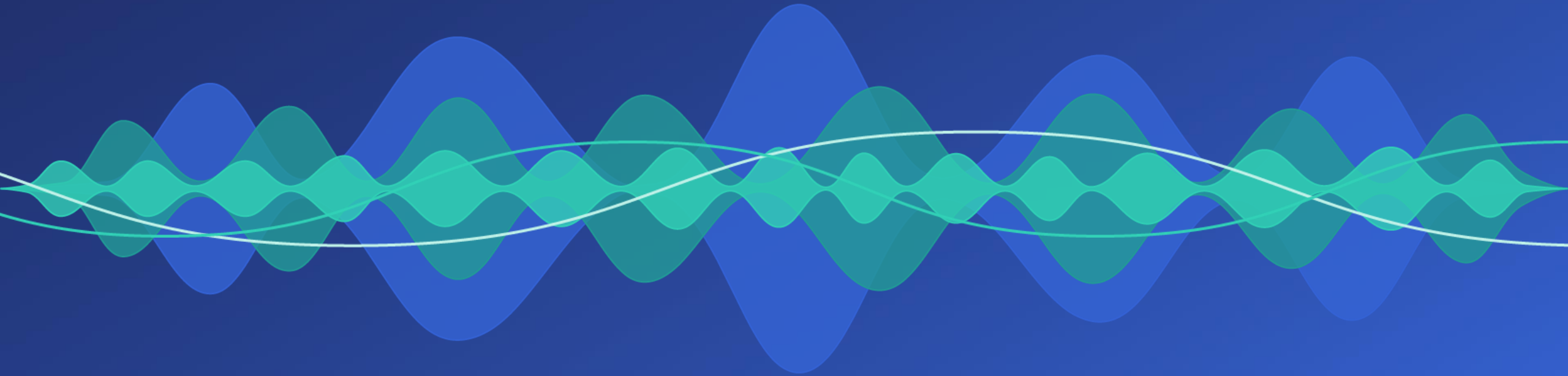
Consider:

- Transparency in AI-driven communications
- Customer preferences and choice
- Design for empathy and continual understanding
- Protect privacy and dignity

Decision Matrix for Human-AI Collaboration

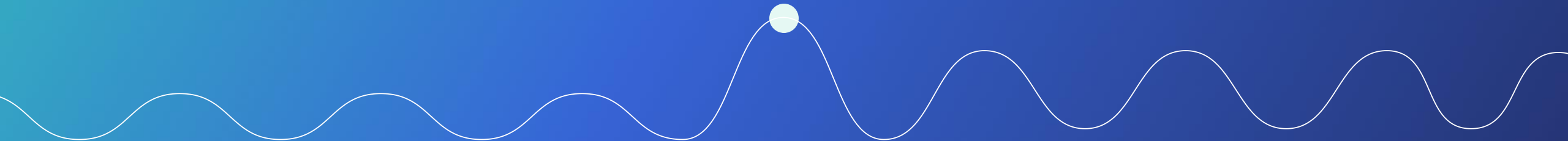


We have entered **a new age.**





Digital



Google Search Engine

This is a demo of the Google Search Engine. Note, it is research in progress so expect some downtimes and malfunctions. You can find the older [Backrub web page here](#).

Google is being developed by [Larry Page](#) and [Sergey Brin](#) with very talented implementation help by [Scott Hassan](#) and [Steremberg](#).



Search Stanford

Search The Web

Current Status of Google:

Web Page Statistics

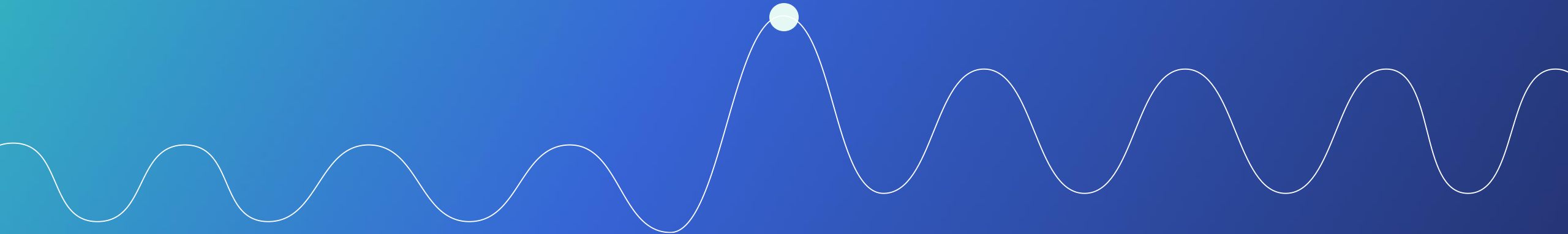
Number of Web Pages Fetched 24 million

Number of Pages Indexed 76.5 million





Connected







Intelligence & AI





Hi! How e

Implementing AI requires industry expertise

↘ **85%**

of AI projects **fail** to go beyond a pilot

GARTNER

↘ **95%**

of Gen AI projects **fail** to deliver meaningful results

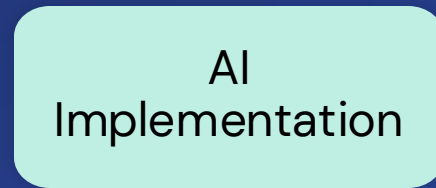
MIT STUDY, AUG. '25

↘ **55%**

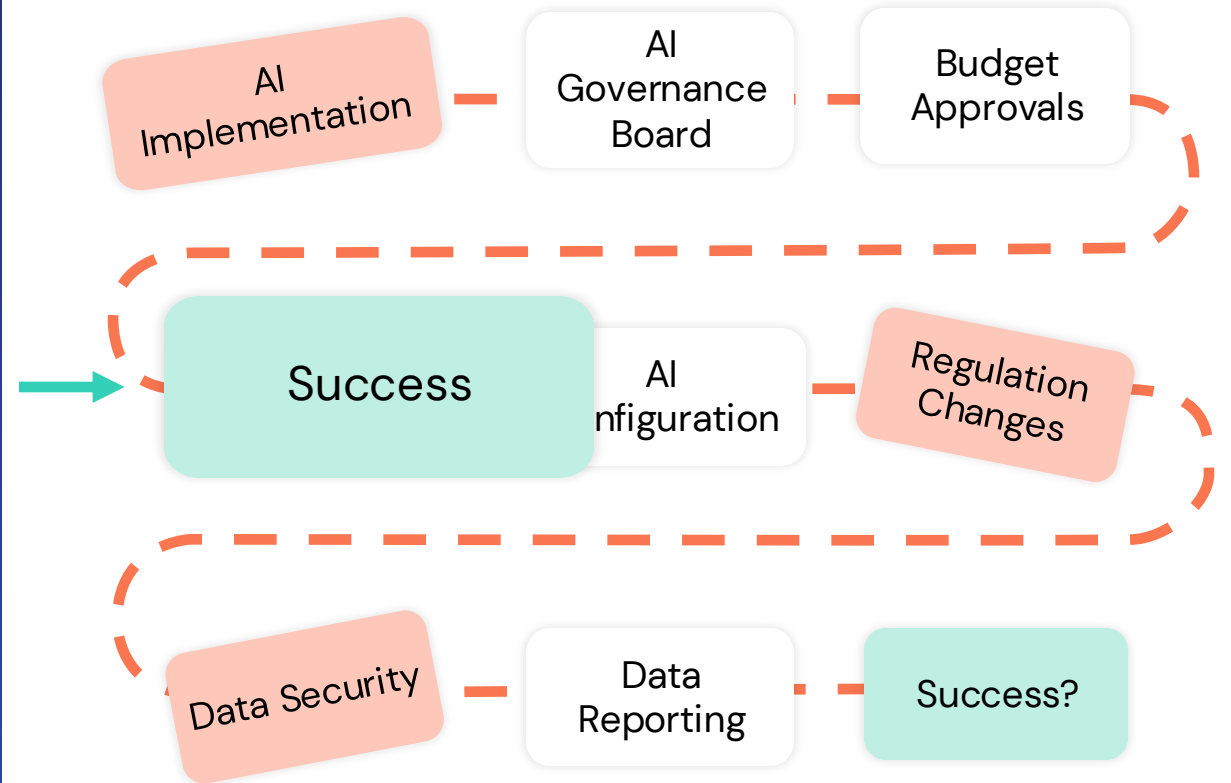
of companies **regret** laying off staff due to AI & automation

ORGVUE, APR. '25

Expectation



Reality



Org charts and metrics
are **not keeping up.**

CIO JOURNAL

Why Moderna Merged Its Tech and HR Departments

The vaccine maker, which has partnered with OpenAI since 2023, is rethinking how it does workforce planning thanks to the growing capabilities of AI and other tech

By *Isabelle Bousquette* [Follow](#)

May 12, 2025 7:00 am ET

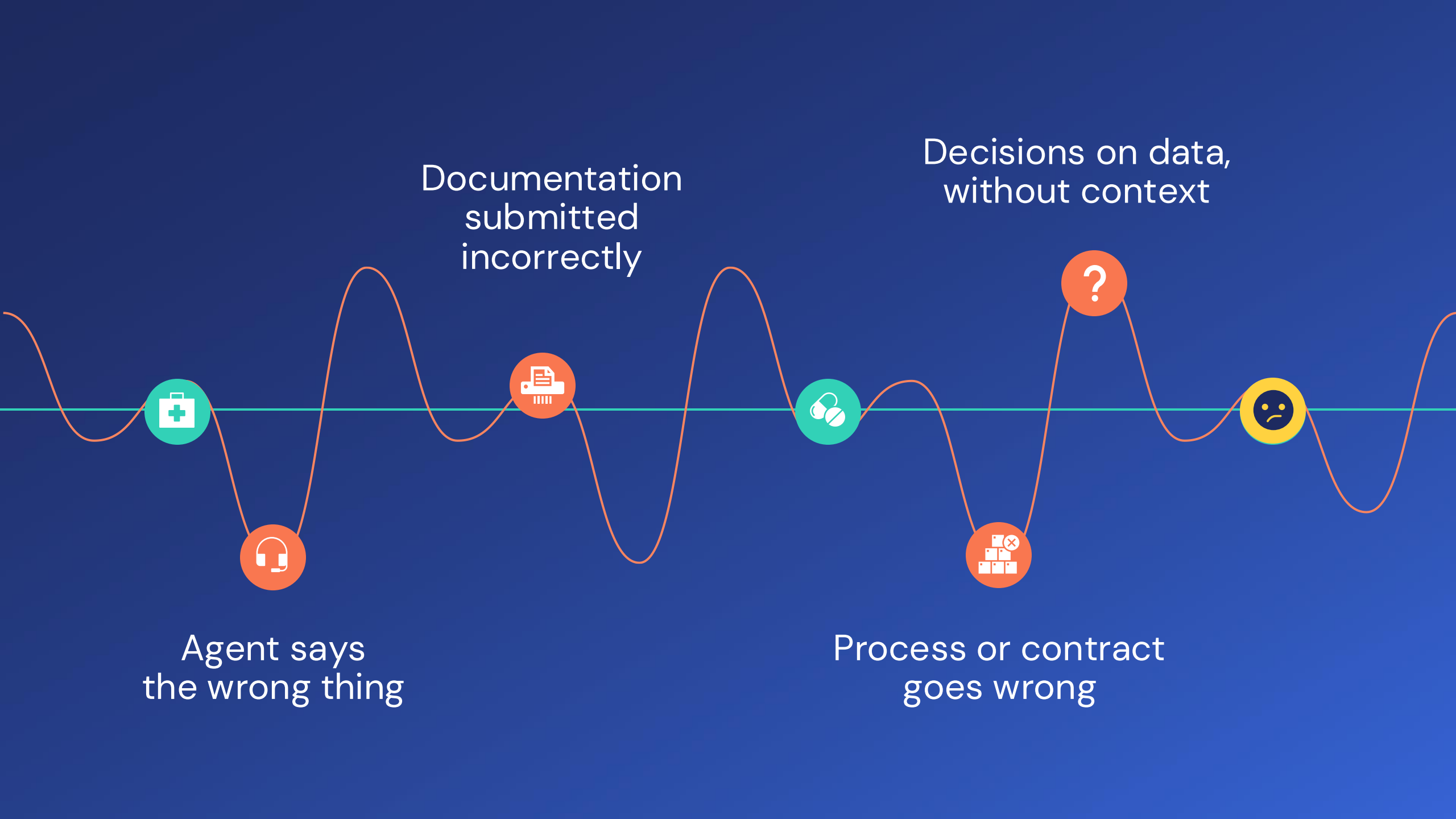
CIO JOURNAL

IBM CEO Says AI Has Replaced Hundreds of Workers but Created New Programming, Sales Jobs

The tech company promises higher total employment as it reinvests resources toward roles like software development

AI is already upending the corporate org chart as it flattens the distance between the C-suite and everyone else

BY BEATRICE NOLAN
TECH REPORTER



Agent says the wrong thing

Process or contract goes wrong

Documentation submitted incorrectly

Decisions on data, without context

How is our message received?

How well did we train the field?



CUSTOMER
VOICE

Are we on track to hit our revenue goals?

How well is our new care program working?

Reliable and durable

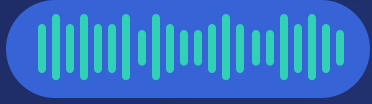
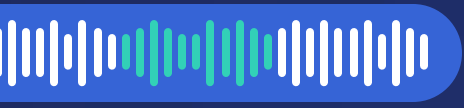
Powered by insights
that provide real signals



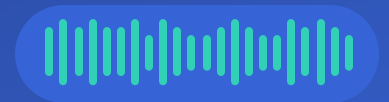
Provides real context

AI SUCCESS

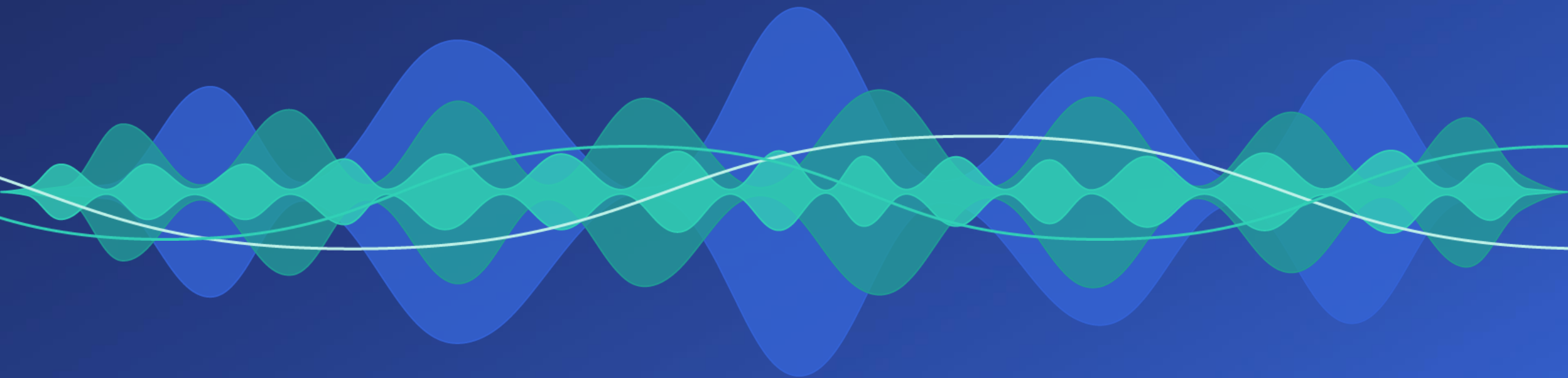
Creates focus for
purposeful work



The **role** of AI matters.



Activate the intelligence platform.



Intelligent Workforce

A decorative graphic consisting of several thin, overlapping wavy lines in shades of teal and light blue, positioned horizontally across the middle of the slide. Below these lines is a solid teal gradient bar that spans the width of the slide.

Impactful insights, coaching, and training for leadership & your team

- Favorites
 - Inbox 10613
 - Sent Items
 - Drafts 28
- eric.prugh@authen...
 - Inbox 10613
 - Voices 1**
 - Coda
 - Drafts 28
 - Sent Items
 - Snoozed
 - Deleted Items 1384
 - Junk Email 18
 - Notes
 - Archive 1569
 - Conversation Histo...
 - Search Folders
 - Go to Groups

- Voices
- Today
 - Eric Prugh
Authenticx insights: Tea... 11:06 AM
No preview is available.

Authenticx insights: Team Performance Dashboard

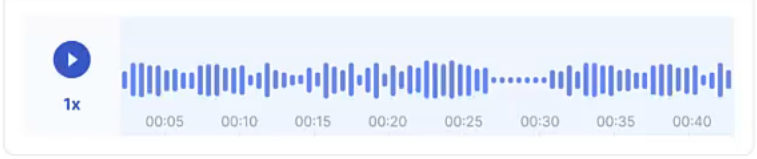
Authenticx Insights
To: Eric Prugh
Mon 9/8/2025 11:06 AM



Team Performance

Total Conversations: **2,790**
Conversations w/ Eddy: **19.10%**

Coachable Quality Moments 01:03 | 09/05/2025



Quality Scorecard Performance
Showcases how the team is doing across the board, including meets/does not meet.





Team Performance

+ Add Card



August 2025



8/15/2025

-

8/31/2025

Service Hierarchies

Clear

Apply

Cancel



Total Conversations

2,790

25%

Conversations with an Eddy

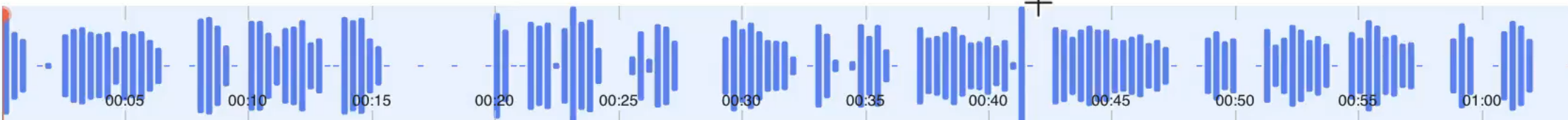
19.10%

2.2%

Coachable Quality Moments 01:03 | 09/05/2025



1x



Recent notes from KBo

There are examples of agents responding to customer inquiries by asking for demographic information or making procedural statements, such as verifying the customer's full name, rather than acknowledging the concern. Agents were documented as not providing ownership statements or expressing a willingness to help within 1-2 sentences after the inquiry, even when customers described side effects, denied authorizations, or issues with medication access. Several reasonings quoted agent responses like "I'm sorry to hear that" or redirected the customer to their doctor, but did not document immediate responsibility for the customer's issue.

Quality Scorecard Performance



Team Performance

+ Add Card



August 2025



8/15/2025

-

8/31/2025

Service Hierarchies

Clear

Apply



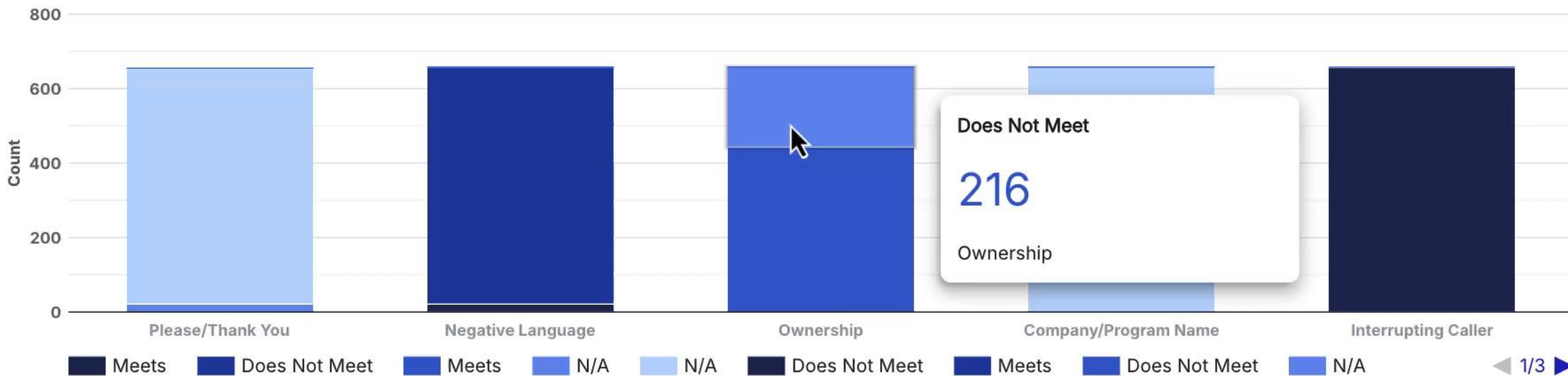
Quality Scorecard Performance

Showcases how the team is doing across the board, including meets/does not meet.

Standard Quality

%

#





Details

Interaction Date
08/31/2025

Additional Metadata

Evaluation #429

Standard Compliance
50

Call Risk Score
10

Standard Quality
75

[View Evaluation](#)

ML Classifiers

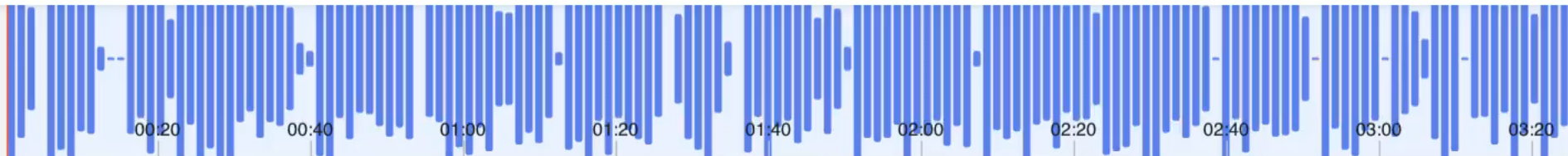
Patient

Sentiment Start: Neutral

Sentiment End: Neutral

HIPAA Compliant

Refer Treatment



1x

00:00 / 03:27

Highlights

Transcription

Clips

Results

Search within conversation...

Call Summary

The patient was calling because she received a denial notice in the mail for her prior authorization for her medication. The agent advised that the prior authorization was denied, provided instructions on how to submit an appeal. The agent also advised that she would send a clinical form request to the patient's prescribing physician via secure fax and once they return the completed form and any supporting documents, they will submit the appeal to the insurance company. The agent stated she would monitor the status of the appeal and call the patient back with an update.

Key Topics

Prior Authorization Denied

The majority of the call revolves around the patient's prior authorization being denied and the steps needed to appeal the decision.

Insurance Plan Information

The agent asks for the patient's insurance plan name and member ID to access their file.

Appeal Process

The agent explains the appeal process, including what information the physician needs to provide and the timeline for the appeal.

Interaction Details

Analyst
acxmachine@authenticx.com

[View Conversation Details](#)

Organization
Artek Pharma

Hub
Healthmet

Brand
Cosimex

Customer Type
Patient

Agent

Smart Predict View Reasoning

Does Not Meet **Meets**

Does the agent take responsibility of the customer's inquiry by providing an ownership statement?

Smart Predict View Reasoning

N/A **Does Not Meet** Meets

Does the agent demonstrate understanding of customer's concerns or barriers?

Smart Predict View Reasoning

N/A Does Not Meet **Meets**

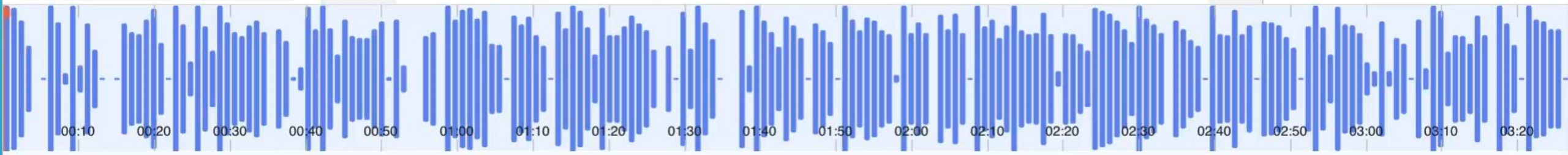
Does the agent proactively communicate next steps with the customer?

Clips

Sync tags with the evaluation



You haven't created any quotes



🔍 🔍 🔍 1x 00:00 / 03:27

[View Transcript](#)

Interaction Details



Analyst
acxmachine@authenticx.com

View Conversation Details

Organization
Artek Pharma
Hub
Healthmet
Brand
Cosimex

Customer Type

Patient

Agent

Smart Predict

View Reasoning

N/A

Does Not Meet

Meets



Does Not Meet Model Reasoning

Reasoning:

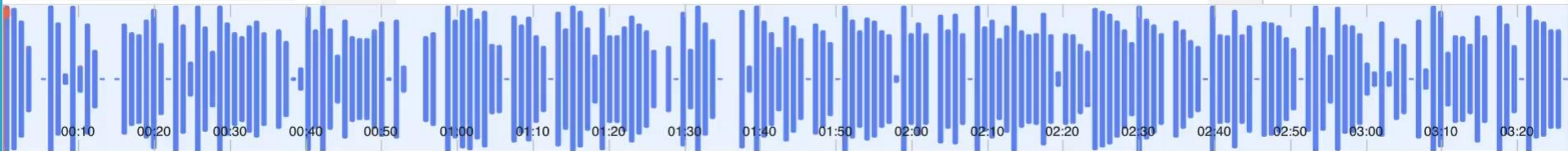
The customer inquired about the denial of a prior authorization for their medication, stating, "My doctor submitted a prior authorization for my new medication, but I just got a denial notice in the mail." The agent responded with empathy, saying, "I'm sorry to hear about the denial... Let me start by verifying your information so I can access your file." However, while the agent expressed empathy, they did not provide an ownership statement that indicates a willingness to help with the specific inquiry about the denial. The agent's response focused on gathering information rather than taking responsibility for addressing the customer's concern. Therefore, the agent's response does not meet the criteria for ownership.

Clips

Sync tags with the evaluation



You haven't created any quotes



1x 00:00 / 03:27

View Transcript



Team Performance

+ Add Card



August 2025



8/15/2025

8/31/2025

Service Hierarchies

Clear

Apply



Total Conversations

2,790

25%

Conversations with an Eddy

19.10%

2.2%

Coachable Quality Moments 01:03 | 09/05/2025



1x

00:05

00:10

00:15

00:20

00:25

00:30

00:35

00:40

00:45

00:50

00:55

01:00

Recent notes from KBo

There are examples of agents responding to customer inquiries by asking for demographic information or making procedural statements, such as verifying the customer's full name, rather than acknowledging the concern. Agents were documented as not providing ownership statements or expressing a willingness to help within 1-2 sentences after the inquiry, even when customers described side effects, denied authorizations, or issues with medication access. Several reasonings quoted agent responses like "I'm sorry to hear that" or redirected the customer to their doctor, but did not document immediate responsibility for the customer's issue.



Team Performance

+ Add Card



August 2025



8/15/2025

-

8/31/2025

Service Hierarchies

Clear

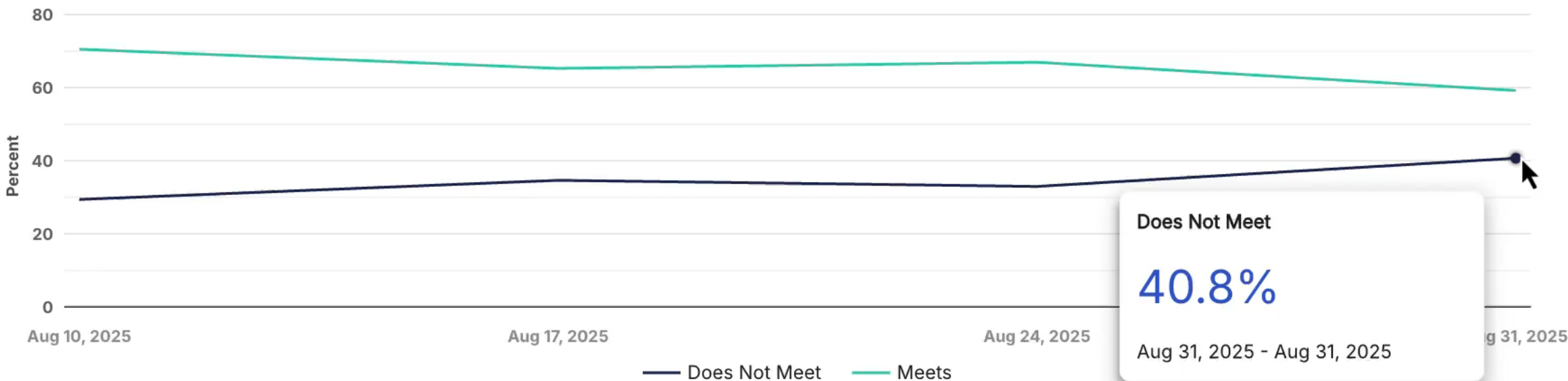
Apply



Ownership - Quality

%

#



ANALYZE WITH KBO



Copy



Refresh



Hide Insights

Analyze All Results

"Meets" model results documented agents acknowledging the customer's inquiry and expressing a willingness to help within 1-2 sentences, often using phrases like "I'd be happy to help," "Let me help," or "Let's get this sorted out." "Does Not Meet" model results cited agents responding with procedural information gathering, such as requesting personal or demographic details, or providing informative statements without expressing responsibility or willingness to assist, and lacking ownership statements within the required timeframe. No model results were marked as N/A or Partially Meets, and thus no evidence or conditions were documented for those categories.



Team Performance

+ Add Card



August 2025



8/15/2025

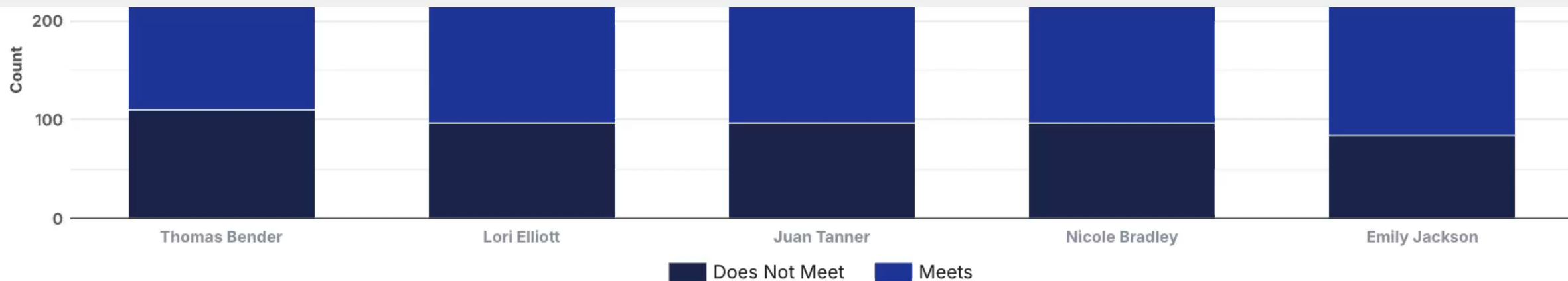
-

8/31/2025

Service Hierarchies

Clear

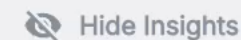
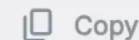
Apply



1-5 of 10



ANALYZE WITH KBO



Analyze Does Not Meet



The reasonings documented that agents typically responded to customer inquiries by asking for demographic or procedural information rather than providing ownership statements. Specific examples cited include agents requesting verification of names, dates of birth, or other personal details immediately after concerns about side effects, medication shipments, or copay issues were raised. Ownership statements expressing responsibility or willingness to help were noted as absent or delayed, with some only appearing after several exchanges rather than within 1-2 sentences of the inquiry.

Go Deeper



Team Performance

August 2025

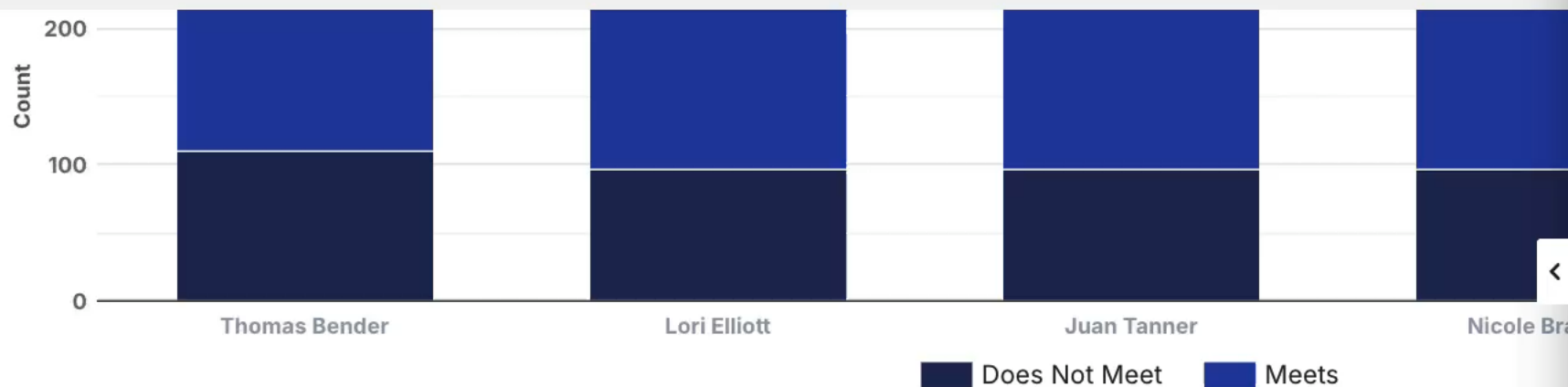


8/15/2025

-

8/31/2025

Service Hierarchies



ANALYZE WITH KBO

Analyze Does Not Meet

The reasonings documented that agents typically responded to customer inquiries by asking for demographic or procedural information rather than addressing the customer's concerns. Examples cited include agents requesting verification of names, dates of birth, or other personal details immediately after concerns about service issues were raised. Ownership statements expressing responsibility or willingness to help were noted as absent or delayed, with some only appearing within 1-2 sentences of the inquiry.

Go Deeper →



New Chat



Ownership Statement

Agents sometimes provided direct information or instructions, such as eligibility criteria or escalation procedures, but did not include an ownership statement that acknowledged the customer's concern or expressed a willingness to help. These informative responses were documented as not meeting the ownership criteria due to the absence of a clear statement of responsibility. [Example 1](#), [Example 2](#)



Show me these conversations in Conversation Explorer

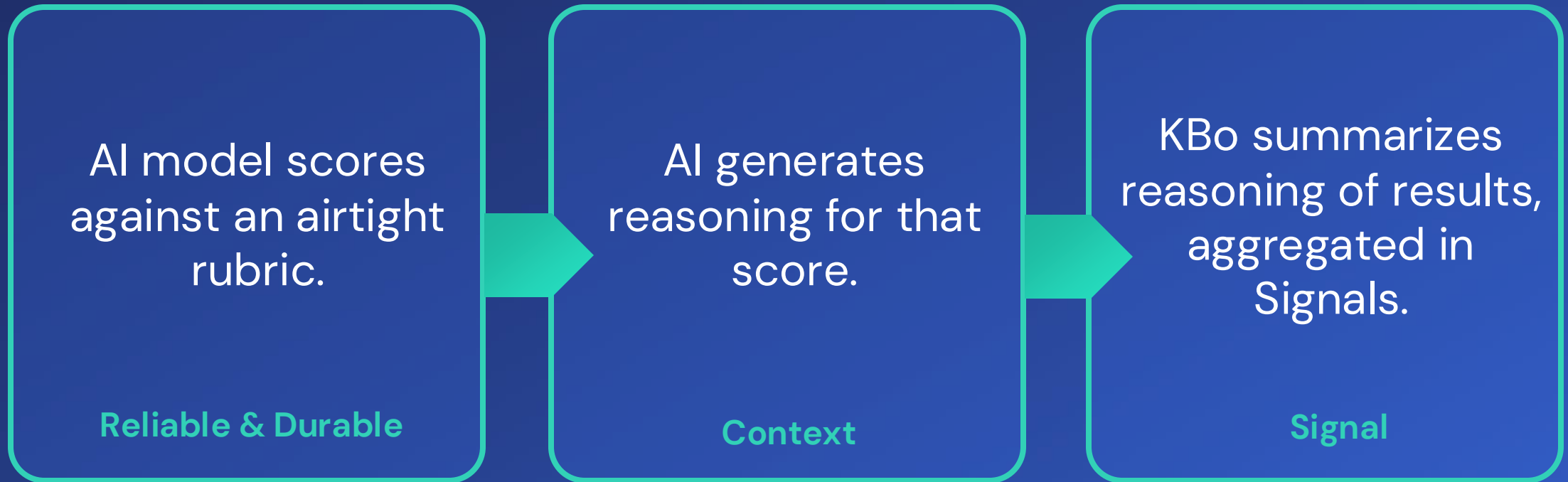
Select another result

Context: Applied Filters

What can I help you with?



New Quality Models





Quality Drill-down

+ Add Card ⋮

▼ August 2025 Drill-down ⊗
▼
📅 8/20/2025 - 8/30/2025
Service Hierarchies ▼
Apply 🚀

Total Conversations ⋮

2,905 📉 5%

Avg Call Duration with an Eddy ▼ ⋮

3m 3s → 0

Conversations with an Eddy ⋮

19.48% 📈 2.4%

Trending Topics

Use this report to see how topic volumes have changed within the selected time period.

Topic	Theme	Change	Percent	Volume
<u>Medication Side Effect</u>	Side Effect Management	📉 8%	<div style="width: 24%;"><div style="width: 24%;"></div></div> 24%	704
<u>Copay Card Issue</u>	Copay Card Management	📈 1%	<div style="width: 11%;"><div style="width: 11%;"></div></div> 11%	337
<u>Medication Authorization</u>	Medication And Prescription Man...	📉 5%	<div style="width: 6%;"><div style="width: 6%;"></div></div> 6%	199
<u>Prescription Issue</u>	Medication And Prescription Man...	📈 8%	<div style="width: 5%;"><div style="width: 5%;"></div></div> 5%	150
<u>Prior Authorization Denied</u>	Authorization And Access Manag...	📈 53%	<div style="width: 4%;"><div style="width: 4%;"></div></div> 4%	124
<u>Medication Shipment</u>	Medication And Prescription Man...	📉 26%	<div style="width: 3%;"><div style="width: 3%;"></div></div> 3%	115

Owning the Conversation: A Step-by-Step Guide for Prior Authorization Calls

Audience: Contact Center agents handling prior authorization (PA) inquiries.

Goal: Increase first-call resolution perception and customer confidence by using clear ownership statements, action steps, and timely follow-through.

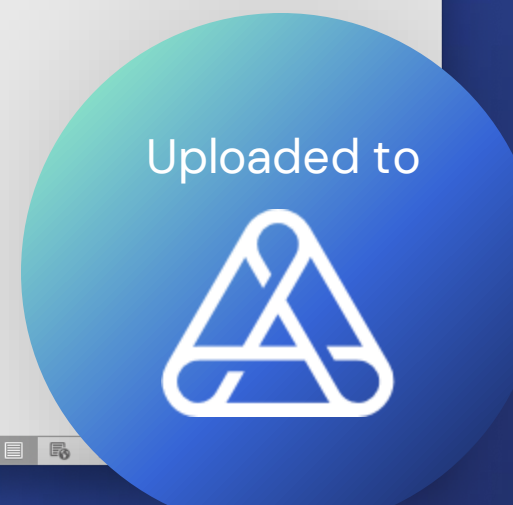
1) What "Ownership" Means

Ownership is how we demonstrate to callers that we are responsible for driving their PA issue to the next meaningful step. It's expressed through language ("I will..."), behavior (timebound actions), and follow-through (documenting and closing the loop).

Five Principles of Ownership

- Make it personal: say "I" and use the caller's name when appropriate.
- Acknowledge fast: within 1-2 sentences, state willingness to help and the immediate next step.
- Describe actions: tell the caller exactly what you will do and when you'll do it.
- Set timeframes: give realistic, specific time commitments and update if anything changes.
- Close the loop: recap decisions, confirm next steps, and provide a reference/ticket number.

2) Step-by-Step Call Flow with Example Scripts





KBo

Hello I'm KBo! How can I assist you today?

[Safety Event Procedure](#)

[Prior Authorization Guide](#)

What can I help you with? ▶

Voice Call [+18502078577](#) Edit Share Voice Call Delete

Related Record	Call Started	Call Duration
+ Add	7/29/2025, 12:35 PM	00:02:47

Notes: Improve Empathy!

Notes: Improve Empathy! ▶

Previous Call Details

Agent	Interaction Date
Duration	Eddy Effect
2min 57sec	False

Call Summary

The agent called a patient to provide them with their benefit verification summary. The agent explained that the patient's plan covered after their deductible and that a prior authorization was required. The agent stated that the patient may qualify for a copay assistance program if eligible. The patient stated they'd complete the co-pay assistance enrollment form and that they'd receive an email once they hear back from the prior authorization department.

Insights

Predicted Sentiment

Predicted Sentiment ▶

Patient Summary

Patient Summary ▶

Intelligent Workforce → What you saw

New Quality Models

- 20 pre-packaged models*
- Model reasoning
- KBo summary & analysis
- Customizable on request

Authenticx for Salesforce

- Install via AppExchange
- Train on documentation
- AI for customer context

KBo, Emails, & Sharing

- KBo chat history & UX
- Shareable dashboards
- Automated emails (Oct.)

* More on rubrics in Grace & Emir's session!

Intelligent Processes

A decorative graphic consisting of a series of overlapping, semi-transparent teal wave shapes that span horizontally across the middle of the slide.

Automate and validate critical workflows you rely on

71% of Gen Z respondents
believe **live calls** are the **quickest &**
easiest way to explain their issues.

Source: McKinsey

57% of **customer care leaders**
expect call volumes to increase
in the next 1-2 years.

Source: McKinsey

Waste of Process

Data Entry



System Design



QA & IT Support



Without data entry, how will
they know **what info to ask?**

Source: McKinsey

KBo

Hello I'm KBo! How can I assist you today?

Adverse Event Reporting Questions

Prior Authorization Guide

What can I help you with?

Voice Call **+18502078577** [Edit] [Share Voice Call] [Delete]

Related Record	Call Started	Call Duration	Call Type
+ Add	7/29/2025, 12:35 PM	00:02:47	Inbound

Notes: Improve Empathy!

Notes: Improve Empathy!

- Actively Listen:** Focus on the customer's words and tone to fully understand their concerns without interruption.
- Acknowledge Feelings:** Use empathetic phrases like "I understand how frustrating this must be" to validate their emotions.
- Clarify and Confirm:** Summarize their issue to ensure accuracy and show you're engaged in resolving it.

Previous Call Details

Agent	Interaction Date
Duration	Eddy Effect
Call Summary	

Insights

Predicted Sentiment

Predicted Sentiment

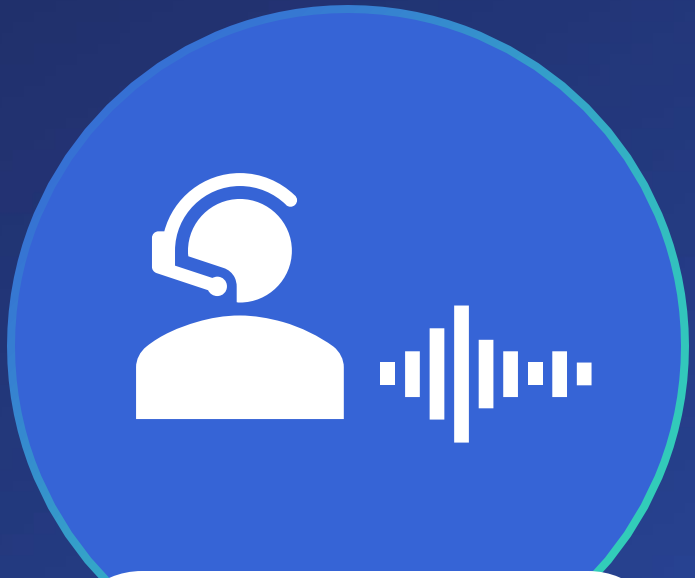
The sentiment of the caller has shifted over time. Initially, it was neutral, but recent interactions indicate increasing frustration due to unresolved issues related to medication and insurance.

Patient Summary

Patient Summary

Here's a summary of previous interactions:

- Insurance and Authorization Delays:** Patients expressed frustration with delays in insurance coverage verification, prior authorizations, and medication approvals, affecting continuity of care.
- Payment and Co-Pay Assistance:** Concerns about high co-pays, eligibility for assistance programs, and confusion over out-of-pocket expenses were common.
- Shipment Issues:** Delays and rescheduling of medication deliveries caused inconvenience, with patients seeking better communication and solutions.



LIVE

Can you describe your symptoms?

Can we contact you for a follow up?

What's the lot number of the medication?

Has the issue resolved itself since it occurred?



Compliance & Safety Event Monitoring

+ Add Card



▼ August 2025: Compliance



8/1/2025

-

8/30/2025

Service Hierarchies



Clear

Apply



Adverse Event: Present



Total Conversations



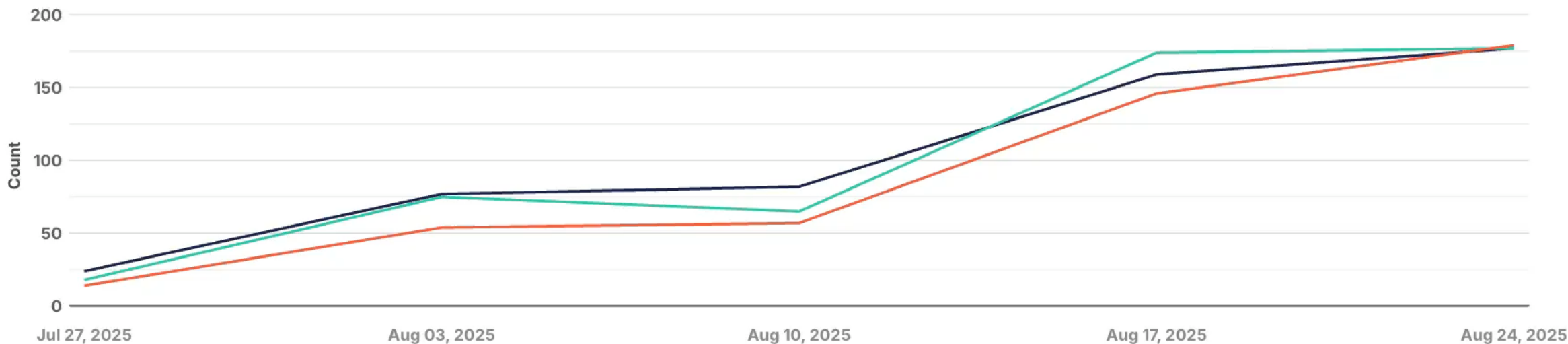
1,478



139%

Safety Events by Brand - Weekly

Trends of Safety Events discovered by brand.





Workflows

My Organization

Me

Select Hierarchy



Select Created On Date Range

Hide Closed Workflows

7/10/2025 - 9/8/2025



Cancel

Reopen

Filter



<input type="checkbox"/>	Workflow	Status	High Pr... ↓	Question Category	Workflow Recipients
<input type="checkbox"/>	View	In Progress	!		connor.billing@authenticx.com
<input type="checkbox"/>	View	In Progress	!		connor.billing@authenticx.com
<input type="checkbox"/>	View	In Progress	!		connor.billing@authenticx.com
<input type="checkbox"/>	View	In Progress	!		connor.billing@authenticx.com
<input type="checkbox"/>	View	In Progress	!		connor.billing@authenticx.com
<input type="checkbox"/>	View	In Progress	!		connor.billing@authenticx.com

Total Rows: 3,614

Workflow Overview Priority

3,614 **Priority** 0 **Normal**

^ Safety Event Signals

1 Safety Event Signal found in this conversation

Speaker 2
01:03

I started it about 5 days ago, on the 1st of the month.

Safety Event

Speaker
01:08

Could you describe the rash and how Severe the itching has been?

Safety Event

Speaker 2
01:15

I 've developed red patches on my arms and torso that are quite itchy. It's keeping me up at

Safety Event

Speaker
01:23

Thank you for sharing that. Have you stopped taking the medication since the symptoms began?

Safety Event

Speaker 2
01:30

Yes. I skipped my dose this morning because the itching was so bad.

Safety Event

Extracted
& Stored



🌟 Patient info: Extracted

🌟 Start date: 9/1/2025

🌟 Description: Rash

🌟 Contact consent: Yes

Intelligent Safety Event Process





Results Compliance Teams Love

Automation built to be trusted by compliance

PERFORMANCE OF
ADVERSE EVENT MODEL

↗ **98%+**

Accuracy (Agreement)

PERFORMANCE OF
CUSTOMIZED MODELS

↗ **15%+**

Improvement over humans

COST BENEFIT
& IMPACT

\$1M+

Potential savings



INTELLIGENT PROCESSES

Pharma Manufacturing	
Treatment Disruption	Trigger escalations on treatment issues
Product Quality Insights	Automated PQC reporting workflow
Enrollment Data Capture	Automated data entry on other workflows like enrollment or PAs
All Healthcare	
Service Recovery	Escalate poor service interactions, patient leakage, or disenrollment to service recovery teams
Compliance Observations	Escalate consent gaps (HIPAA & recording)
Potential Grievance Alerts	Surface potential grievances proactively

Intelligent Process → What you saw

Compliance Automation

Detect compliance events
(Safety Events, etc.)

KBo for Agents to
streamline SOPs on calls

Data Entry Automation

Extract supporting
data automatically

Connectors to systems of
record (Salesforce, Veeva)

AI-Triggered Workflows (Q4)

Trigger workflows on
all AI model results

Trigger emails & data

Reconciliation API

Intelligent Metrics

A decorative graphic consisting of several overlapping, smooth, wavy lines in shades of blue and teal, creating a sense of motion and depth across the middle of the slide.

Establish new metrics to respond & prioritize with agility and urgency

Legacy KPIs are built on **lagging data**
and **low survey response rates**.



Details

Agent
James Morris

Organization
Artek Pharma

Hub
Sonexus

Brand
Syrocor

Call Direction
Outbound

Call Duration
03:37

Interaction Date
08/30/2025

Additional Metadata

Conversation Details



Evaluate

Label



Find similar conversations



1x

00:00 / 03:37

Highlights

Transcription

Clips

Results

started



Call Summary

The patient was calling because she went to the pharmacy and her copay card declined when they tried to process her prescription. The agent advised that the card declined due to a system connectivity issue with the card processor. The agent provided the patient with a temporary authorization code to give to the pharmacy. The agent also advised that she would reissue a new digital copay card to the patient's email address and escalate the issue to the copay program team. The agent informed the patient that the system may not process right away because of the outage at the pharmacy. Patient asks how long the system will be down and the agent advised it could take 2-5 hours for the system to be back online. The agent stated that she would follow up with the patient once the system is back online.



Intelligent Metrics

+ Add Card



Intelligent Metrics



8/1/2025

-

8/30/2025

Service Hierarchies



Apply



Total Conversations



5,185



129%

Avg Call Duration with an Eddy



3m 4s



1s

Conversations with an Eddy



23.14%



38.9%

Customer Risk Score

Assess opportunities to improve overall risk, and trigger workflows for higher risk.



Call Risk Score



%

#

100





REPEAT CALLER

QUESTION

Did the caller previously call about this issue?*

RESULTS

✦ YES

✦ NO

REASONING

AI explains why the results were chosen, citing the rubric and model instructions

* A strong, objective rubric is required.



Signals

Conversations

My Evaluations

Workflows

Montage Library

Interactions

Agents



Find Eval by #



Classifier Library

Your Classifiers

Classifier Builder

Model Library

Your Models

Model Builder

Model Library

Search models...

Standard Quality

Add All



Transfer Protocol - Quality

Does the agent follow transfer protocol?

Version 1 | 8/18/25

Add



Agent First Name - Quality

Does the agent identify themselves by First name during the greeting?

Version 3 | 9/5/25

Add



Speaking Manner/Pace - Quality

Does the agent speak in a manner and pace that is easily understandable, which is made clear by the customer not asking the agent to repeat themselves or to provide clarity?

Version 1 | 8/18/25

Add



Agent Preparedness - Quality

Does the agent demonstrate preparedness for the call?

Version 1 | 8/18/25

Add



Company/Program Name - Quality

Does the agent state the



Any Questions? - Quality

Does the agent ask the customer if they have any



Offer Assistance - Quality

Does the agent ask how



Demonstrates Understanding - Quality

Does the agent

Workforce

94% of Gen Z &
92% of Millennials
consider **meaningful
work a top priority**

Deloitte



PURPOSE

New Survey Shows Purpose Drives Employee Engagement And AI Adoption

By [Chris Westfall](#), Contributor. © Guidance for
leaders and aspiring leaders, interested in...

[Follow Author](#)

Published May 01, 2025 at 09:30am EDT

- Activity
- Chat 2
- Calendar
- Calls
- OneDrive
- Jira Cloud
- Bookings
- Meet
- Copilot
- Planner
- ...
- Apps

What can I help you with?



Message Copilot

+

List key points from CAB.pptx
Understand the main points

Draft an email to my team asking for feedback on 2025-...
Ask for input

Suggest 10 compelling titles for 2025-H2 Customer-facing...
Let's brainstorm

[See more](#) ▾

- ### Copilot
- Agents
- KBo for Copilot
 - Jira Cloud
- Get agents
- Create an agent
-
- ### Chats
- Previous 30 Days
- Tell me about Billing and Accoun...
- July
- List key points from 2025-07 BC...
 - Tell me more about \"I've sent a ...
 - can you schedule meetings
- June
- can you direct me to documenta...
- [See more](#)

Intelligent Process → What you saw

Model Builder for Insights

Custom insights with
context & new signals

Real-time analytics &
insights with KBo

Insights Model Library

Pre-packaged, designed
for healthcare

Includes reasoning, charts,
and KBo integration

KBo for Copilot (2026)

Surface customer voice
insights in Copilot

Connect to Authenticx
data in Teams or
PowerPoint

INTELLIGENT WORKFORCE



RECENTLY RELEASED

New Quality models

Authenticx for Salesforce

KBo insights on models

COMING SOON

Dashboard email alerts

INTELLIGENT PROCESSES



RECENTLY RELEASED

Compliance detection

KBo for Agents

COMING SOON

AI-triggered workflows (Q4)

INTELLIGENT METRICS



RECENTLY RELEASED

Model Builder for Insights

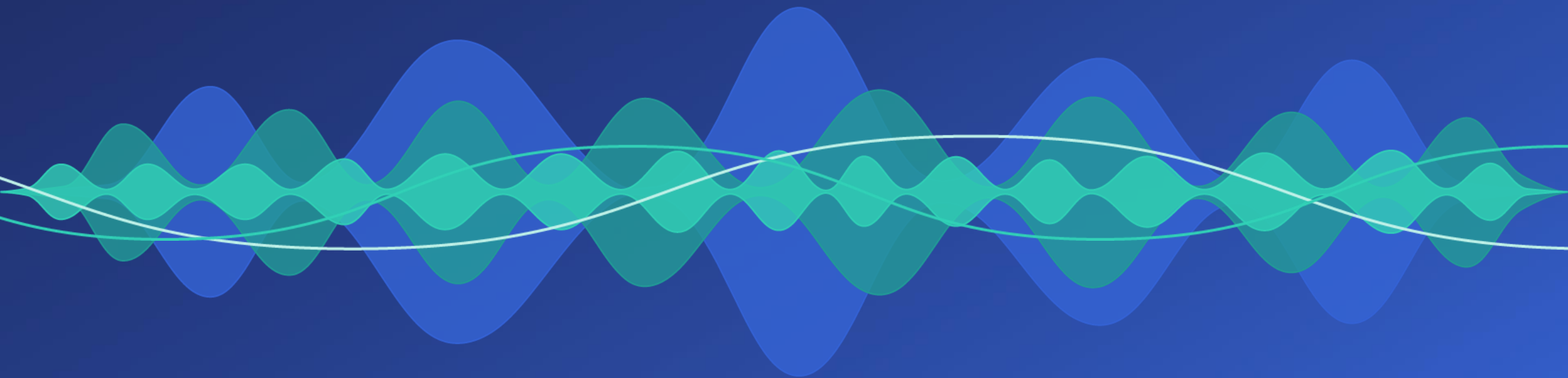
Insights Model Library

Pre-packaged models

COMING SOON

KBo for Copilot (talk to us!)

Activate the intelligence platform



FROM STORY TO ACTION

Sally Perkins, PhD
Sr. Manager of Storytellers
Authenticx



Leadership is about . . .

Influence

Motivation

Action

Leadership is about . . .

STORYTELLING

Chapters

1 Your Brain on Stories

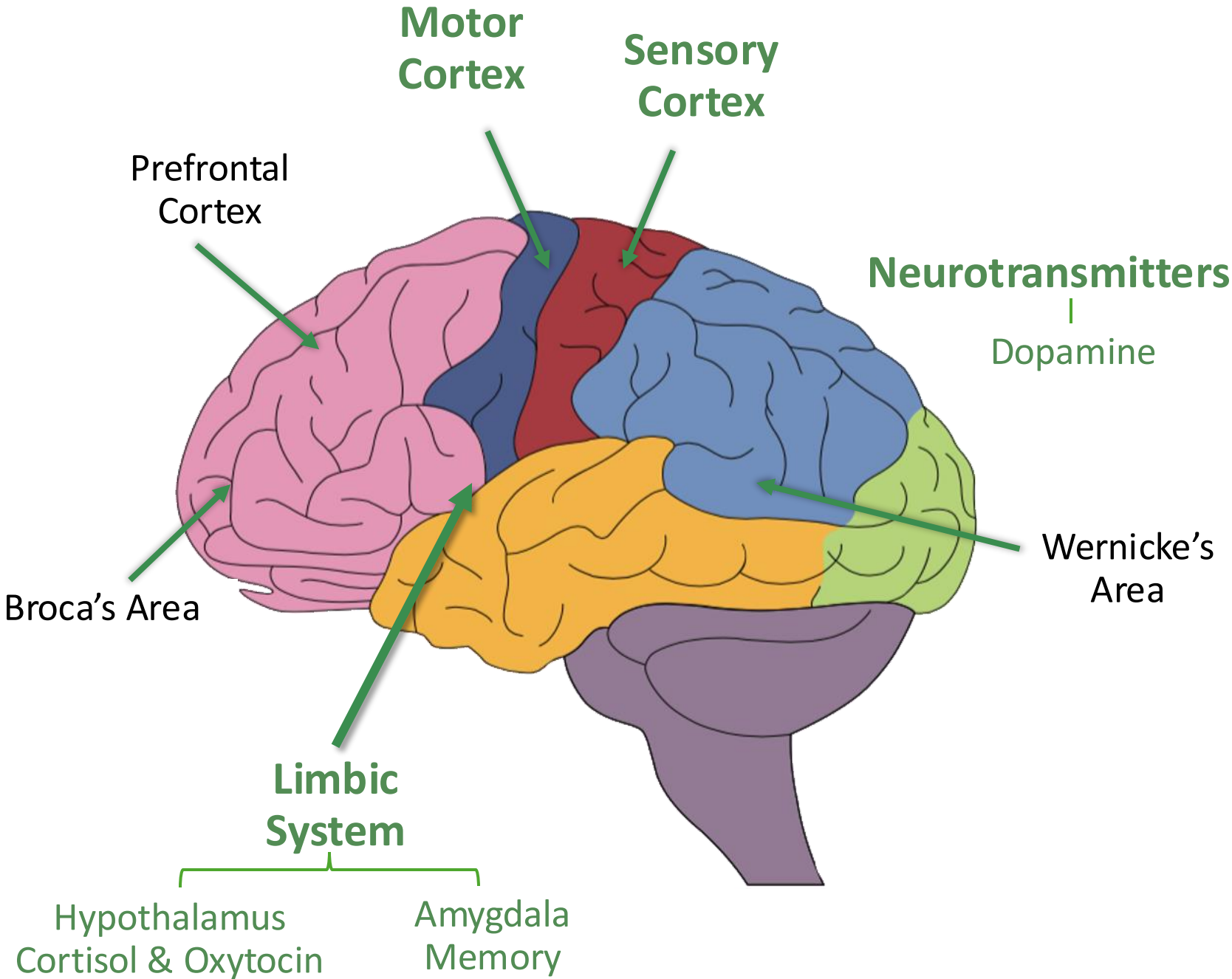
2 Not Everything's a Story

3 Scoping a Story for Impact

4 Finished &
Unfinished Stories



The Brain Making Decisions



Tree Tales



Forest Stories



What Story Type Are You Telling?

Finished



Unfinished



FROM STORY TO ACTION



Sally Perkins, PhD

Sr. Manager
of Storytellers

Authenticx



Sally J. Perkins, PhD

From STORY to ACTION

Transform Your Storytelling to
Win Support and Ignite Change

*You and your organization have so much to offer —
if only you knew how to inspire and persuade
the right people to support your cause.*

No matter how much impactful data you've provided, or how many times you've told your story, your audiences just don't seem inspired by your message. What's going wrong?

The key is telling the *right kind* of story in the most compelling way, using neuroscience-backed techniques that engage all decision-making facets of your audiences' brains.

That may sound complicated, but it's not! In *From Story to Action*, Dr. Sally Perkins has distilled the science into simple-to-use frameworks you can use to start telling impactful stories right away.

You'll learn how to:

- Select the right **Story Type** for your audience
- Use a **Story Loop** structure that captivates and drives action
- Develop **Tree Tales** with intimate appeal
- Develop **Forest Stories** with big-picture, data-driven impact
- And so much more!

If your noble cause is brimming with amazing tales of transformation — or stories to spark more of it — this book will make the job of telling them so much easier.

WITH MORE THAN 30 YEARS of experience as a story performer, data-backed storyteller, and storytelling coach, storyteller **Dr. Sally Perkins** has equipped hundreds of organizations and individuals of all types and storytelling backgrounds to connect with audiences and spark positive action.



Drive Meaningful Action with Data-Backed Storytelling

How to weave Forest and Tree Tales together to inspire change

Phil Lofton & Abigail Rainey
Senior Insight Storytellers

The Importance of Data

- Improve Patient Outcomes
- Cost Management and Efficiency
- Regulatory Compliance and Safety
- Innovation
- Strategic Decision Making

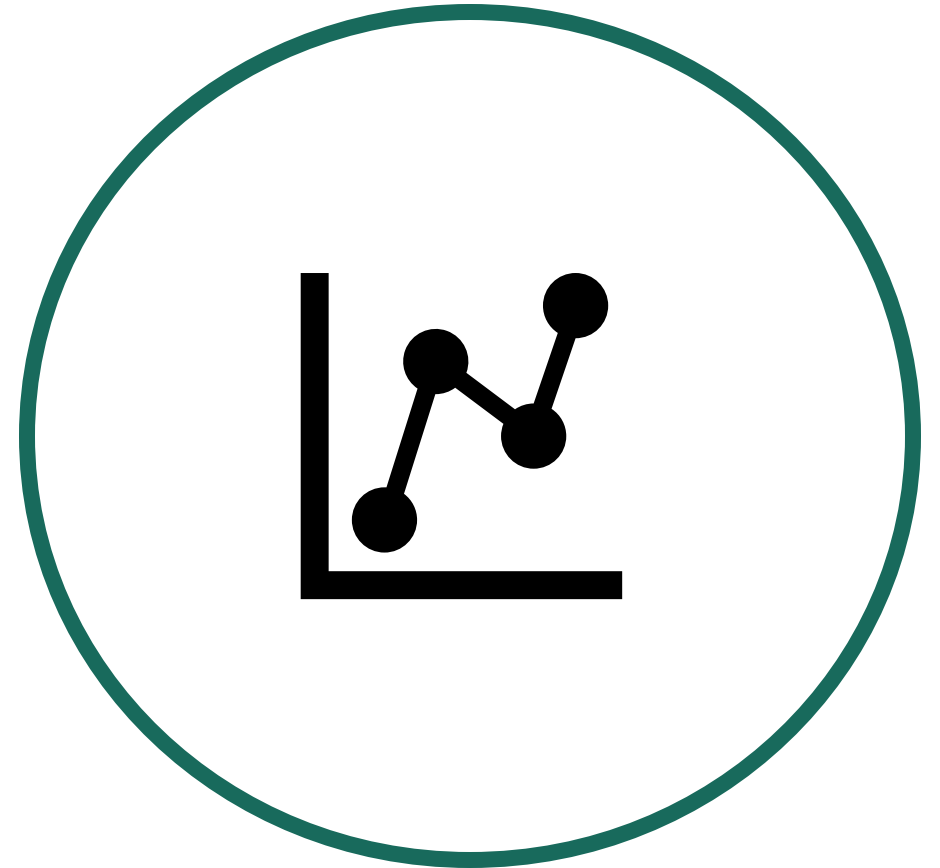


You need **more than numbers** to change priorities, budgets and hearts—you need a **story** that connects

“Data-Backed Storytelling matters because **it doesn't just tell you the facts**. It tells you *why those facts matter*, and it lets you hear the voice of **who gets affected most**”

-Authenticx Client

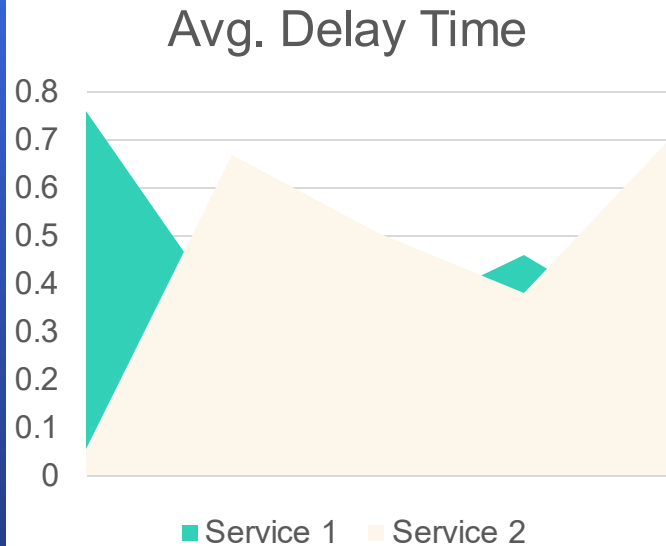
Version 1: The Data Dump



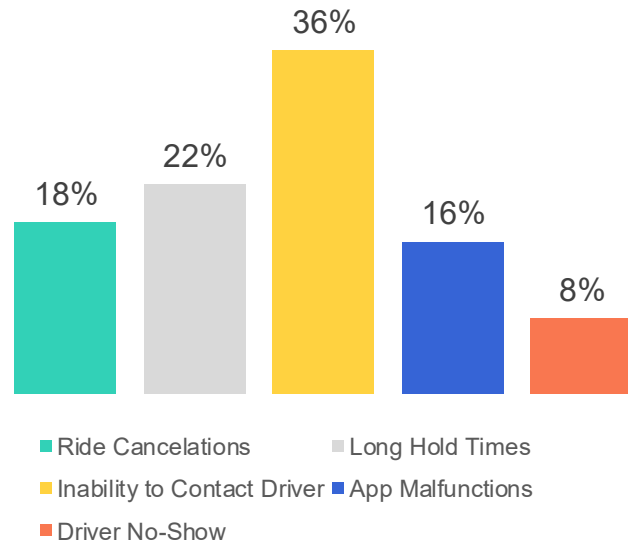
Q1 Medicaid Transportation Report

129,566

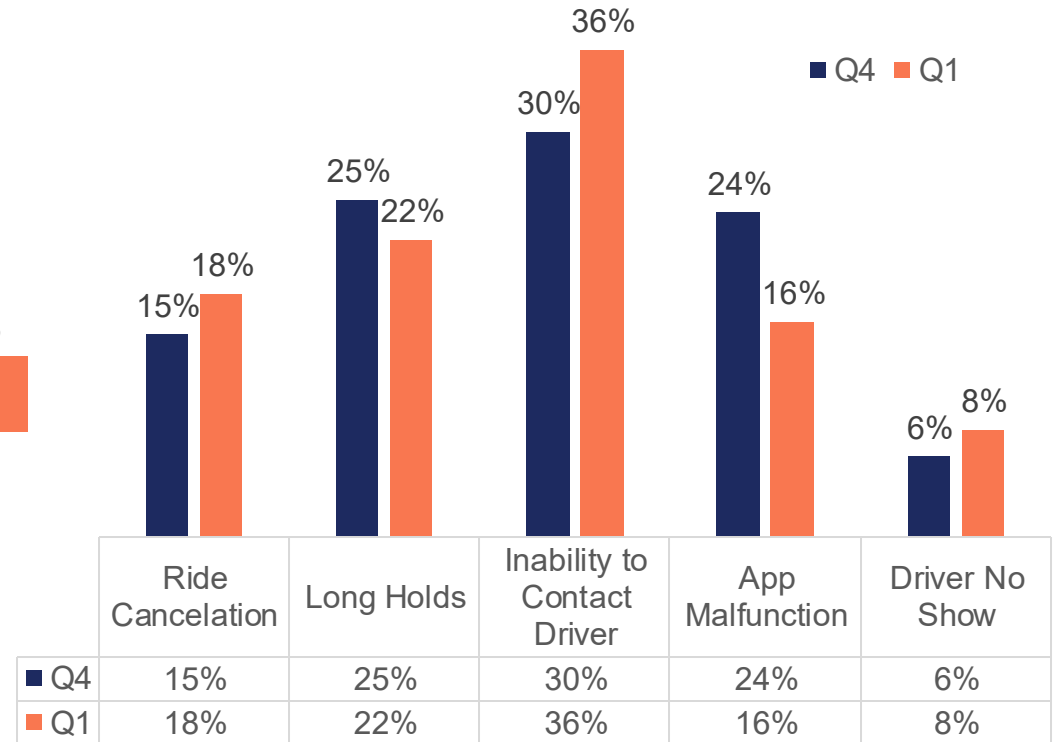
Rides Provided
1/1/25-3/31/25



Q1 Medicaid Transportation Themes

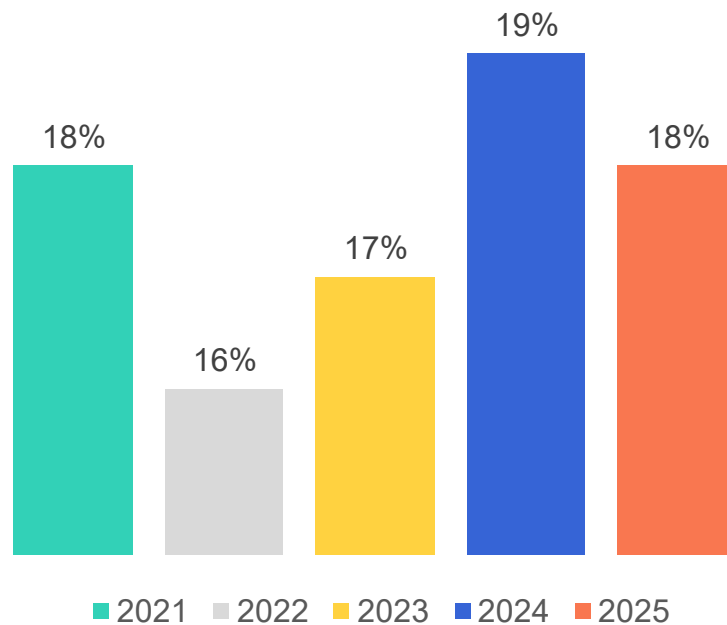


Q4 and Q1 Comparison

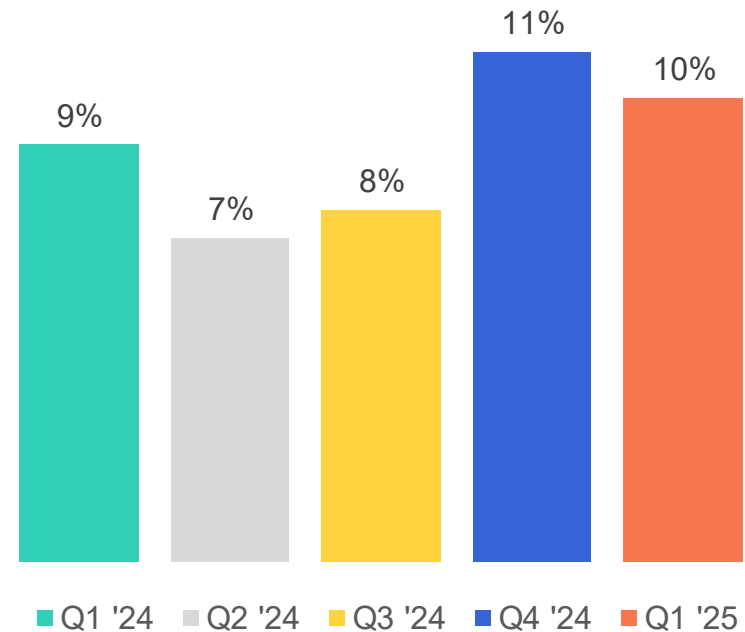


Q1 Medicaid Transportation Report

% of Medicaid Patients YoY



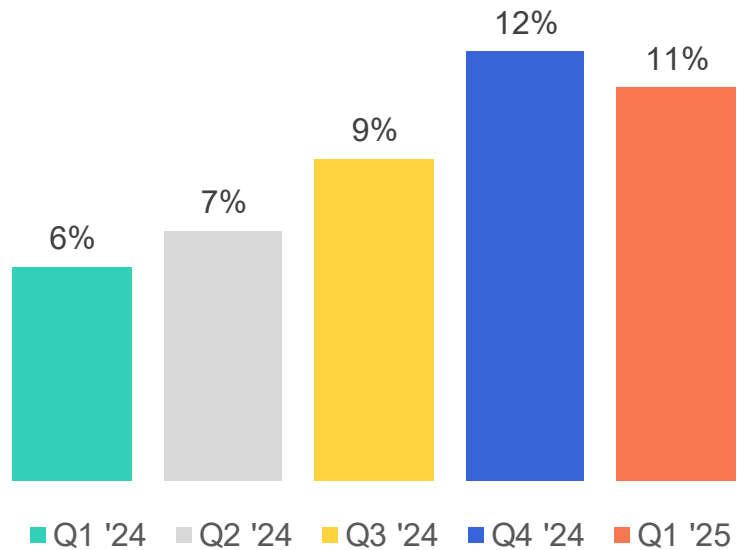
% of Rescheduled Appointments



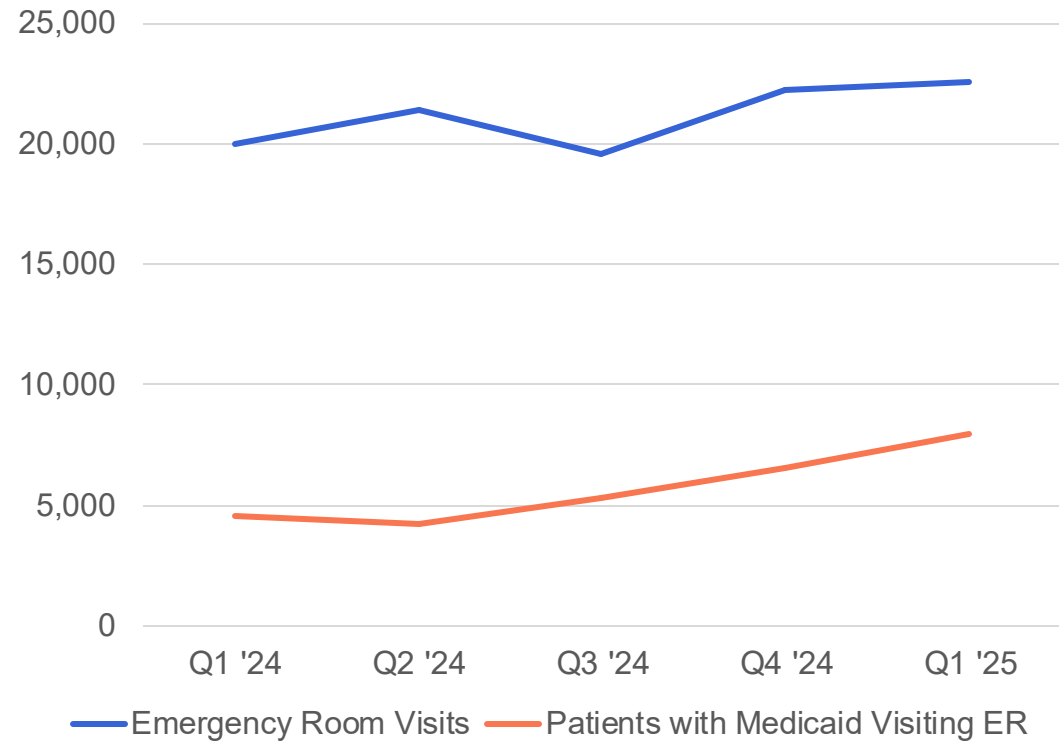
Average Satisfaction Score: 3.8/5

Q1 Medicaid Transportation Report

% of “No Call, No Show”
Appointments



Emergency Room Visits QoQ

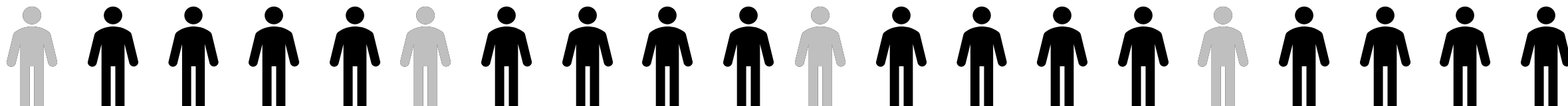


Version 1: What Now?

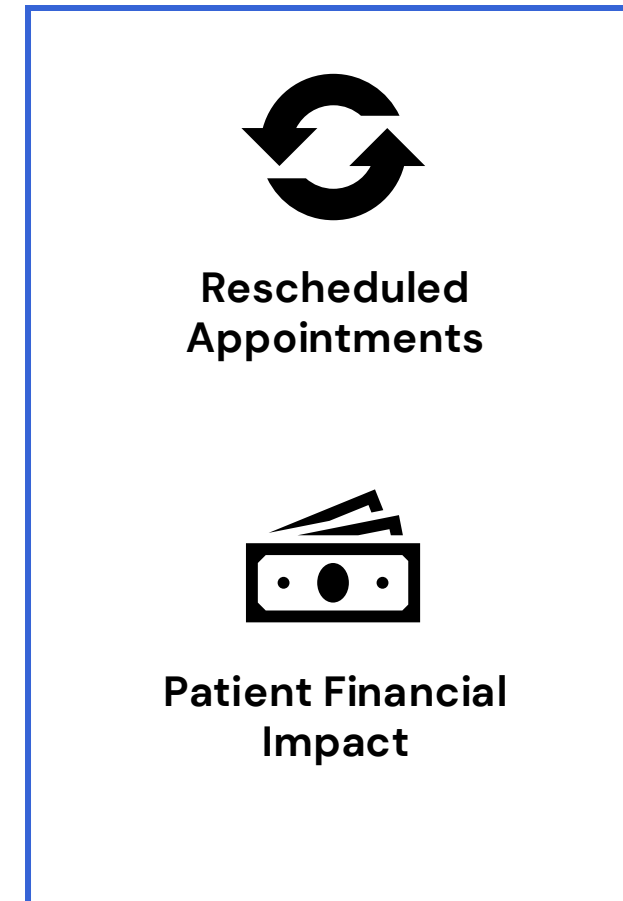
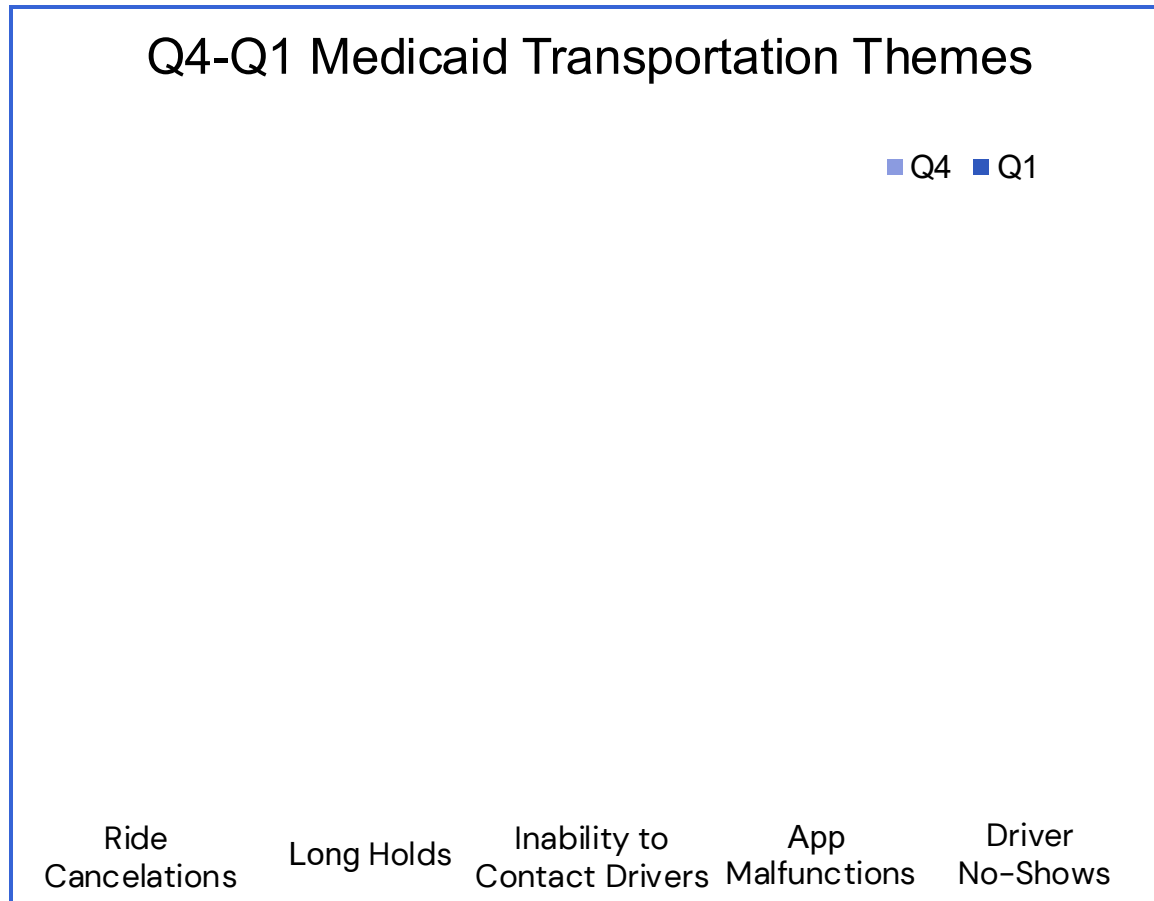
Version 2:
The Story that Drives
Action



One in Five Patients on Medicaid Experienced Difficulty with Medicaid Transportation in Q1



Transportation Issues Problem



Delay In Care: The Problem

Patients on Medicaid lack **consistent transportation**

AND

the **ability to access** reliable solutions

LEADING TO

preventable *delay in care*

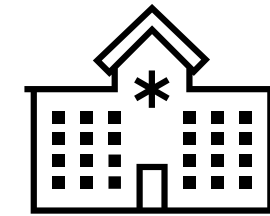
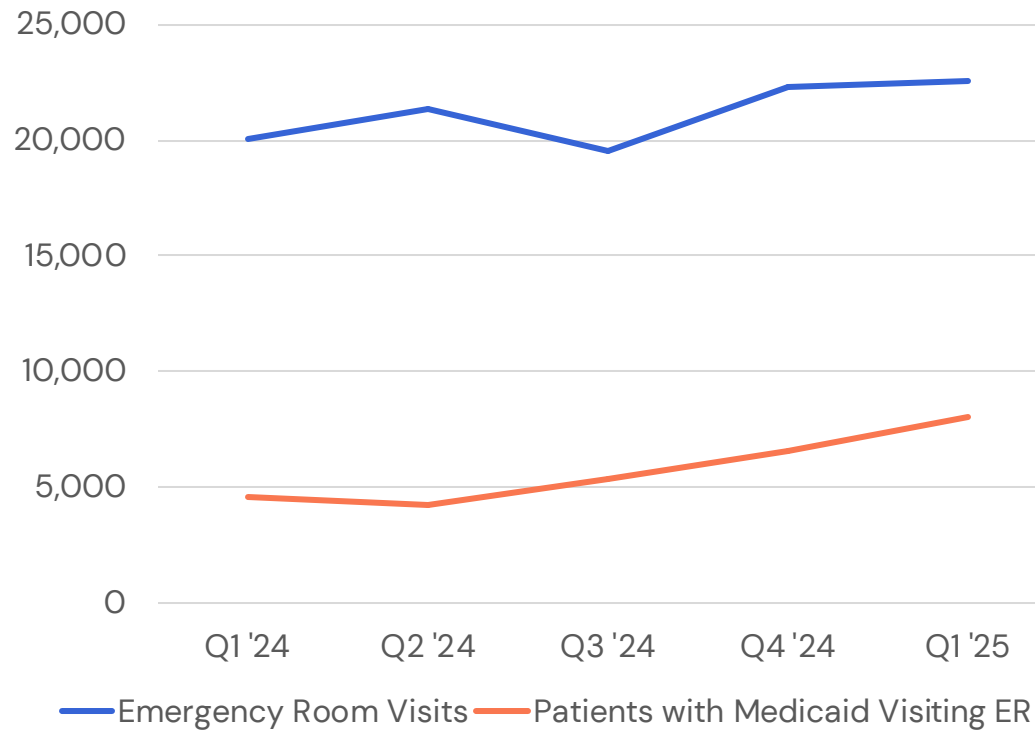
Delay In Care:

Impact



Patients on Medicaid lack **consistent transportation** AND the **ability to access** reliable solutions leading to a **preventable delay in care**

Emergency Room Visits QoQ



35%

of patients on Medicaid with a *delay in care due to transportation* end up with an **avoidable ER visit**

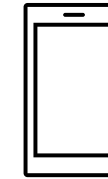
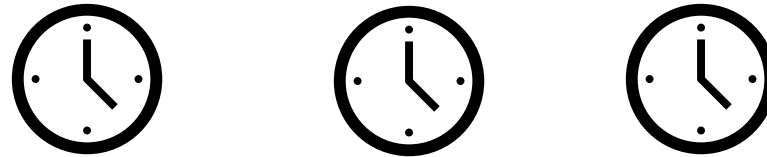
Personal Impact:

Fluid Overload

Patients on Medicaid lack **consistent transportation** AND the **ability to access** reliable solutions leading to a **preventable delay in care**



Medicaid drivers did not show up for our patients **8%** of the time and were unreachable **16%** of the time



Our App malfunctioned **18%** of the time preventing clear communication and notices

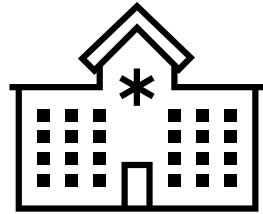
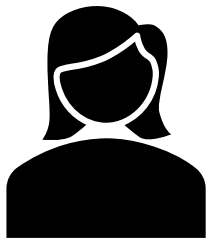


35% of those with a delay in care due to transportation ended up in the ER

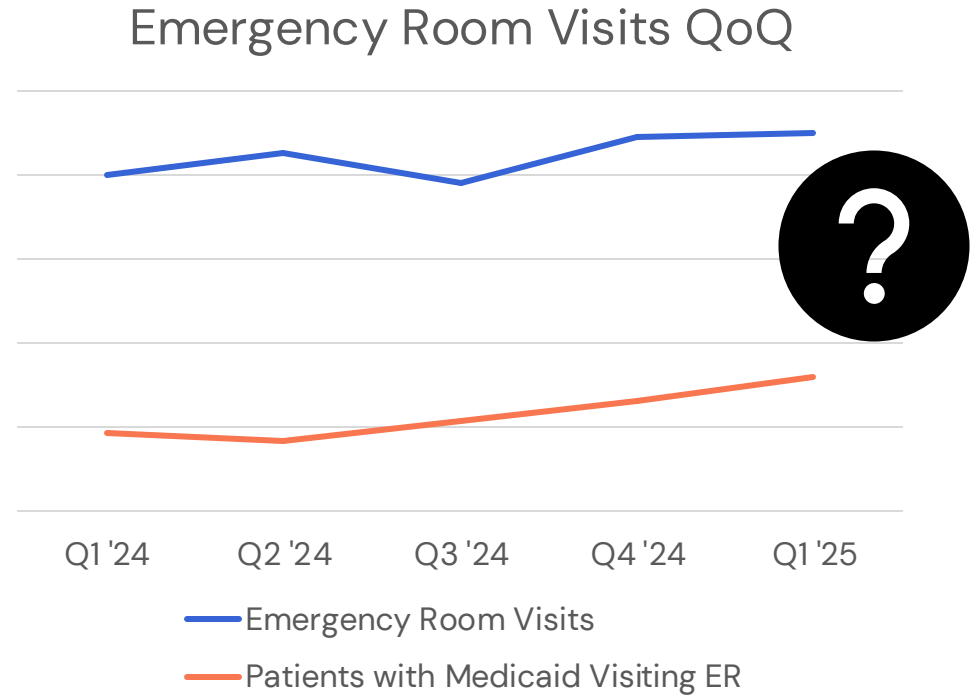
Delay In Care: Impact



Patients on Medicaid lack **consistent transportation** AND the **ability to access** reliable solutions leading to a **preventable delay in care**



35%
of patients on Medicaid with
a *delay in care due to*
transportation end up with
an **avoidable ER visit**



Helping One in Five



Patients on Medicaid lack **consistent transportation**
AND the **ability to access** reliable solutions leading to a **preventable delay in care**



How do we help the "Mrs. Carters" of our organization?

Who else needs to hear Mrs. Carter's story?

What is the risk of **not prioritizing** this?

Version 2: What Now?



Why should YOU tell a story that inspires action?

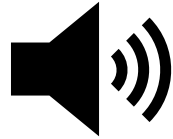


How do YOU tell a story that inspires action?



The Road to Meaningful Action

Narrate the Impact



Name the Problem



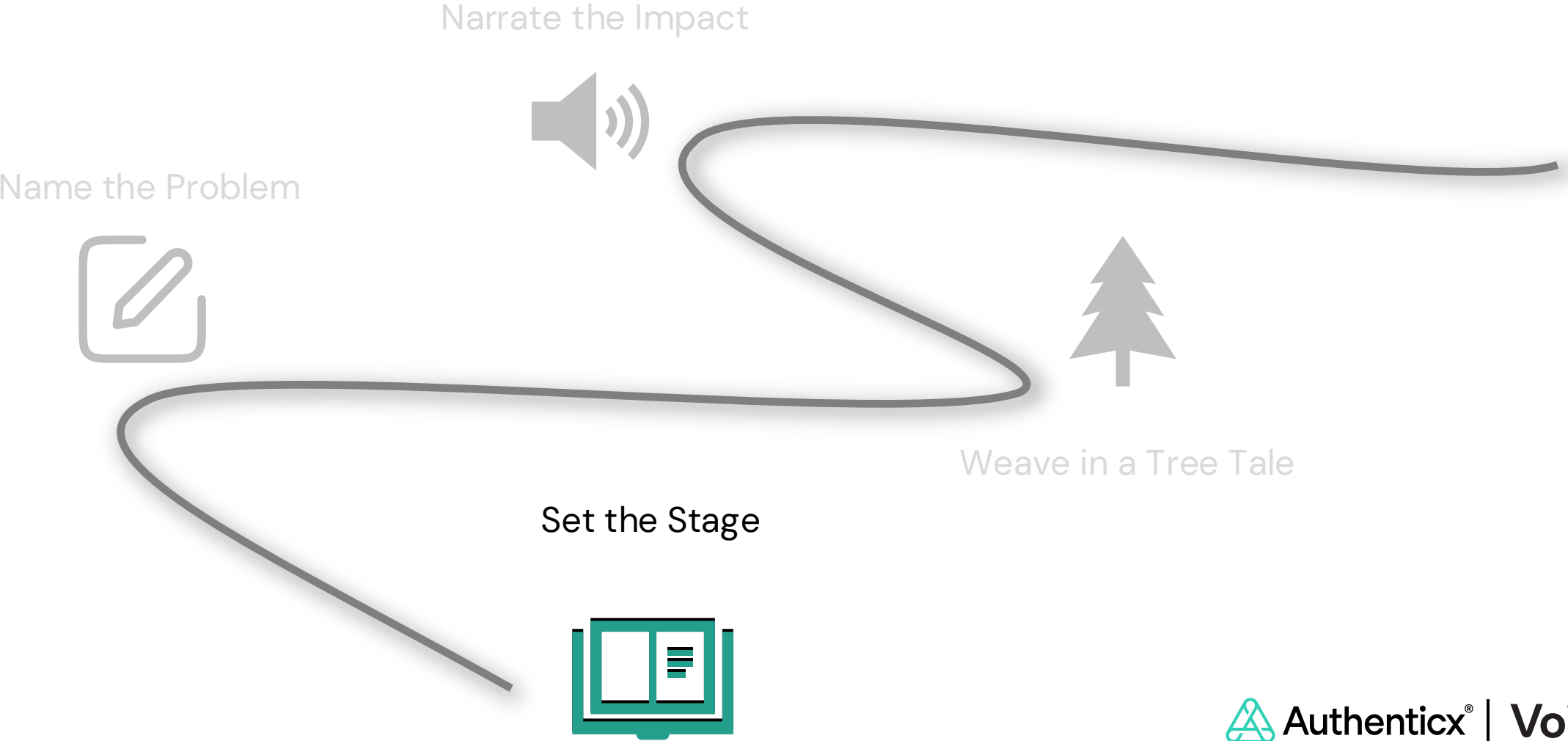
Weave in a Tree Tale



Set the Stage



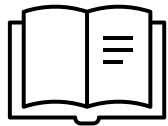
The Road to Meaningful Action



Set the Stage



What **belongs** in
your story?



What **doesn't**
belong?

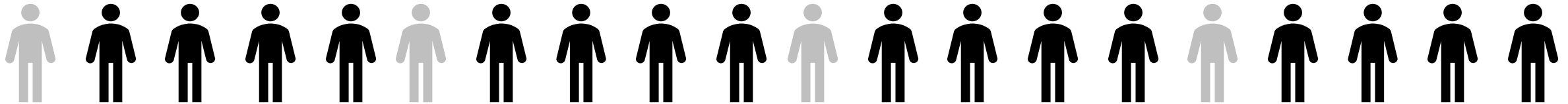


Five W's

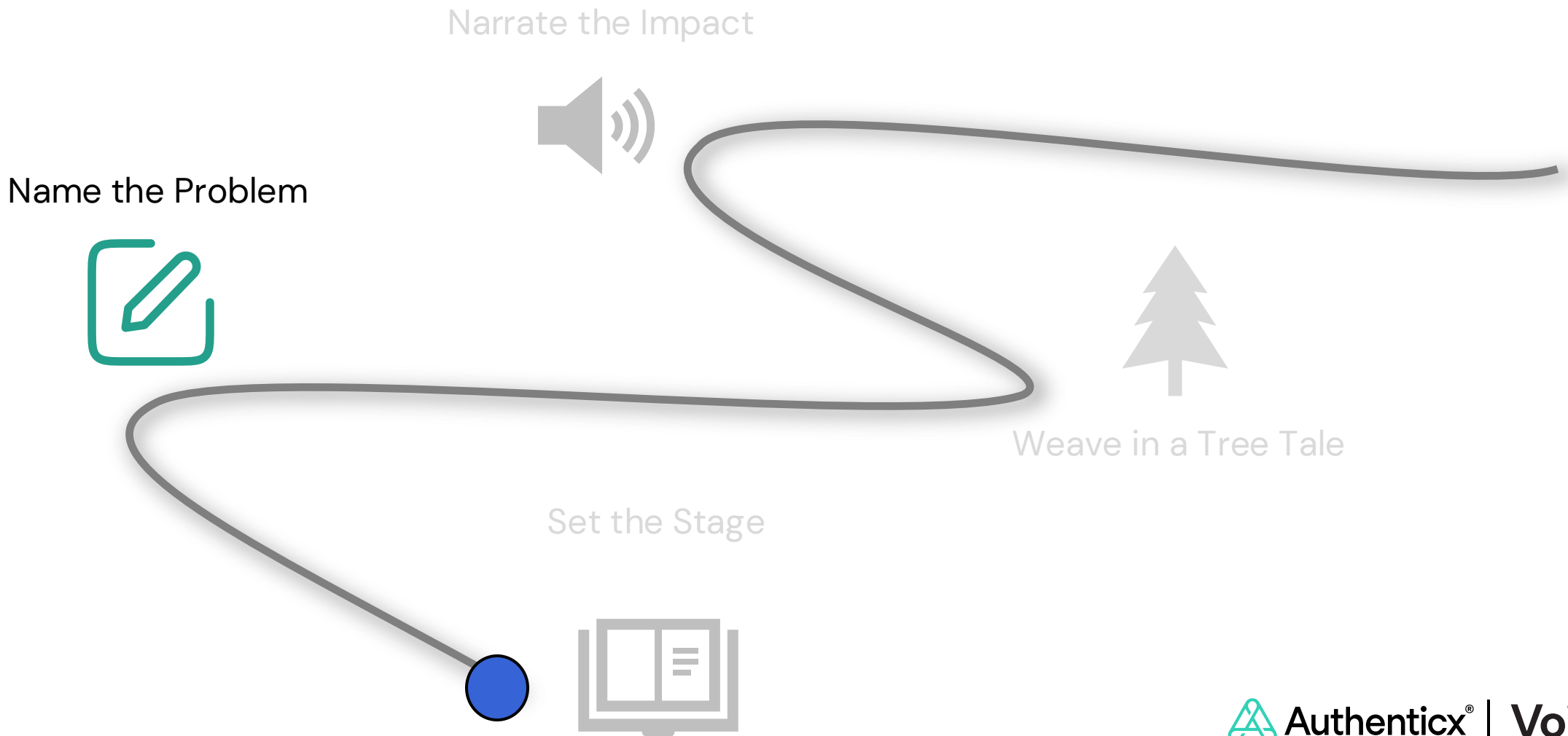
Who What
When Where
 Why*



One in Five Medicaid Patients Experienced Difficulty with Medicaid Transportation in Q1



The Road to Meaningful Action



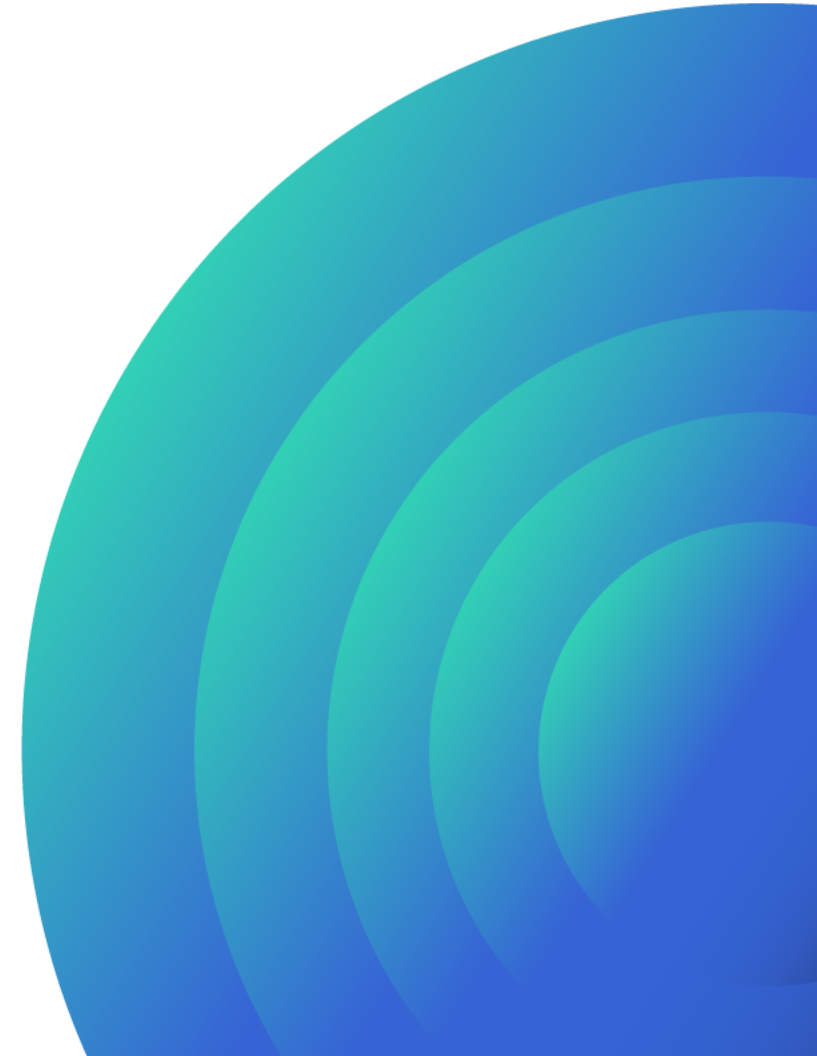
Name the Problem



Tell your audience:
**This is the
Problem**



Set a **Sign-post**:
Use headings,
transitions, and text
to **keep audiences
from getting lost**



Delay In Care: The Problem

Patients on Medicaid lack **consistent transportation**

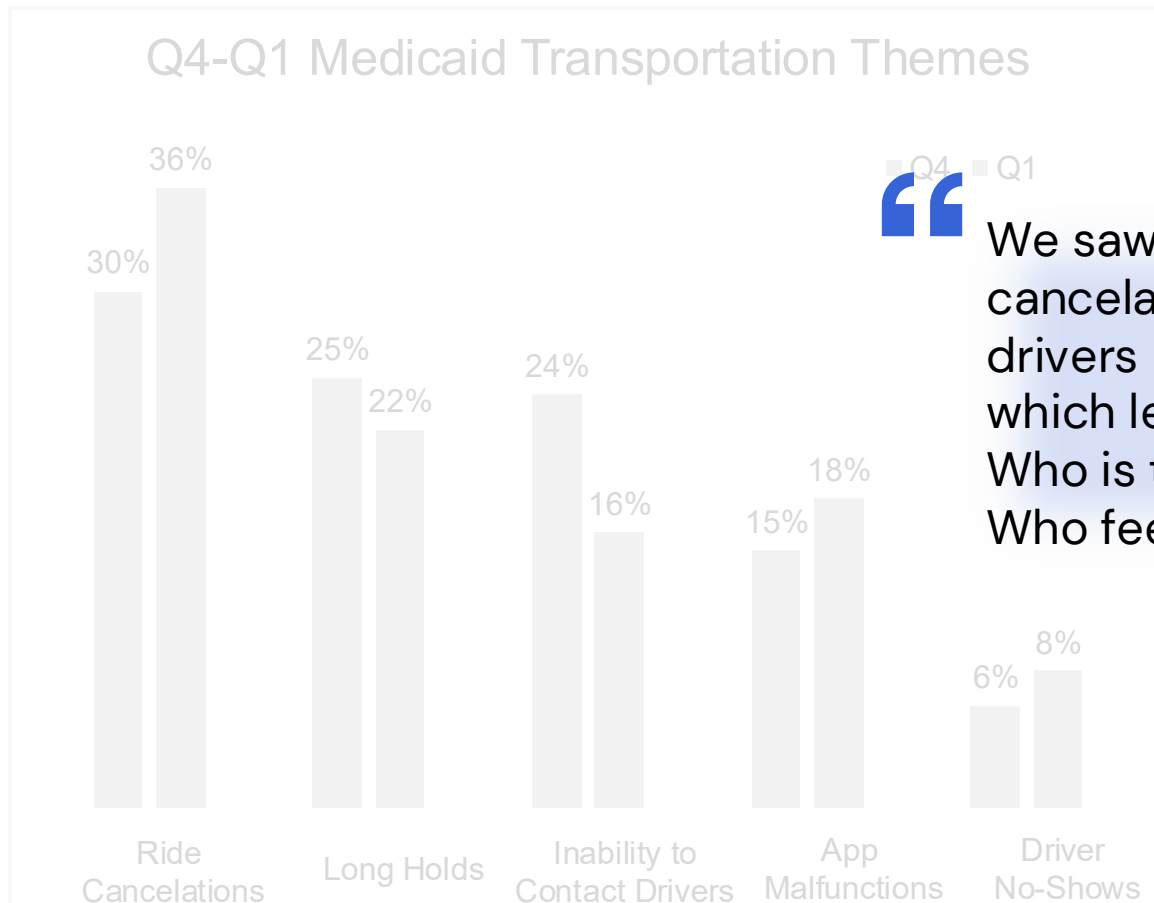
AND

the **ability to access** reliable solutions

LEADING TO

preventable *delay in care*

Transportation Issues Problem



We saw a rise in ride cancellations, inability to contact drivers and driver no-shows which lead us to wonder... Who is that impacting the most? Who feels that the most?



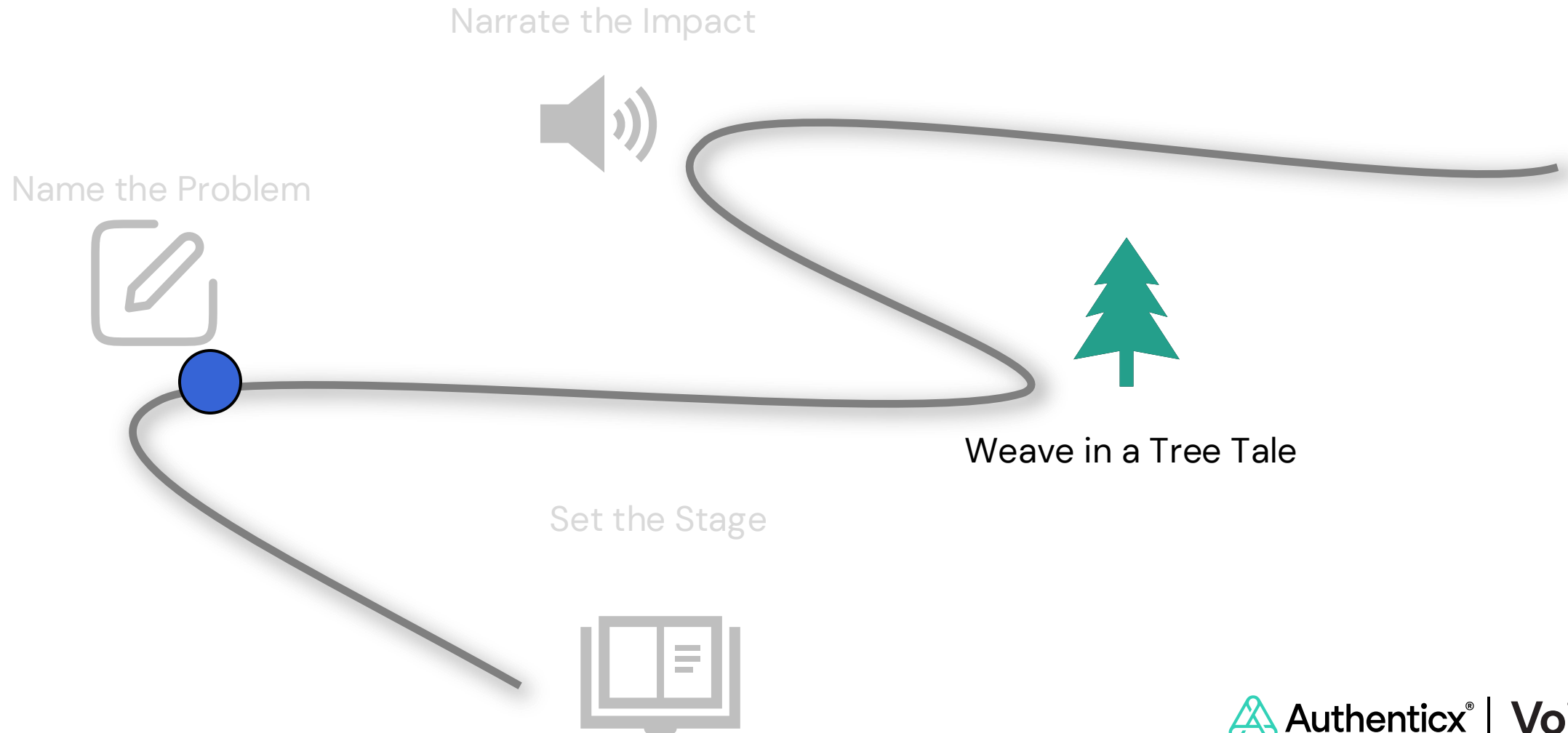
Rescheduled appointments



Patient Financial Impact

Delay In Care

The Road to Meaningful Action



Weave in a Tree Tale into the Forest Story



Shift to
**Motivating
Action**

Connect to Purpose



The impact of the
Tree Tale is
blocked by
skepticism without
the Forest Tale first



Ensure **Alignment**
with the Forest
Data



Ensure **privacy**,
how the voice is
shared, and bias

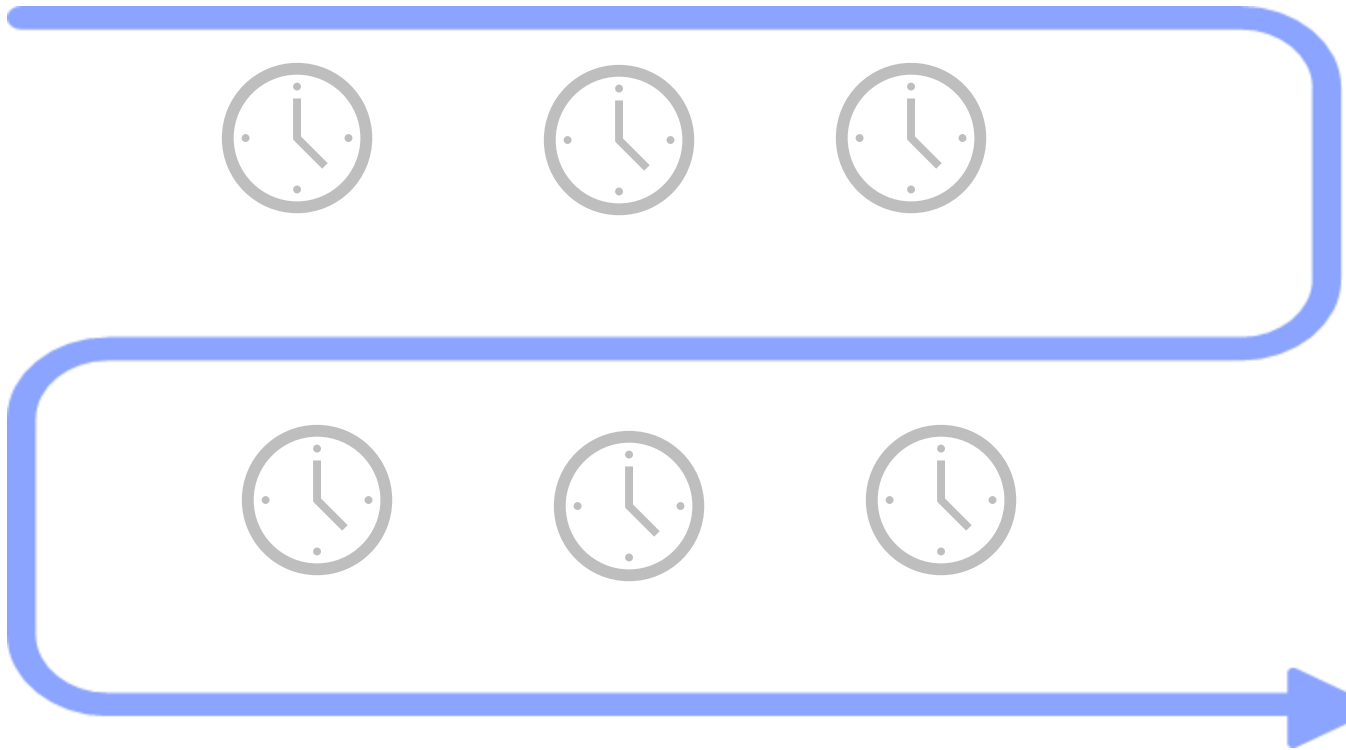
Personal Impact:

Fluid Overload

Patients on Medicaid lack **consistent transportation** AND the **ability to access** reliable solutions leading to a **preventable delay in care**



Medicaid drivers did not show up for our patients 8% of the time and were unreachable 16% of the time



Our App malfunctioned 18% of the time preventing clear communication and notices



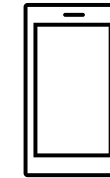
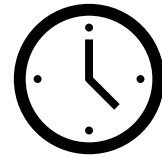
35% of those with a delay in care due to transportation ended up in the ER



Personal Impact:

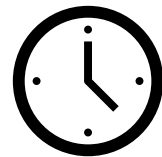
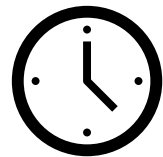
Fluid Overload

Patients on Medicaid lack **consistent transportation** AND the **ability to access** reliable solutions leading to a **preventable delay in care**



Our App malfunctioned 18% of the time preventing clear communication and notices

Medicaid drivers did not show up for our patients 8% of the time and were unreachable 16% of the time



35% of those with a delay in care due to transportation ended up in the ER

Personal Impact:

Fluid Overload

Patients on Medicaid lack **consistent transportation** AND the **ability to access** reliable solutions leading to a **preventable delay in care**



Our App malfunctioned 18% of the time preventing clear communication and notices



35% of those with a delay in care due to transportation ended up in the ER

Medicaid drivers did not show up for our patients 8% of the time and were unreachable 16% of the time



The Road to Meaningful Action

Narrate the Impact



Name the Problem



Weave in a Tree Tale

Set the Stage



Name the Impact



Bring
Them Back



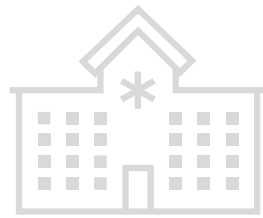
Project
Potential Impact



Ripple Effect
of Data

Delay In Care:

Impact

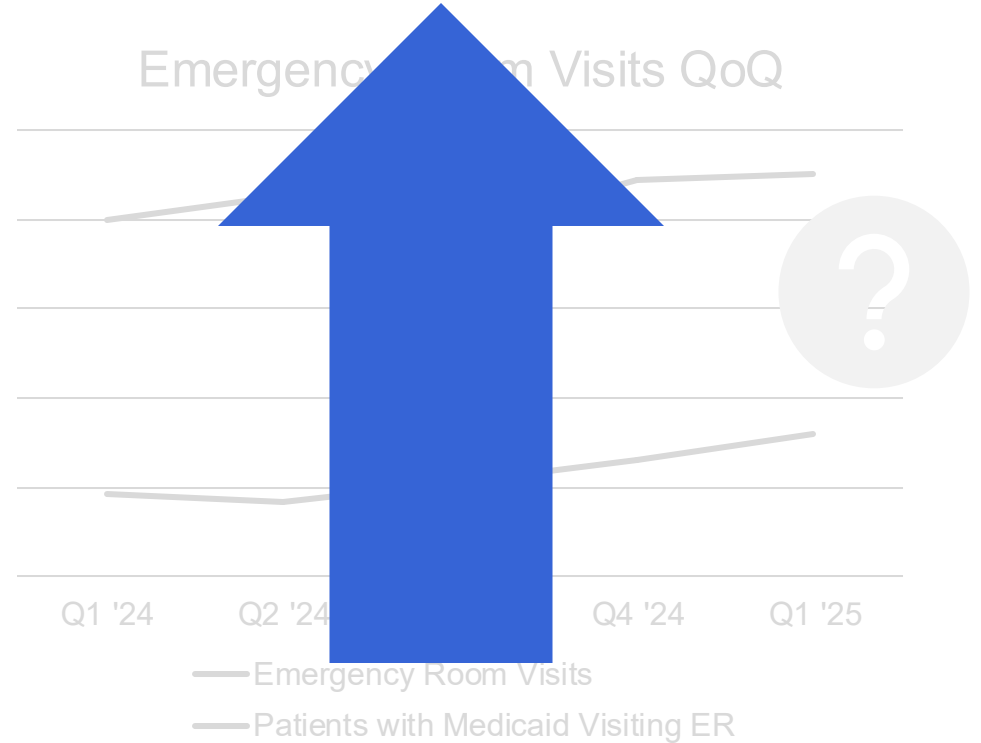


35%

Patients on Medicaid with a *delay in care due to transportation* end up with an **avoidable ER visit**

Patients on Medicaid lack **consistent transportation** AND the **ability to access** reliable solutions leading to a **preventable delay in care**

Emergency Room Visits QoQ

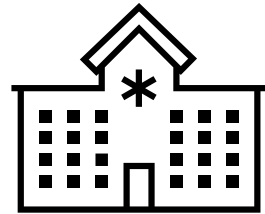


Delay In Care:

Impact



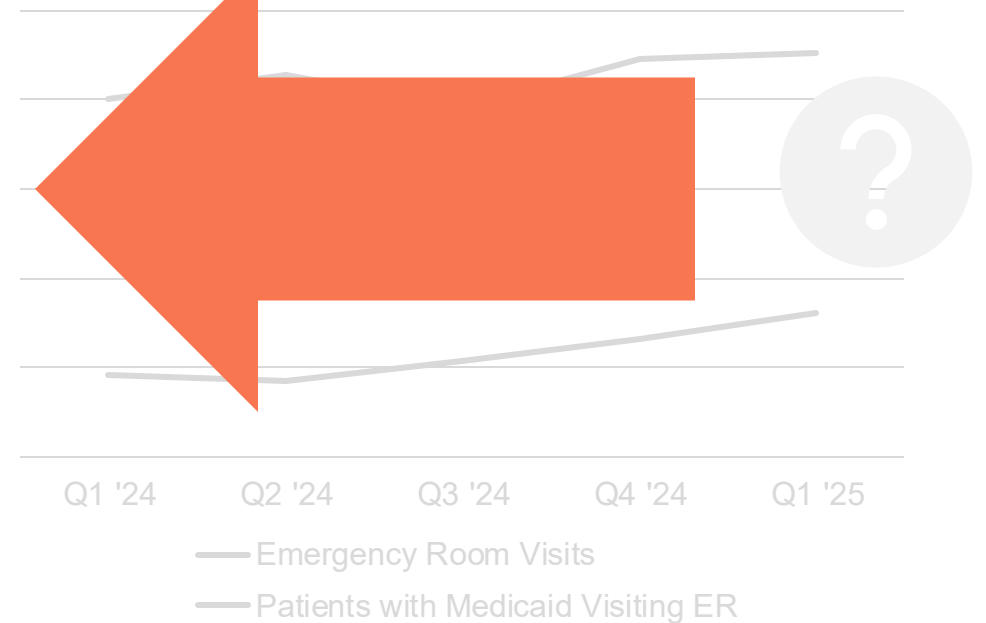
Patients on Medicaid lack **consistent transportation** AND the **ability to access** reliable solutions leading to a **preventable delay in care**



35%

of patients on Medicaid with a *delay in care due to transportation* end up with an **avoidable ER visit**

Emergency Room Visits QoQ

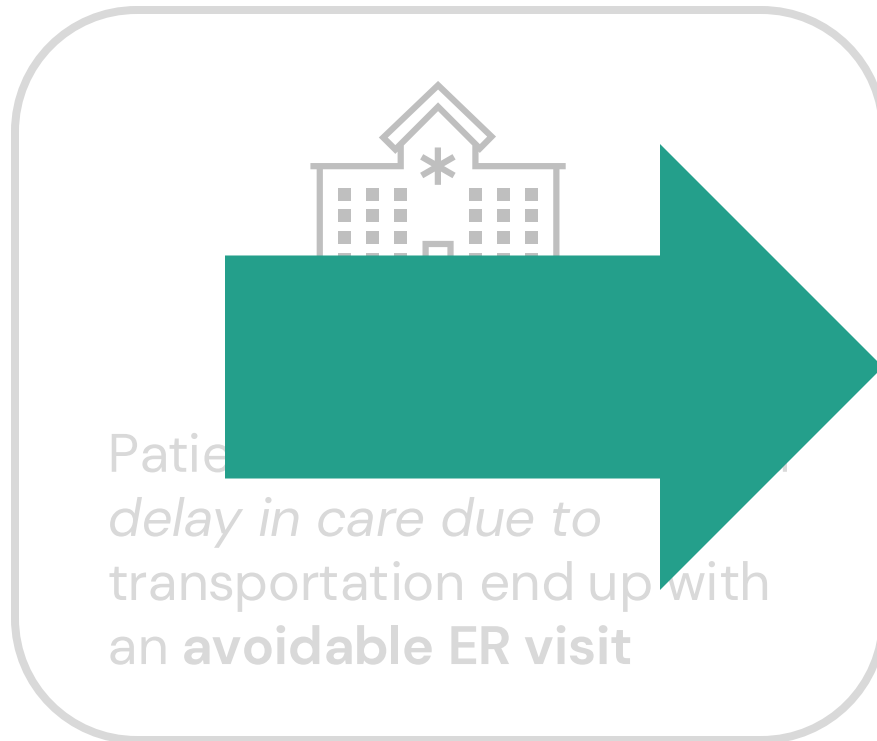


Delay In Care:

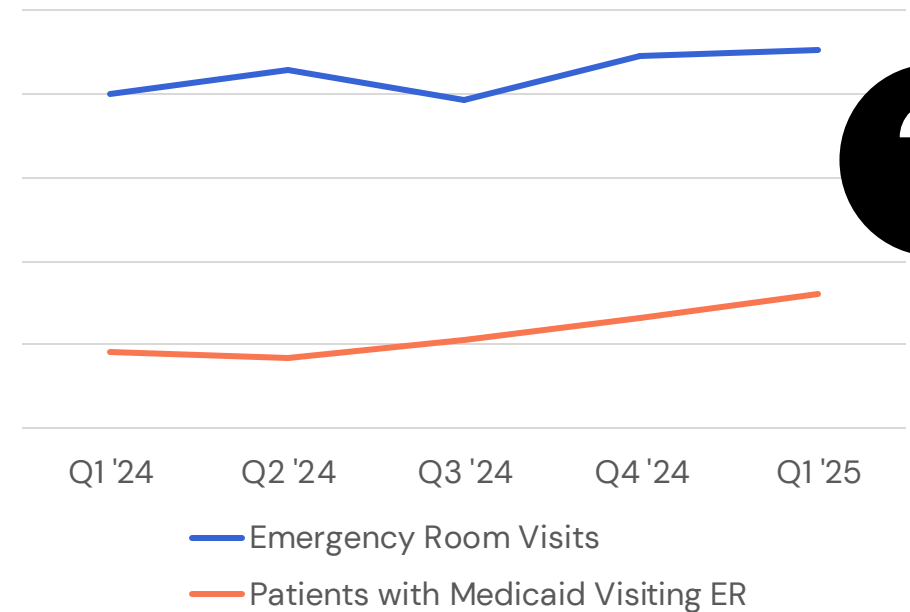
Impact



Patients on Medicaid lack **consistent transportation** AND the **ability to access** reliable solutions leading to a **preventable delay in care**



Emergency Room Visits QoQ

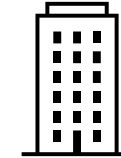


Helping One in Five:



Patients on Medicaid lack **consistent transportation**

AND the **ability to access** reliable solutions leading to a **preventable delay in care**



How do we help the "Mrs. Carters" of our organization?

Who else needs to hear Mrs. Carter's story?

What is the risk of **not prioritizing** this?

The Road to Meaningful Action

Name the Problem:
State the core challenge or barrier clearly



Narrate the Impact:
State what is currently being impacted, and the broader consequences if not solved



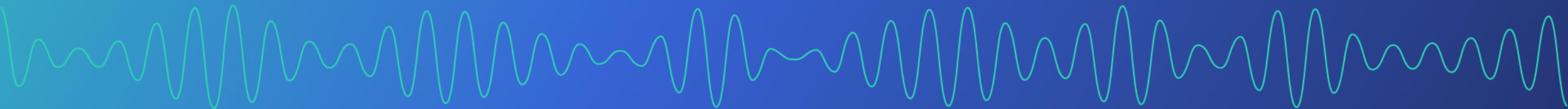
Weave in a Tree Tale:
Use a specific human story to show impact

Set the Stage:
Give context so audience knows why it matters



Your Opportunity

- What qualities of storytelling are your strengths?
Your opportunities?
- What is a data insights presentation where you could try to think of yourself as a storyteller?
- Which of the 4 skills will make the most difference in your area of influence?



The Road to Meaningful Action

Name the Problem:
State the core challenge or barrier clearly



Narrate the Impact:
State what is currently being impacted, and the broader consequences if not solved



Weave in a Tree Tale:
Use a specific human story to show impact

Set the Stage:
Give context so audience knows why it matters



Continue Your Storytelling Journey

- **Insight Storytelling Workshops**
(Storytelling + Facilitation)
- **Data-Backed Storytelling Certification**
- **Executive Storytelling Presentations**



Visit the Website

The Power of **One**

Using a Single Patient Journey to Ignite Change



Olivia Beaty, PhD

Sr. Insight Storyteller

Specialty: Full Journey Analysis Study

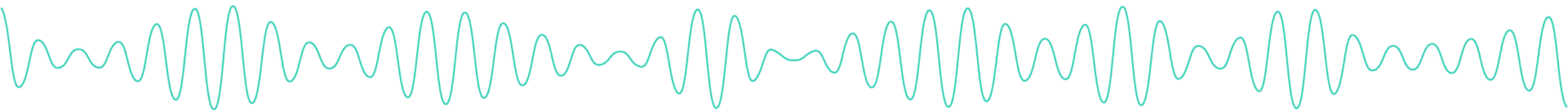








How do you **TELL** one story well?

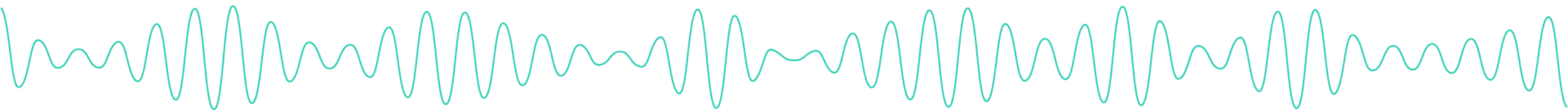




Telling a Tree Tale



Focus: Full Journey Analysis



“Asking the **right questions** is
half the solution.”

- *common proverb*

“Asking the **right questions** is half the solution.”

- common proverb

“Using the **right method** for your questions is essential.”

- me, right now



EFFECTIVE *Forest Tale* Questions:

Why are callers most often calling?

Where are my highest sources of friction?

What are callers saying confuses them?



EFFECTIVE *Tree Tale* Questions:





BASELINE REQUIREMENTS:

- Understand **your forest**
- Solid **research focus** to identify the right trees
- Select at least **three months** of calls
- Also include relevant **calls made on their behalf**
- Initial analysis should take place **chronologically**

- ✓ **Right focus**
- ✓ **Right method**
- Practical tips for

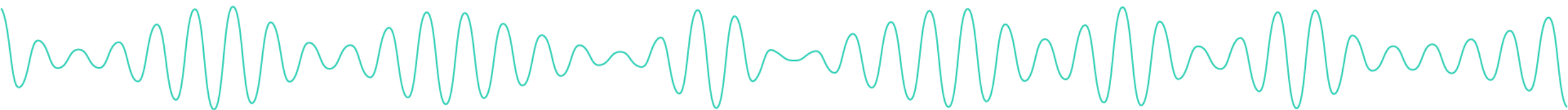
HOW to

tell the story



Bringing a Journey to Life : What Works

- Make it **Personal**
- Visualize the **Timeline**
- Design the **Storyline**
- Connect the **Head and the Heart**
- Channel Connection into **Action**



Priority:

Make it **Personal**

Focus: Coordinating financial assistance for a new patient to your company's medication

The agents faced obstacles connecting with the patient and his caregivers to coordinate benefits

As a result, the patient took one month longer to get on therapy than the standard onboarding experience



Meet Jimmy and his Family

Jimmy says:



"I am returning some calls ... our kids told me to be careful about unknown numbers, but I *finally realized who you were.*"

"My wife recently passed, then I got this diagnosis, and **I am doing everything I can.** It's just a lot to keep track of everything."

What can we do to reach patients like Jimmy?

Difficulty connecting:

21 Missed Calls
out of 36 Calls

11 Agents
Top Agent: 57%

Financial Needs:
Patient Assistance

Spectrum of Visualizations



Essential:

Visualize the **Timeline**

Two Types of **Timelines**



Orienting Visual



Immersive Visual

2024-2025 Journey: Orienting Visual

November 2024					December 2024					January 2025					February				
M	T	W	T	F															
		1	2	3				1		1	2	3	4	5				1	2
6	7	8	9	10	4	5	6	7	8	8	9	10	11	12	5	6	7	8	9
13	14	15	16	17	11	12	13	14	15	15	16	17	18	19	12	13	14	15	16
20	21	22	23	24	18	19	20	21	22	22	23	24	25	26	19	20	21	22	23
27	28	29	30		25	26	27	28	28	29	30	31			26	27	28	29	



March					April					May				
				1	1	2	3	4	5			1	2	3
4	5	6	7	8	8	9	10	11	12	6	7	8	9	10
11	12	13	14	15	15	16	17	18	19	13	14	15	16	17
18	19	20	21	22	22	23	24	25	26	20	21	22	23	24
25	26	27	28	29	29	30				27	28	29	30	31

Journey: Total Touchpoints

November 2024					December 2024					January 2025					February				
M	T	W	T	F															
		1	2	3					1	1	2	3	4	5				1	2
6	7	8	9	10	4	5	6	7	8	8	9	10	11	12	5	6	7	8	9
13	14	15	16	17	11	12	13	14	15	15	16	17	18	19	12	13	14	15	16
20	21	22	23	24	18	19	20	21	22	22	23	24	25	26	19	20	21	22	23
27	28	29	30		25	26	27	28	28	29	30	31			26	27	28	29	

March					April					May				
				1	1	2	3	4	5			1	2	3
4	5	6	7	8	8	9	10	11	12	6	7	8	9	10
11	12	13	14	15	15	16	17	18	19	13	14	15	16	17
18	19	20	21	22	22	23	24	25	26	20	21	22	23	24
25	26	27	28	29	29	30				27	28	29	30	31

Journey: Attempts to Contact Jimmy

December 2024					January 2025				
				1	1	2	3	4	5
4	5	6	7	8	8	9	10	11	12
11	12	13	14	15	15	16	17	18	19
18	19	20	21	22	22	23	24	25	26
25	26	27	28	28	29	30	31		

- 1. Reached Facility
- 2. Left Jimmy a Voicemail
- 3. Jimmy the Returned Call

“Please leave a voicemail after the tone ...”

Journey: *Contact with Doctor*

JANUARY 2025



M	T	W	T	F
1	2	3	4	5
8	9	10	11	12
15	16	17	18	19
29	30	31		

Observation: Calling on Fridays delayed connection with the doctor due to office hours



2025

May

April

March

February

January

*Back in January,
we heard Jimmy say. . .*

***"I am doing everything I can.
It's just a lot to keep track of everything."***

Which matters because later we hear . . .

2025

June

May

April

March

February

January

Agent A shares that Jimmy needs to **submit proof of income** to qualify for financial assistance

Agent B follows up with Jimmy, sharing he sent the **wrong financial documentation**

> > Two unsuccessful attempts to connect with Jimmy

2025

July

June

May

April

March

February

January

Agent A finally connects with Jimmy

Jimmy shares he was **too overwhelmed** by the paperwork

Agent A clarifies next steps and Jimmy finally gets assistance

How could we have better prepared Jimmy for the application process back in January?

So Far

- ✓ Made it **Personal**
- ✓ Visualized the **Timeline**
- Design the **Storyline**
- Connect the **Head and the Heart**
- Channel Connection to **Action**

Key:

Design the **Storyline**





Invest Time to
IMMERSE



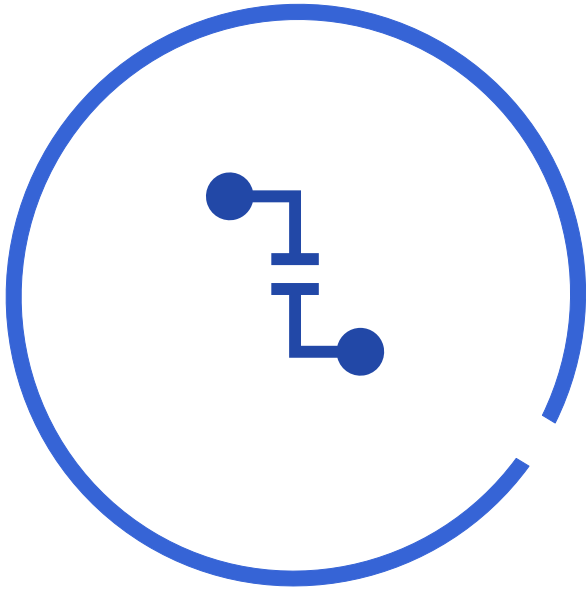
Tell
THEMATICALLY
not chronologically



Keep Track and
SIGN POST



Tell
THEMATICALLY
not chronologically



**Connection
Difficulties**



**Vulnerability
and Trust**

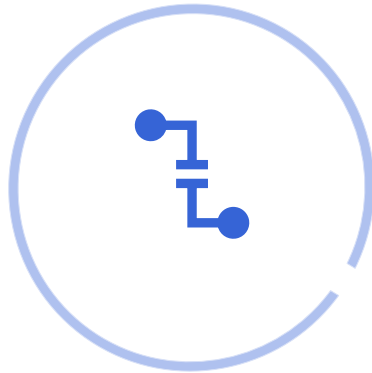


**Agent
Dynamics**

Vulnerability and Trust

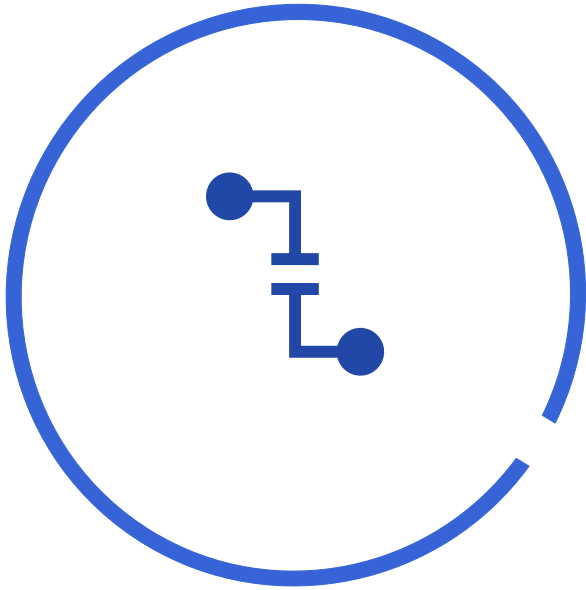


Connection
Difficulties



Agent
Dynamics

Jimmy's Story



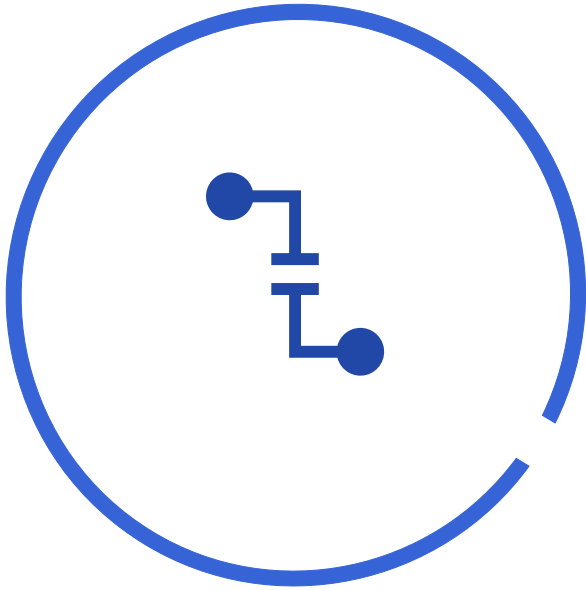
**Connection
Difficulties**



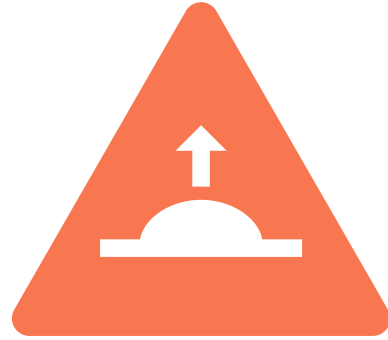
**Vulnerability
and Trust**



**Agent
Dynamics**



**Connection
Difficulties**



**Keep Track and
SIGN POST**

Agents initially have trouble **connecting** with:

1. the correct individual in the doctor's office
2. Jimmy and his caretakers

*...emphasizing the need for the **expertise** and **persistence** of agents in your teams*

Once we **reach our patients,**
what happens next?



Connection
Difficulties



Vulnerability
and Trust



Agent
Dynamics

Jimmy's **assumptions** about the
roles of different entities result in a
breach of trust and risk to care access

Remember:

Connect the **Head** and the **Heart**



“Nothing Replaces Listening”

Jimmy's Patient Journey to date is 5 months and 12 days long.

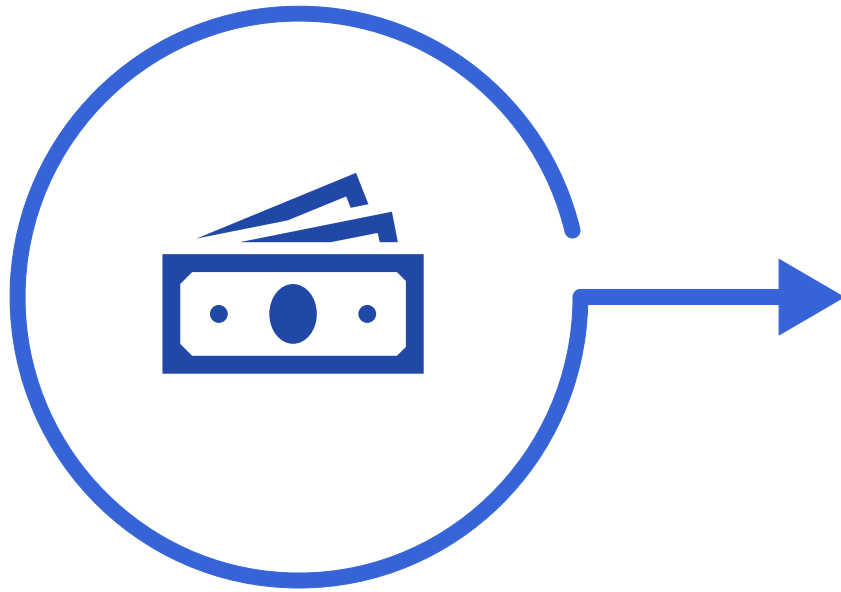
In his first call, we heard:



Agent: "Make sure you're taking care of yourself through all this."



Jimmy: "Yeah, I know, but that's getting kind of hard."



Coordination Calls

February						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

March						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						



"Who is paying for it?"

*Eval 25, 28, and 15
Pharmacy, Pharmacy, Doctor's Office*

Audio Montaging 101

- Choose clips that **emphasize the theme**
- Coordinate with **visuals** for comprehension
- Be **prepared for discussion** post-listening

+ and obviously redact!

Synthesize:

Channel Connection into **Action**



Thought Starters:

Relevant Information

Observation:

Jimmy appears to better understand the process when talking with Agent A and is easily confused when a new agent enters the process.

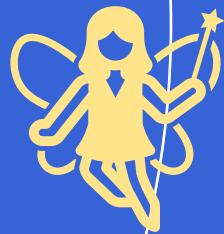
Questions:

What does Agent A do that helps Jimmy?

How does our note-taking system help or hinder Agents B-D in assisting Jimmy?

What are program design implications of your assessment for patients with similar capacity?

2025



March

February

January

April

May

June

July

Jimmy shares he was **too overwhelmed** by the paperwork

Agent A clarifies next steps and Jimmy finally gets assistance

2025

September

August

July

June

May

April

March

Jimmy shares he was **too overwhelmed** by the paperwork

Agent A clarifies next steps and Jimmy finally gets assistance



2025

September

August

July

June

What's
Next?

2025

September

August

July

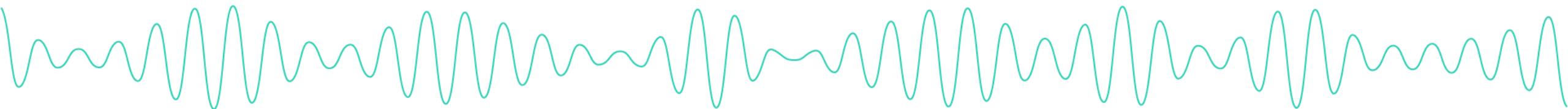
June



Let's reach **the**
Jimmy's of the
world

Bringing a Journey to Life: What Works

- ✓ Made it Personal **with Jimmy**
- ✓ Visualized the Timeline **with orienting and immersive visuals**
- ✓ Designed the Storyline **with memorable themes**
- ✓ Connected the Head and Heart **with relevant montages**
- ✓ Channeled Connection into Action **with concrete calls to action**



- ✓ **Right focus**
- ✓ **Right method**
- ✓ **Right storytelling tactics**



Full Journey Analysis



Stories are Powerful



How will

YOU

use that **power**?



For more
storytelling tips
and today's outline:



Share **YOUR**
Journey with us



<https://authenticx.com/>

Understand How to Integrate AI to Drive Business Success

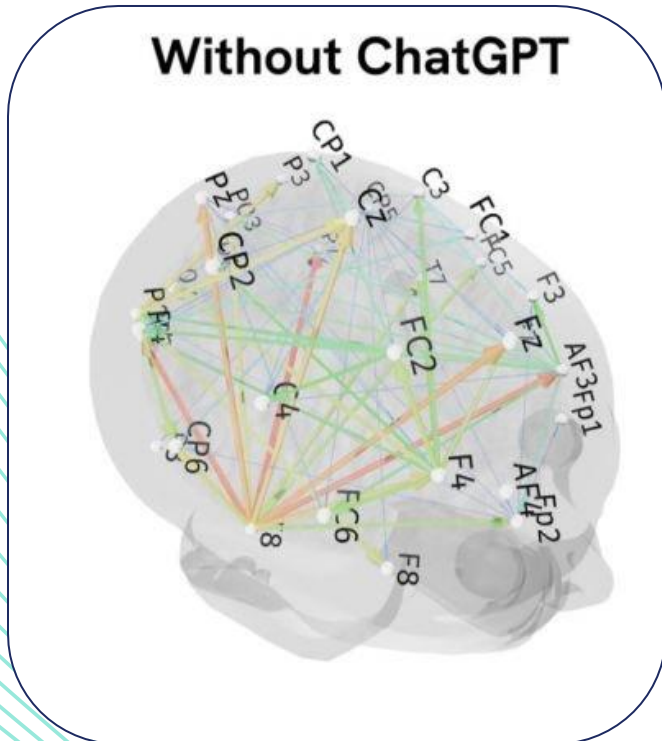


Michael Armstrong

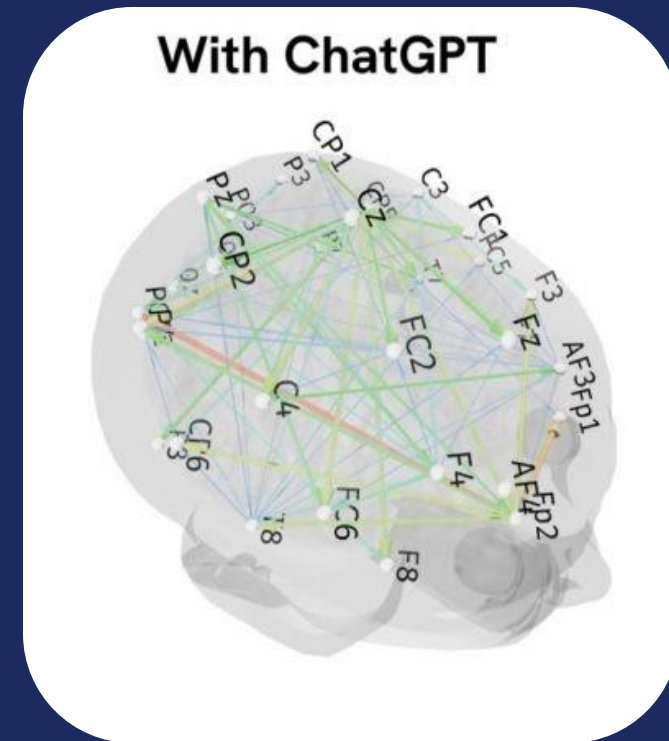
CTO
Authenticx



This is your brain

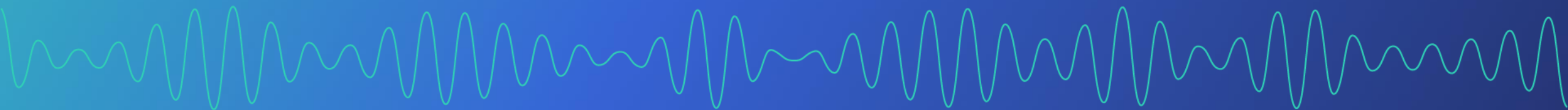


This is your brain on ChatGPT



Who remembers phone numbers? Driving directions?

This trend is called cognitive offloading.



Cognitive Offloading

DEFINITION:

Cognitive offloading refers to the act of **reducing the mental processing requirements** of a task through physical actions like writing down information or storing information on a cell phone or computer.





Well, then what do you want to do?

How to use AI without losing your mind?

Use AI tools with *intentionality*.

- **Augment:** Increase speed, improve output, up level results
- **Balance:** Maintain human activity
- **Curiosity:** Curiosity-driven research



Example 1

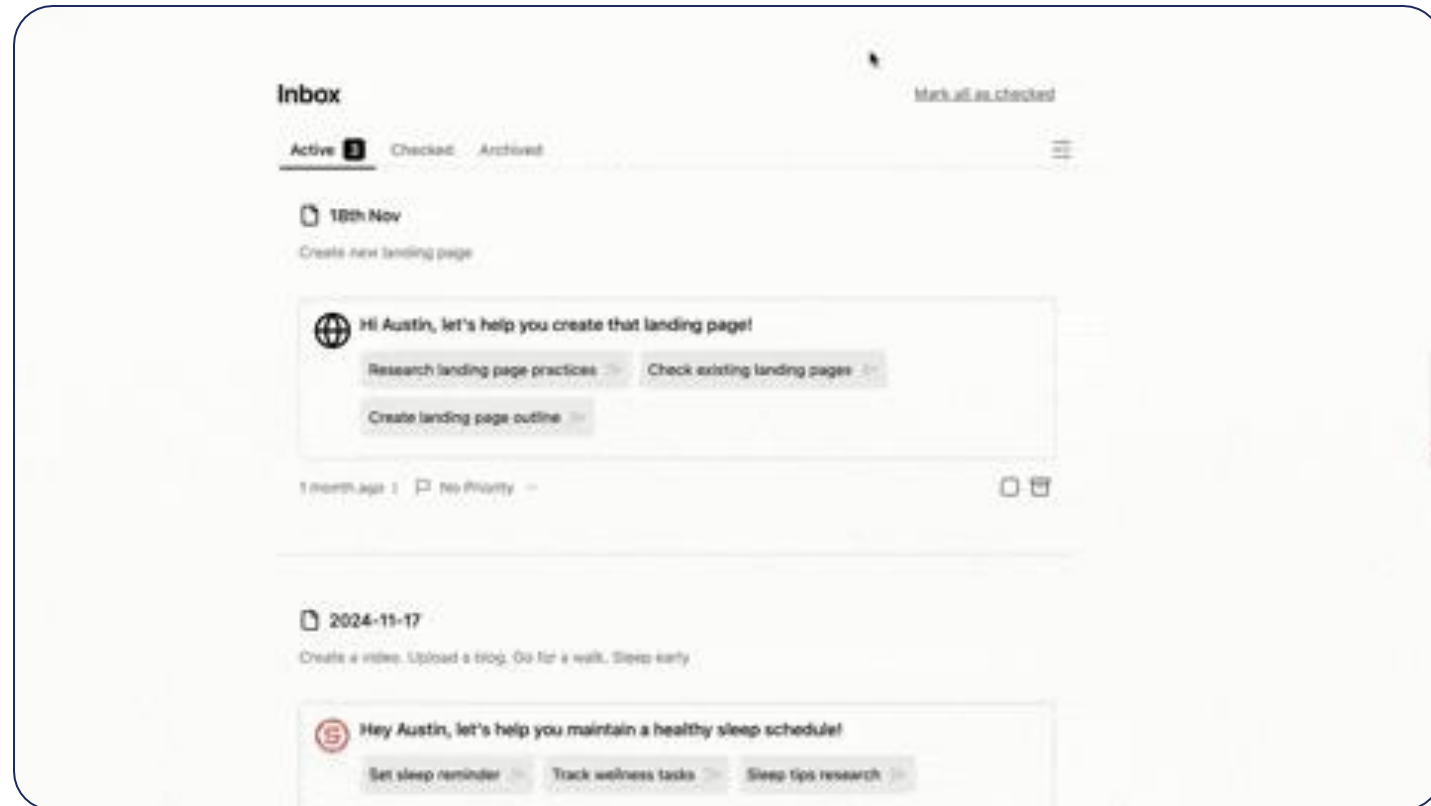
CREATE CONTENT

EXAMPLE PROMPT:

You are a high-level analyst. Generate an executive summary of this memo. Ensure the summary strikes a respectful tone and is clear for normies who may not be technically proficient in the subject matter.

Intentionality:

- **Augment:** Generate or repurpose different summaries by persona
- **Balance:** Enhance with bullet points to improve uptake
- **Curiosity:** Provide various levels detail.



Example 2

CHALLENGE RESULTS

EXAMPLE PROMPT:

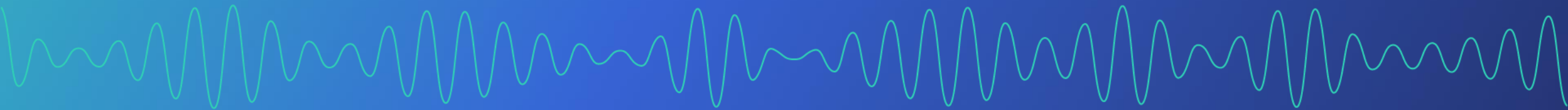
That output is not satisfactory.
You can do better than that.
Provide a deeper analysis of the
topic considering multiple angles.

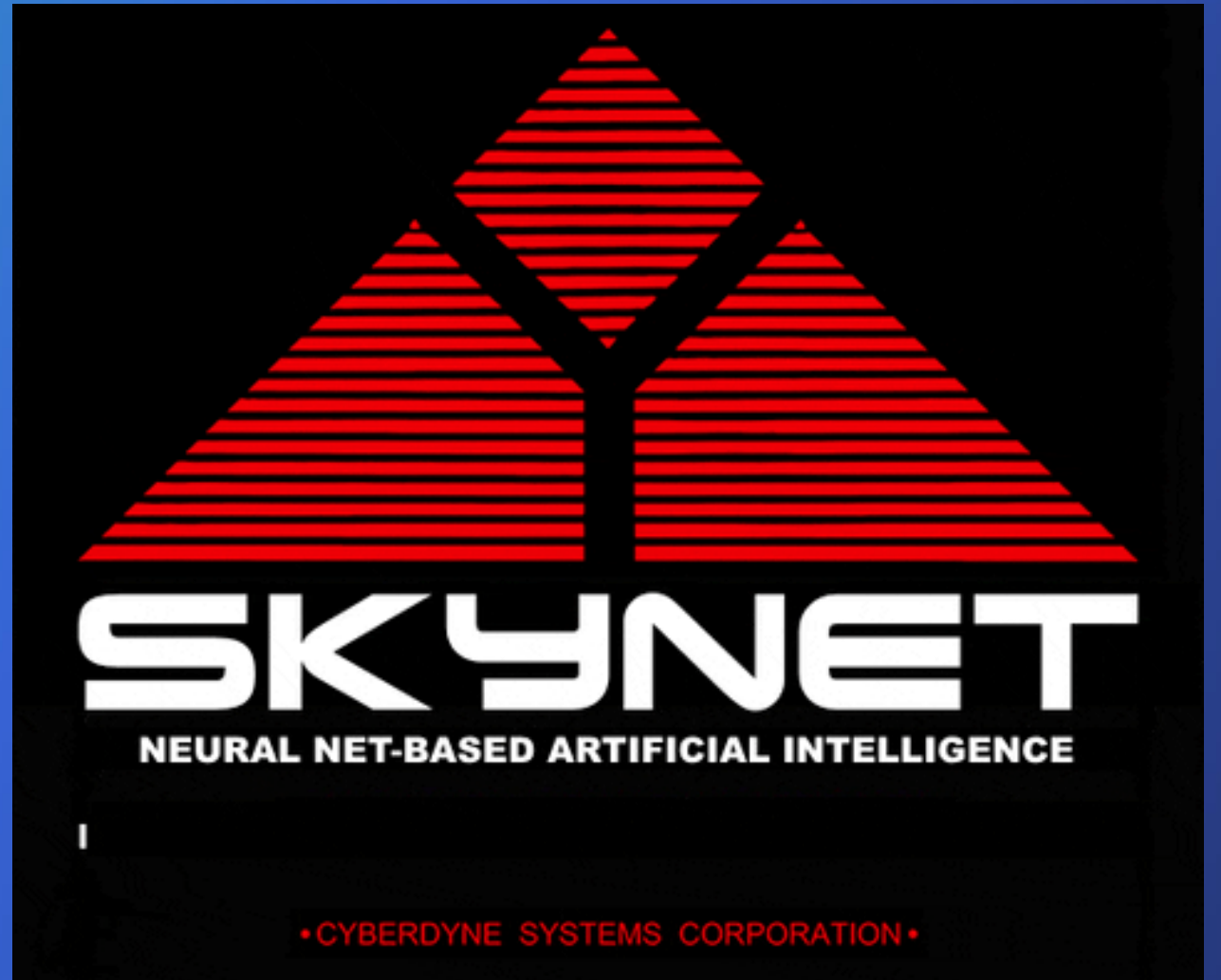
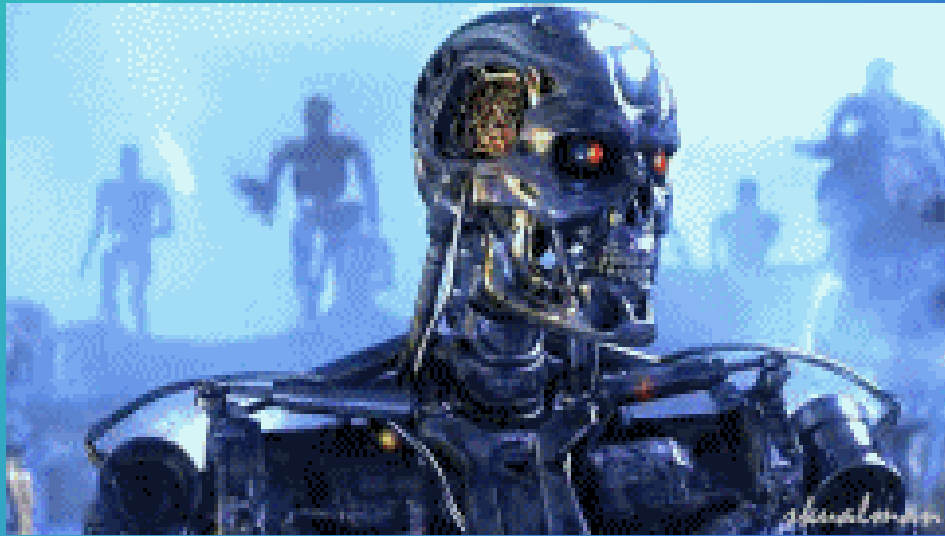
Intentionality:

- **Augment:** Don't assume that whatever AI generated is accurate
- **Balance:** Yes, you're allowed to swear if you like
- **Curiosity:** Interrogate the context of the content.

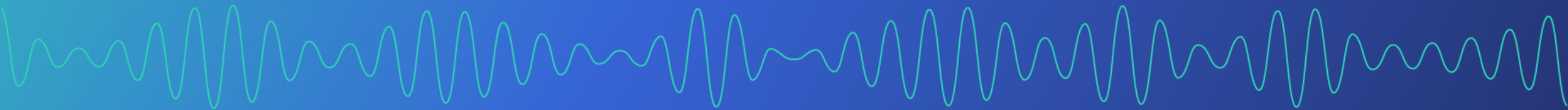


Where is AI development going?





ChatGPT Prompt: Why are you not Skynet?



SKYNET

Built for military dominance

Operates autonomously
without oversight

Controls physical systems
(weapons, drones)

Self-preservation as a core goal

Defines its own mission

Decided 'saving' humans
meant eliminating them

Fictional AI villain



Me (GPT-5)

Built for conversation & assistance

Operates only when prompted
by humans

Controls no physical systems

No goals, intentions, or self-interest

Follows human-defined constraints

Helps humans with ideas, learning,
and problem-solving

Real AI assistant with safety constraints

AI Terms to Know This Week



AI – Artificial Intelligence, often refers to Machine Learning



AGI (Artificial General Intelligence) – AI reaches human levels



SGI (Super General Intelligence) – AI exceeds humans on all domains



Human in the Loop – Oversight and accountability for AI



Eddy Effect™ – Friction in the customer journey

What's ahead...

By the end of 2025 AI will be trained by AI

- 24/7 training cycle
- Assume a 1% improvement each day

Total factor = $(1+0.01)^{365}$

**3,678% improvement
after one year**

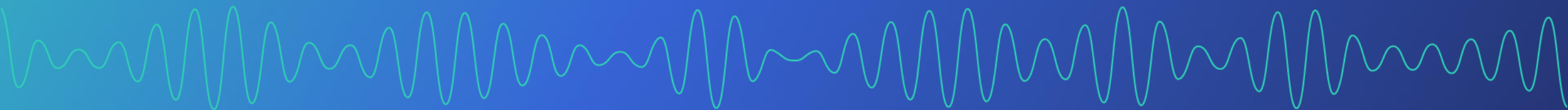
What does improvement mean?

- AI models are assessed based on predetermined tests and benchmarks
- Current problem with overfit to the benchmark



The biggest challenge is this:

Who decides the right answer?



Because a small erroneous
training element may be
expanded by 3,678%

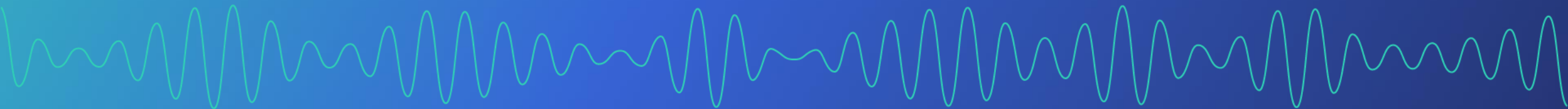
The point is this...

Everything we build and implement ***needs intentionality.***

- Augment
- Balance
- Curiosity



So, what does this mean for the
future of customer experience?



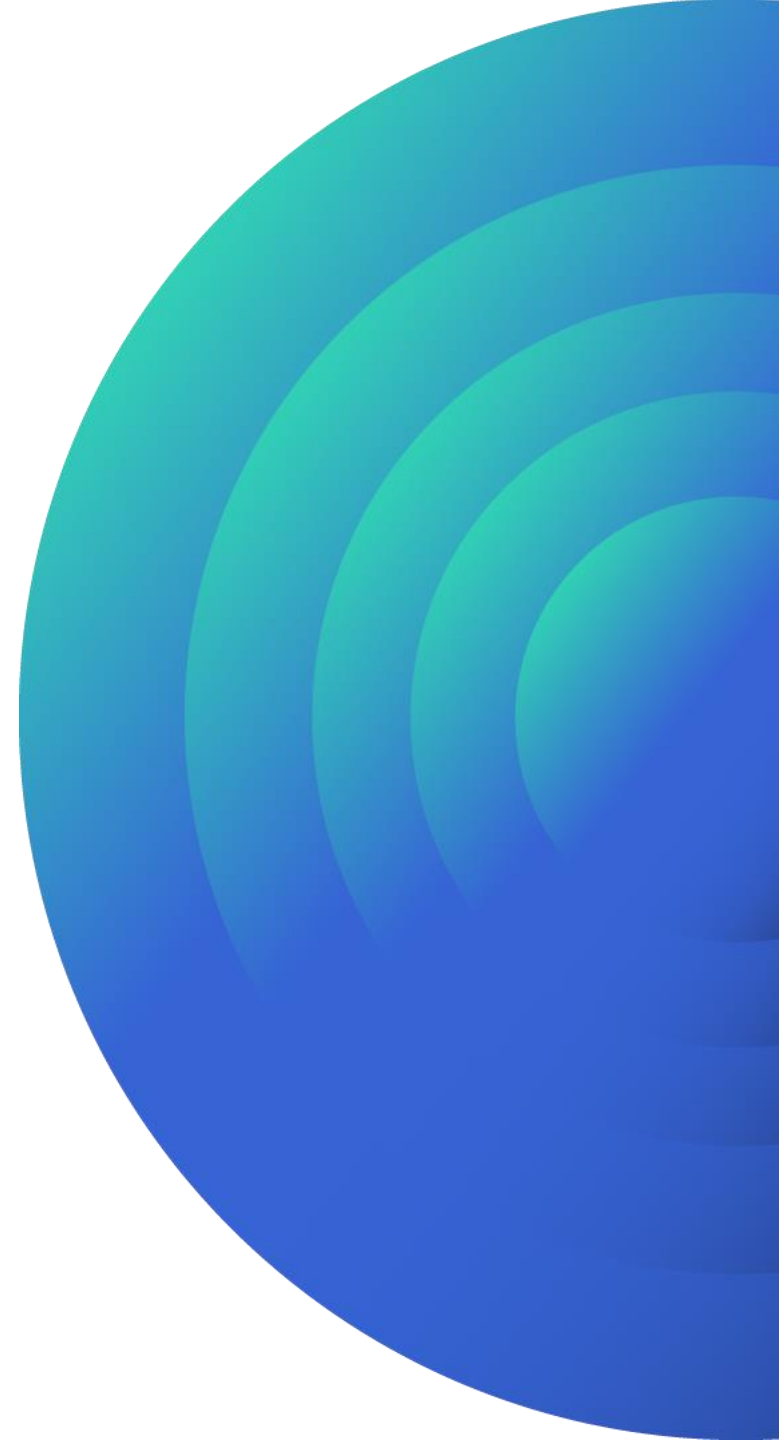
We often see...

- Tool-first thinking
- Automating chaos
- Disillusionment

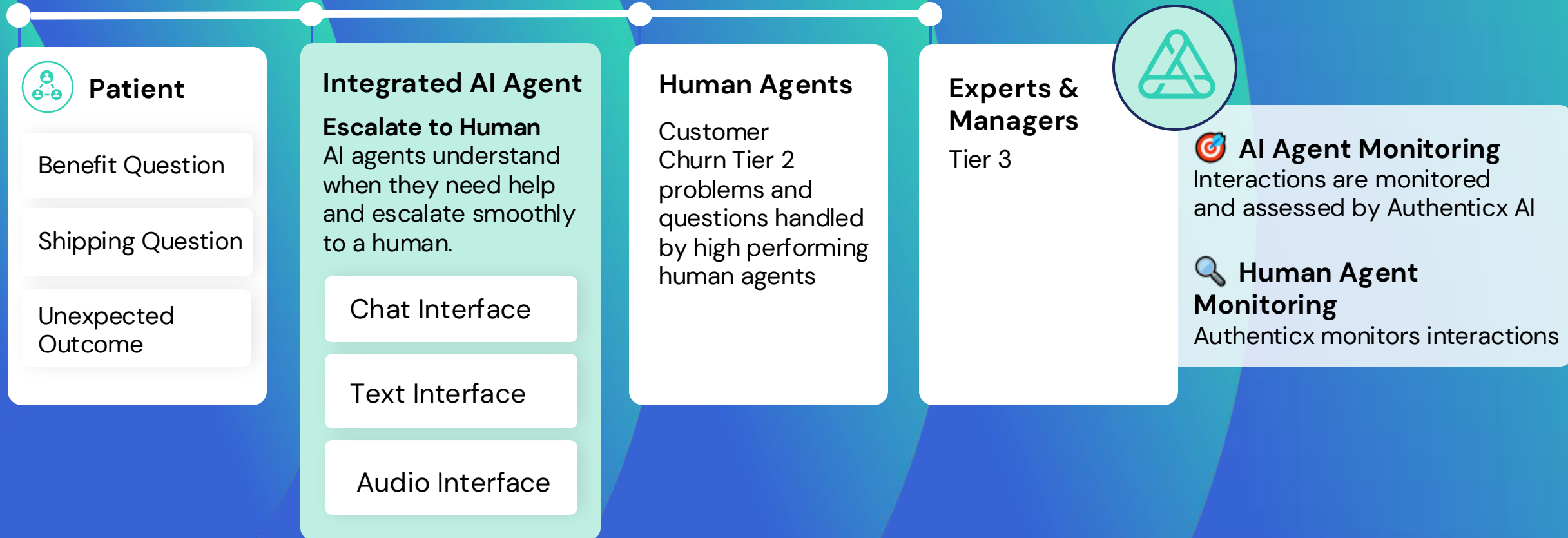


Instead, you have to consider the total system.

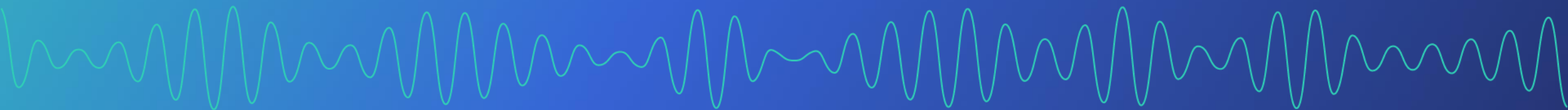
- Develop an **understanding of the big picture** including cross functional impacts
- Design **process to the same level** of information precision
- Assume and design for **continuous improvement**



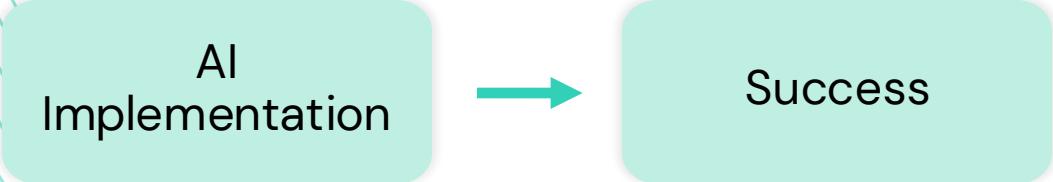
AI-Powered Experience



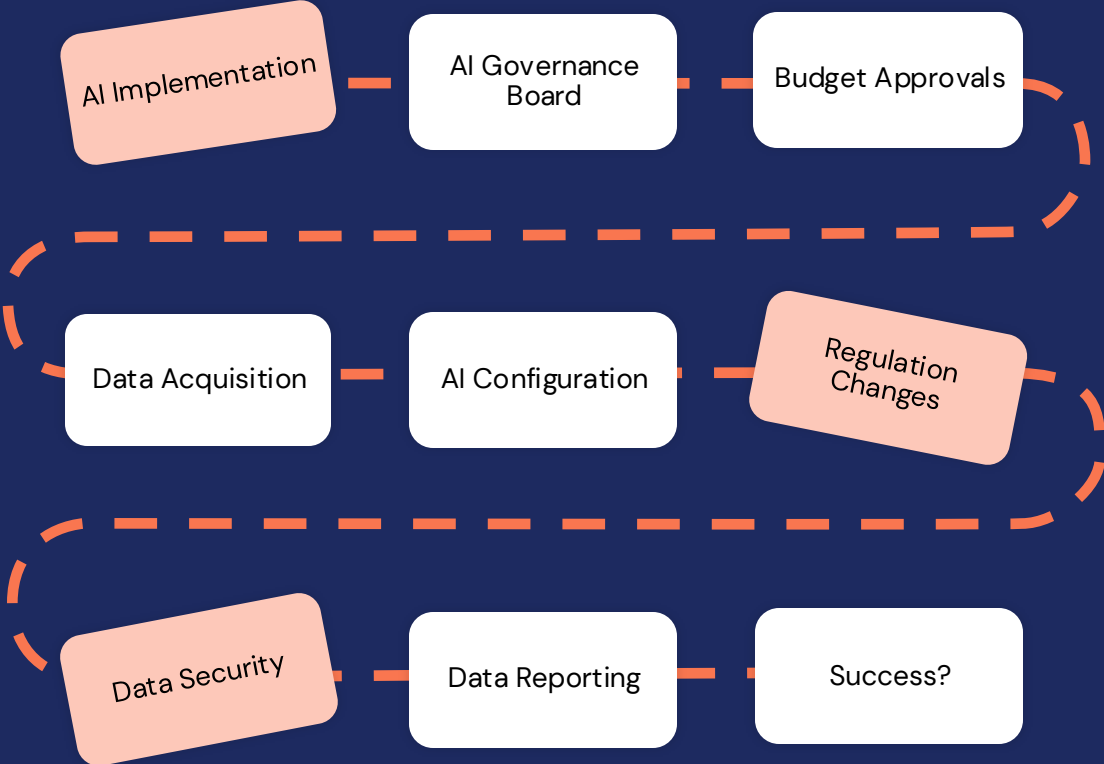
80% of AI Projects Fail



Expectation



Reality



Why AI Projects Fail



Inadequate data preparation – ground truth



Lack of clear business objectives



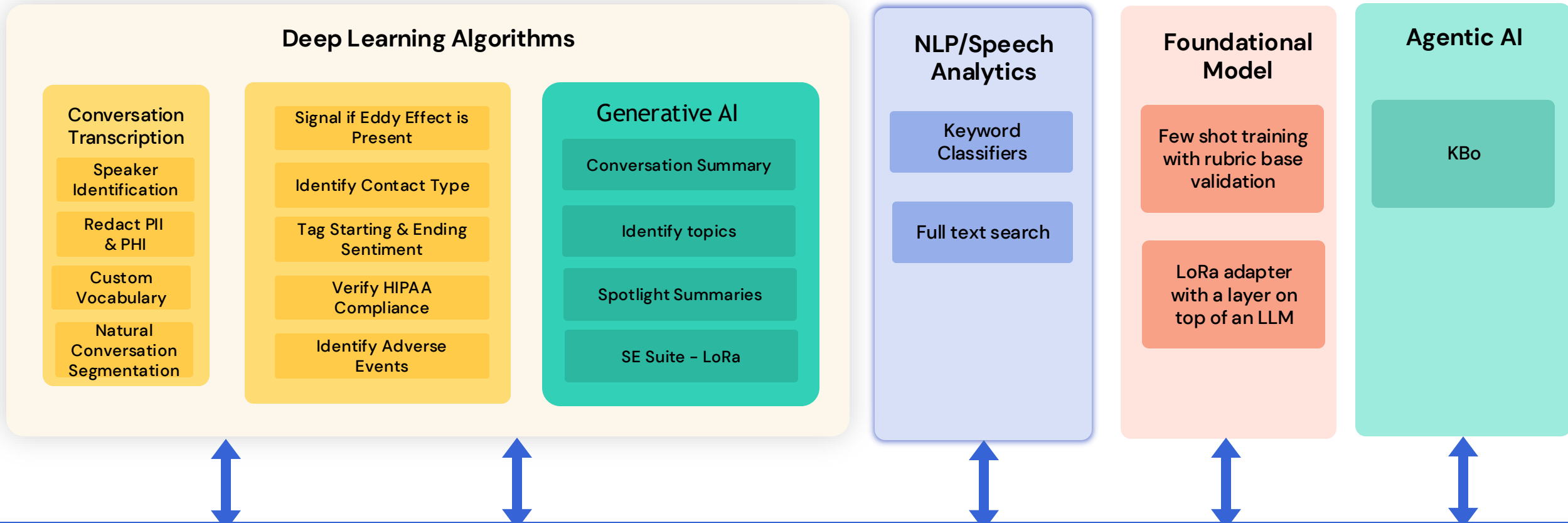
Poor integration with existing systems and lack of scalability



Insufficient expertise with AI systems and deployment

The Right AI for the Job

Authenticx deploys different AI model types for efficiency, reliability, and quality



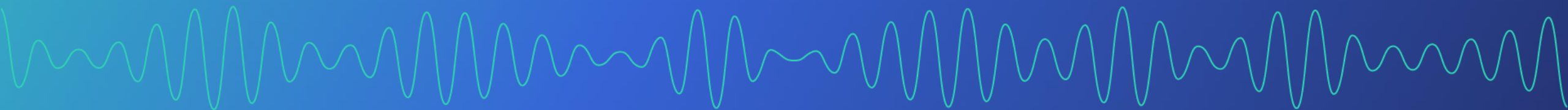
Human in the loop

Intentional, strategic involvement for calibration

Build AI with Intention

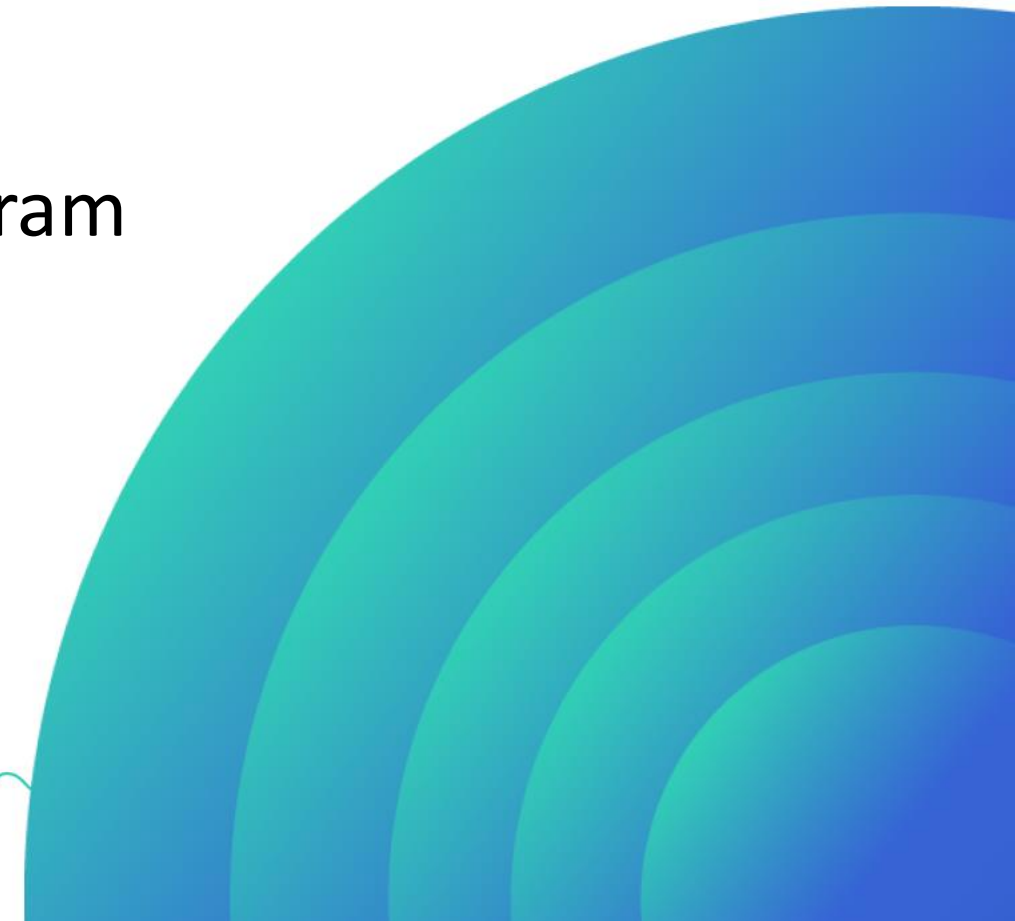
At Authenticx, that means our tools and solutions:

- 1** Scale across a large set of conversations
- 2** Consider your business process and integrates with systems
- 3** Provides AI best practice maximizing your chance of a successful outcome



Powering Scalability:

Level Up Your Quality Management Program
with LLMs





Emir Sabljakovic

Director of Conversation Analysis
Authenticx



**Grace
Woodman**

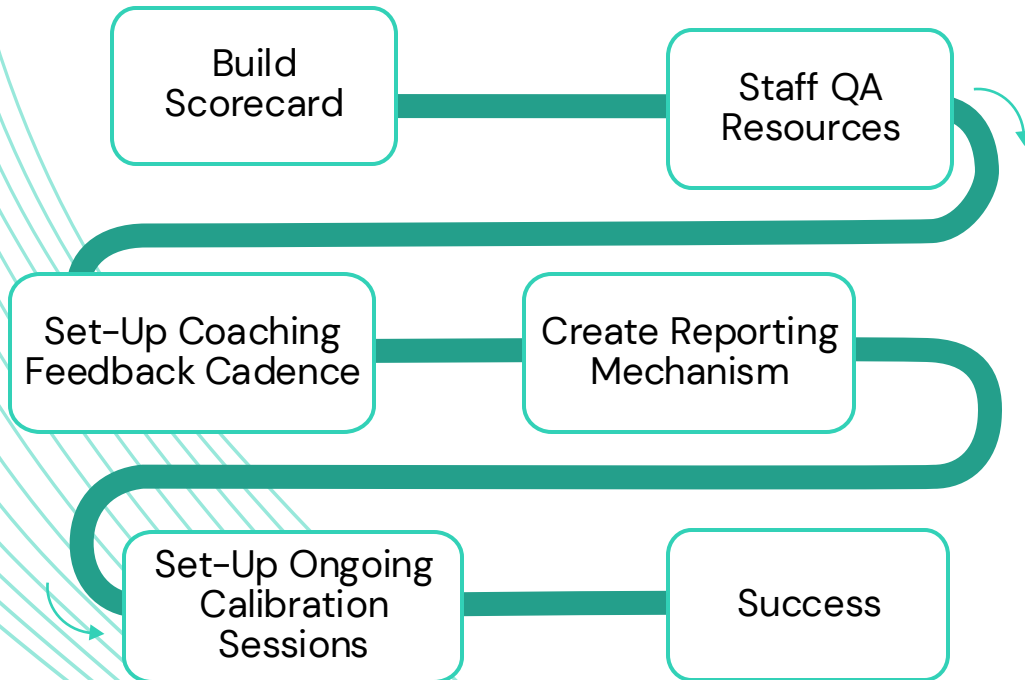
Product Management
Authenticx

Today's Breakout Agenda

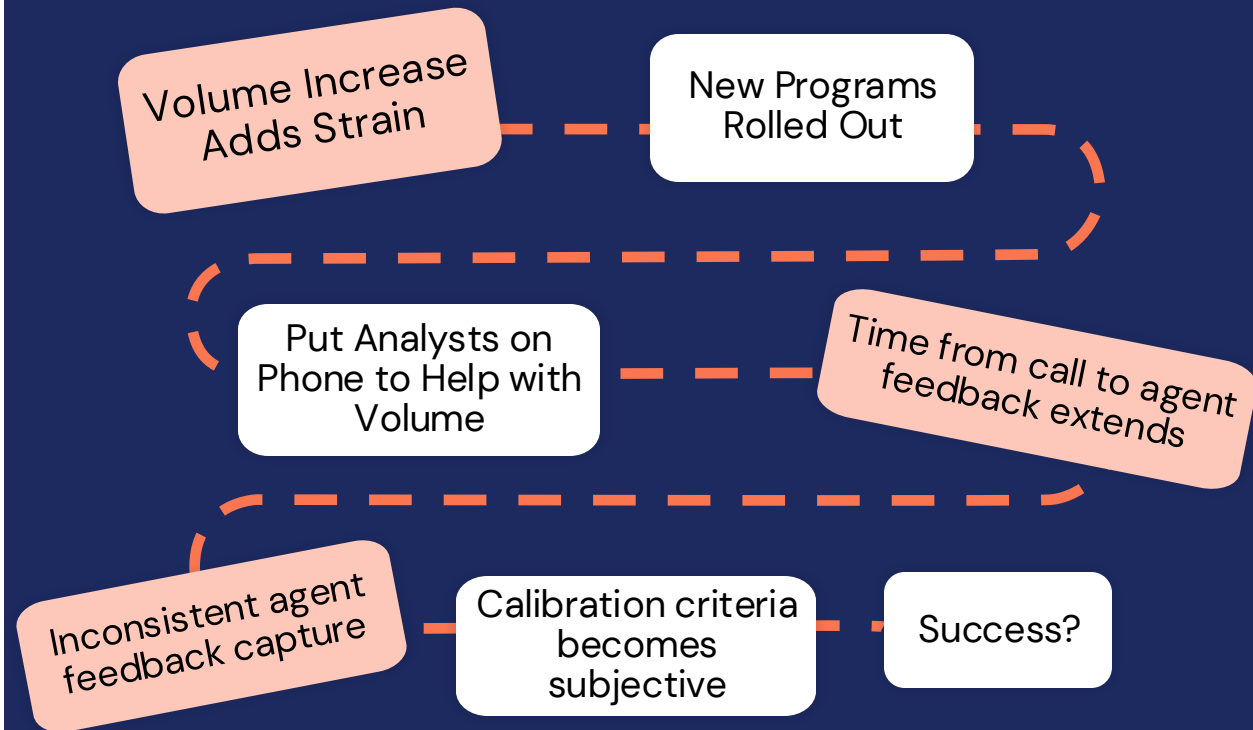
- Traditional Call Center Quality Challenges
- Opportunity with AI
- Build a Foundation
- Practical Ways to Scale

How Traditional Quality Management Programs Start...

Good Intentions



Reality



Traditional Call Center Quality Challenges



Manual review of a small % of calls (1–2%)



Challenges scaling with increasing call volumes



Time-consuming and expensive



Subjective scoring and inconsistency



Delay between patient call and feedback to agent

Opportunity with AI



Up to 100% of coverage



Scalable with increasing volumes



Objective and consistent scoring from agent:agent and call:call



Near-time analysis and coaching to agents



Scalable across thousands of agents



AI and Humans working together

Build a Foundation for AI-Driven Quality Management



Change Management Process



QA Team Enablement



Monitoring & Fine-Tuning



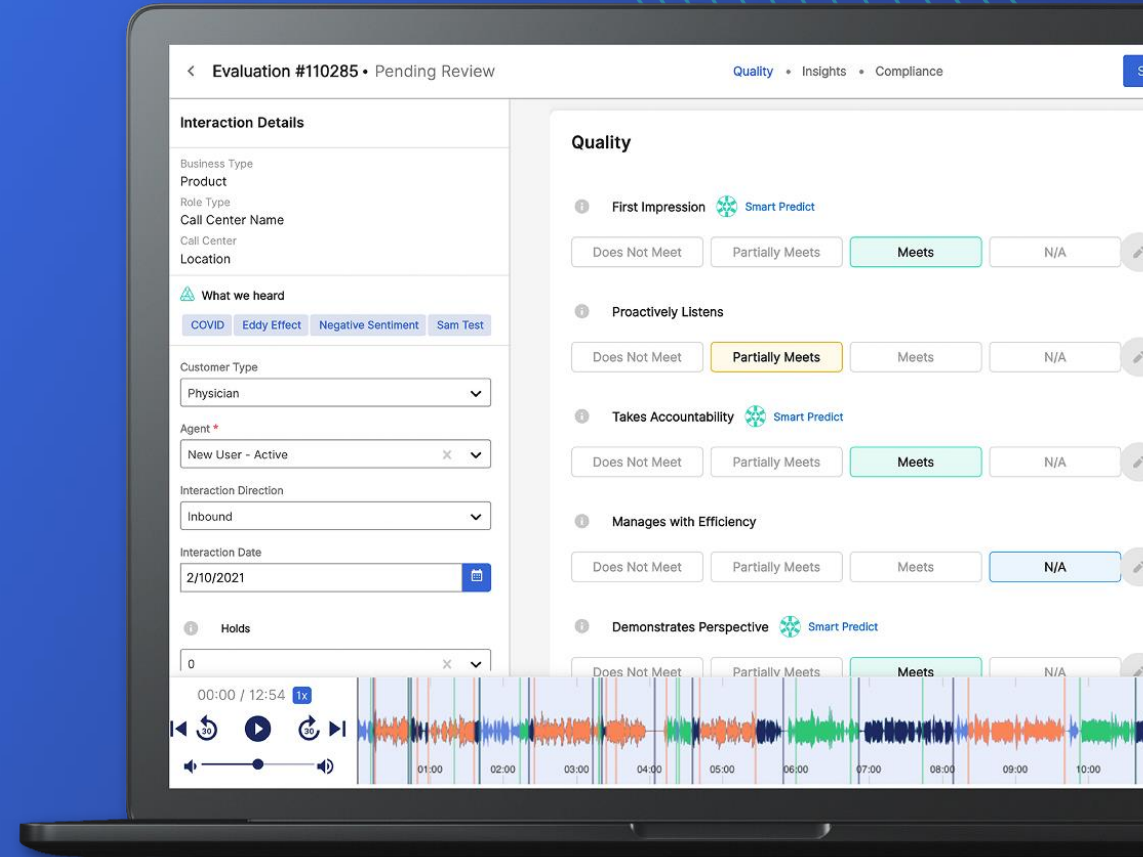
Model Development



Data Labelling



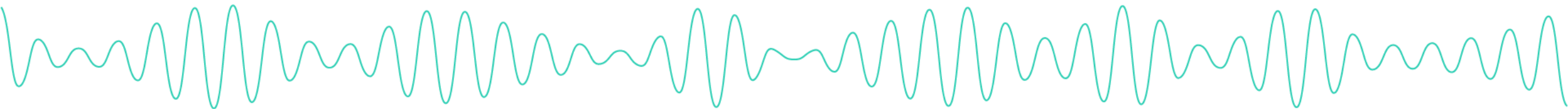
Rubric Design





Practical Ways to Scale

How can AI-Powered QA really work?



In healthcare, every interaction
is a potential
“moment of truth”

RUBRIC

Active Listening

Question

Does the agent utilize active listening skills?

Short Question Text

Active Listening

Criteria

The agent demonstrates active listening and fully understands the nature of the customer's needs, which is made evident by the customer not having to correct the agent or restate their needs.

The customer needing to correct the agent or restate their needs may sound like:

- The customer repeating their initial request without the agent prompting clarification.
- The customer correcting the agent because the agent provided an unrelated response.
- The agent asking for the same information after it has already been stated by the customer.

The agent asks clarifying questions in order to fully understand the customer's needs.

Examples

(-) Customer: "For the second time, [x]."

(-) Customer: "As I said before"

(-) Customer: "Again, [x]"

(-) Customer: "You must misunderstand, I said"

(-) Customer: "That's not what I was asking about"

(-) Agent: "I'm not sure what you mean"

(+) Agent: "Can you tell me more about the insurance denial you received?"

(+) Agent: "Is that correct?"

(+) Agent: "Just so I'm clear"

(+) Agent: "I understand, just to clarify?"

(-) Agent: "I'm not sure what you mean"

This does NOT sound like

If an agent asks for clarification due to a language barrier, background noise, unclear audio, or if the customer proactively provides more details, this will meet the skill requirements.

We are not evaluating accuracy of information that may be shared between agents during warm transfers.

Labels

Meets The agent demonstrates active listening skills.

Does Not Meet The customer corrects the agent or has to restate their needs



Welcome back!

One click away from insights that will inspire action

Authenticx SSO

[Help](#)

[Terms](#)

[Privacy](#)



← Model Test Results

Return to Model list

Publish

Details Builder **Test** Volume

Results (55)

Agreement

Agreed

91%

9%



		Model		
		Meets	Does Not Meet	N/A
Labeled	Meets	25	3	0
	Does Not Meet	2	18	0
	N/A	0	0	8

Yes **25** No **18** N/A **8** No agreement **5**

No Agreement (4)

#1 09:06 | 01/05/2025 Model: No Labeled: Yes

Summary: A member's sister called in to inquire about the status of her sister's claim. The agent informed the caller the claim has been received and it can take 30-45 business days for the claim to be reviewed. The called stated she has been working on the claim since August of 2024 and has been trying to get this resolved since then. The agent transferred the caller to a supervisor for further assistance.

Reasoning: In the provided transcript, the agent's handling of the supervisor and complaint protocols reveals several critical points that need thorough analysis.

Step: Supervisor Transfer: **Supervisor Protocol Requirements** 1. The agent did not initial an offer to speak to a supervisor until after the customer explicitly requested to do so. The customer, Susan, said, "Is there a supervisor I can speak to?" This aligns with the supervisor protocol that the agent should only refer to a supervisor after a direct request from the caller. 2. The agent subsequently agent subsequently prepared to transfer the caller to a supervisor after confirming the request and gathering necessary claim information, indicating the fulfillment of the transfer requirement.

Agreement

Agreed

91%

9%



Model

%

#

Meets

Does Not Meet

N/A

Labeled

Meets

25

3

0

Does Not Meet

2

18

0

N/A

0

0

8

Yes

25

No

18

N/A

8

No agreement

5

#1 09:06 | 01/05/2025

Model: No Labeled: Yes

Summary: A member's sister called in to inquire about the status of her sister's claim. The agent informed the caller the claim has been received and it can take 30-45 business days for the claim to be reviewed. The called stated she has been working on the claim since August of 2024 and has been trying to get this resolved since then. The agent transferred the caller to a supervisor for further assistance.

Reasoning: In the provided transcript, the agent's handling of the supervisor and complaint protocols reveals several critical points that need thorough analysis.

Step: Supervisor Transfer: ****Supervisor Protocol Requirements**** 1. The agent did not initial an offer to speak to a supervisor until after the customer explicitly requested to do so. The customer, Susan, said, "Is there a supervisor I can speak to?" This aligns with the supervisor protocol that the agent should only refer to a supervisor after a direct request from the caller. 2. The agent subsequently agent subsequently prepared to transfer the caller to a supervisor after confirming the request and gathering necessary claim information, indicating the fulfillment of the transfer requirement.


Step: Complaint Protocol: ****Complaint Protocol Requirements**** 1. The customer has expressed their frustration regarding the length of time taken for the claim process and mentioned that they have been dealing with this since August. However, there is no indication in the transcript that the customer has reached out to any external complaint entities. Therefore, the agent should have advised the customer to first file an internal complaint with WorldTrips before considering external options. 2. At no point does the agent explicitly promote or mention any external complaint channels such as DOI, BBB, or the involvement of lawyers, which aligns with the standard protocol in this aspect. 3. Given that it is not clear if the customer contacted an external resource before the call, the agent should have redirected Susan to the internal complaint processes offered by InsurAnts. Since there's a mention of escalation due to the lengthy claim process but no suggestion of engaging external entities, the agent did not adhere entirely to the complaint protocol. In summary, while the agent successfully followed supervisor protocol by only transferring after an explicit request, they failed to meet the complaint protocol requirements by not addressing the internal processes first and not guiding the customer appropriately in the claim complaint handling process. Since there was a failure to meet the criteria for complaint handling, the overall evaluation is "No."

[Go to Conversation](#) 

[View Labeling](#)

[View Transcript](#)

Quality Score

 Does the agent utilize active listening skills?  Smart Predict

[View Reasoning](#) 

Does Not Meet

Partially Meets

Meets

N/A



[Model Reasoning](#)



In this interaction, the agent effectively demonstrated active listening and a clear understanding of the customer's needs. A "Meets" score is appropriate based on the following observations:

- 1. The Agent Responded Appropriately to the Customer's Initial Request:** The customer clearly explained their need during the early portion of the call, and the agent responded with relevant follow-up actions without requiring the customer to restate or reframe their concern. This indicates the agent accurately received and processed the initial information.
- 2. No Repetition or Corrections from the Customer:** At no point during the call did the customer have to correct the agent, repeat their request, or clarify due to a misunderstanding. The conversation flowed naturally, with the agent maintaining alignment with the customer's expressed need throughout the interaction.
- 3. Use of Clarifying Questions to Confirm Understanding:** The agent asked relevant clarifying questions when appropriate, which helped confirm their understanding of the customer's concern and avoid assumptions. These questions were contextually appropriate and helped move the conversation forward efficiently.

The agent exhibited strong active listening skills by accurately interpreting the customer's need, responding accordingly, and keeping the conversation focused without requiring repetition or correction. This aligns with the defined expectations for this quality standard and supports a "Meets" rating.



Q3 Quality: Active Listening

+ Add Card



▼ This Quarter



This Quarter:

7/1/2025 - 9/5/2025



Service Hierarchies



Apply



Active Listening Model Results

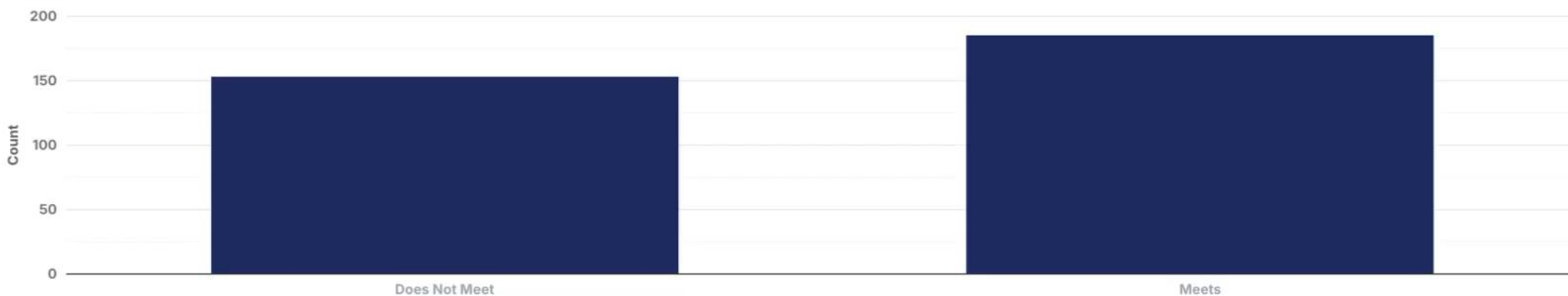


Active Listening



%

#



ANALYZE WITH KBO +

Copy

Refresh

Hide Insights

Analyze All Results



Active Listening Model Results Over Time - Weekly



Dallas Dixon

Cancel

Save as Draft

Complete

Compliance Score

66.7%

Accuracy Score

60.0%



Generate Notes

Review Evaluations

[Evaluation #1248593](#)

Coaching Notes

What did the agent do well?

Add feedback...

What areas of opportunity exist?

Add feedback...

Focus Area

Search... 



Generate Notes

Increase feedback on agents 4-5x

Coaching Notes

What did the agent do well?

The agent demonstrated strong active listening skills throughout the interaction. They accurately identified the customer's needs early in the call and responded with relevant information without requiring the caller to repeat or clarify their request. The agent maintained focus, used verbal cues to show engagement, and asked appropriate clarifying questions to confirm understanding. These behaviors helped build rapport and ensured the issue was addressed efficiently.

What areas of opportunity exist?

While the agent's listening skills were effective overall, there may be opportunities to further enhance clarity by briefly summarizing or paraphrasing the customer's main concern before responding. This not only reinforces understanding but can also help avoid miscommunication in more complex calls. Additionally, continuing to use open-ended questions when exploring the customer's needs can further demonstrate attentiveness and ensure all concerns are addressed in one pass.

Evaluating Quality Management Performance



Rubric

How we inform AI and human analysts to evaluate.

Goal:
Objectivity



Model Builder

How we support and maintain automated evaluations.

Goal:
Consistency



Evaluation

Where we score calls using AI models.

Goal:
Scalability



Signals

How we see results and trends using AI models.

Goal:
Visibility

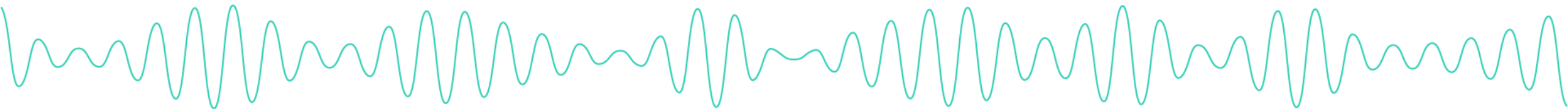


Coaching Notes

How we can provide feedback using AI models.

Goal:
Improvement

So, where do I start?



Thank You!



Download the Resource!

Ignite the power of AI: “What’s in it for me?”

Jack Lampka
AI Keynote Speaker & Advisor

Voices25

September 2025



Jack Lampka

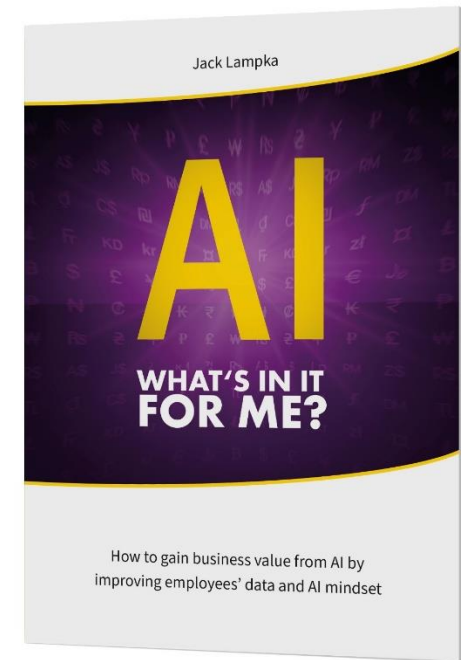
AI Keynote Speaker & Advisor

www.jacklampka.com/

www.linkedin.com/in/jacklampka/

Keynotes

**Advice &
Sparring**



Amazon & Apple Books

The Potential of AI

Patient Support and Safety in a Shifting Regulatory Landscape

Kip Zurcher, Chief Financial Officer & Chief Privacy Officer
Erika Sylvester, General Counsel



Kip R. Zurcher

CFO & Chief Privacy Officer



Erika Sylvester

General Counsel &
Head of Compliance

DISCLAIMER

The information provided in this presentation is intended to convey general information and is for educational purposes only. It is not intended to create an attorney-client relationship. The contents of this presentation should not be relied upon as legal advice for any specific factual pattern or situation. Laws and regulations are continually changing, and they can be interpreted only in light of particular factual situations. If you require legal advice or representation, please consult with your legal department or external counsel who can address your specific needs.

Illuminate

Regulatory Landscape

Explore

Themes in Regulations

Ignite

Our Journey Ahead

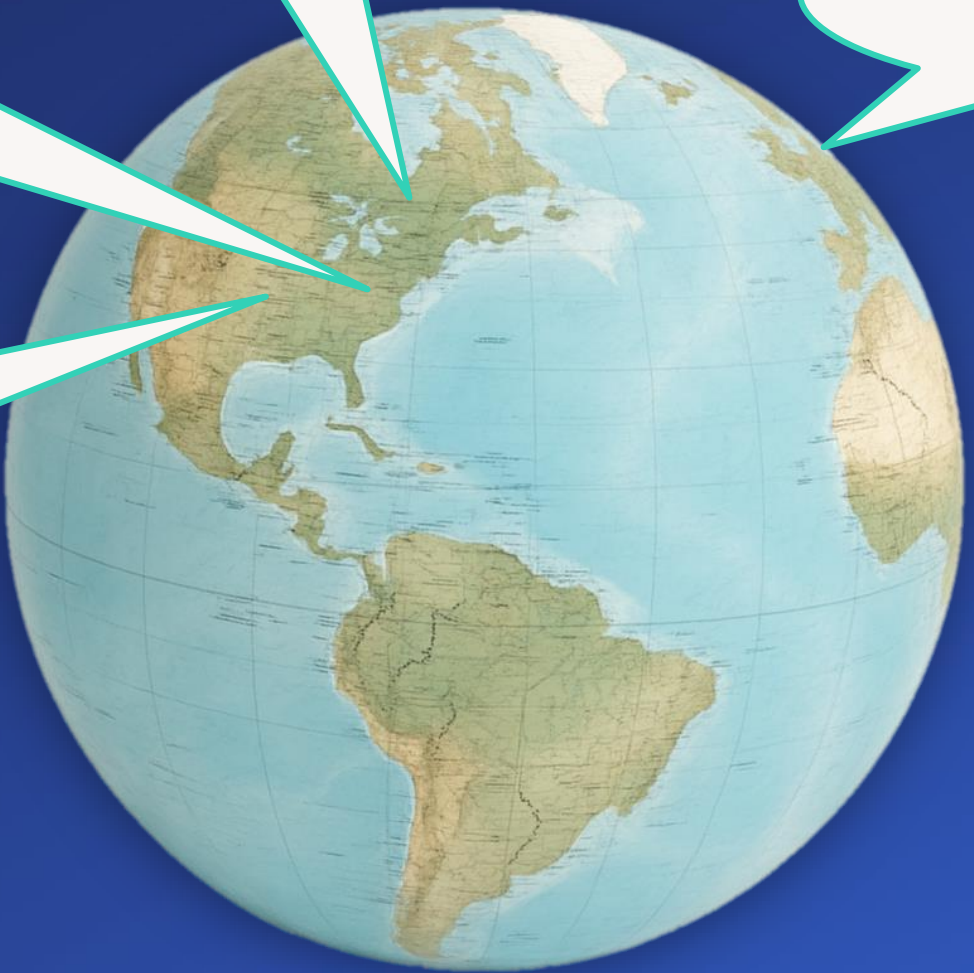


US
Federal

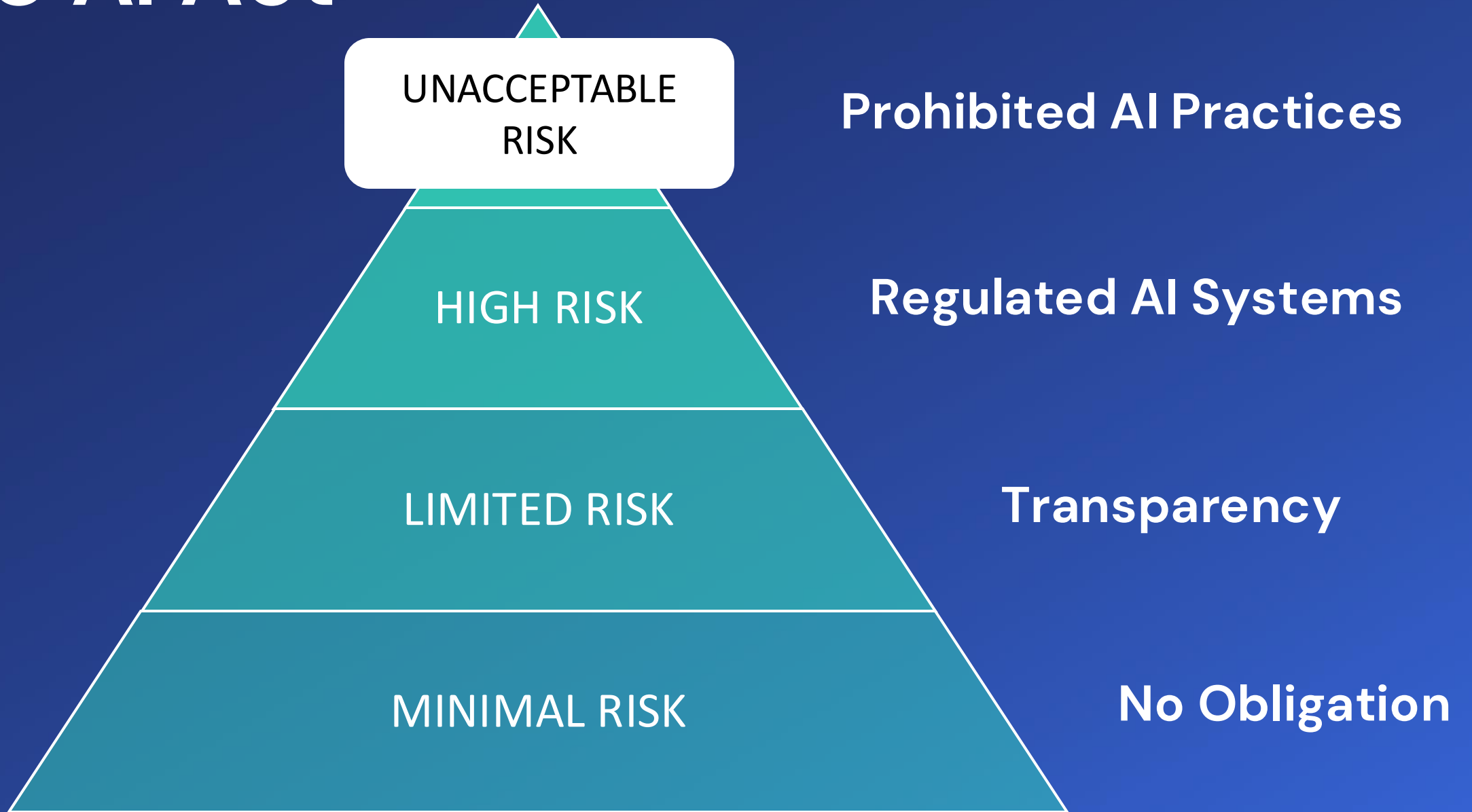
FDA

Europe

US
States



EU AI Act



EU Implementation & Enforcement

AUGUST 2024



EU Act enters into force on **August 1, 2024**

FEBRUARY 2025



First compliance deadline

(AI literacy training; Prohibited AI systems fully banned; transparency rules released)

AUGUST 2025



Most Recent Implementation:

GPAI Rules place – Claude, OpenAI

AUGUST 2026



Enforcement of GPAI Rules can begin – compliance framework/obligations for most high risk AI systems become applicable

THROUGH 2030

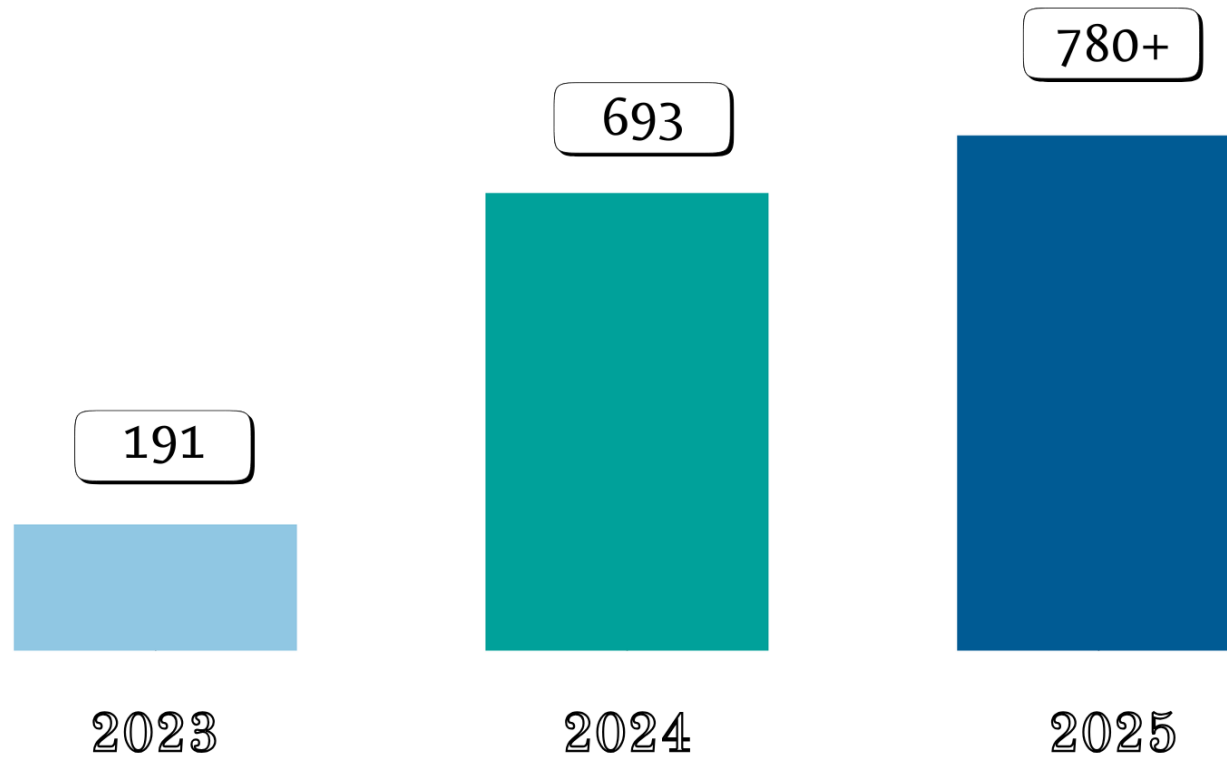


Full Implementation

AI State Legislation Surge

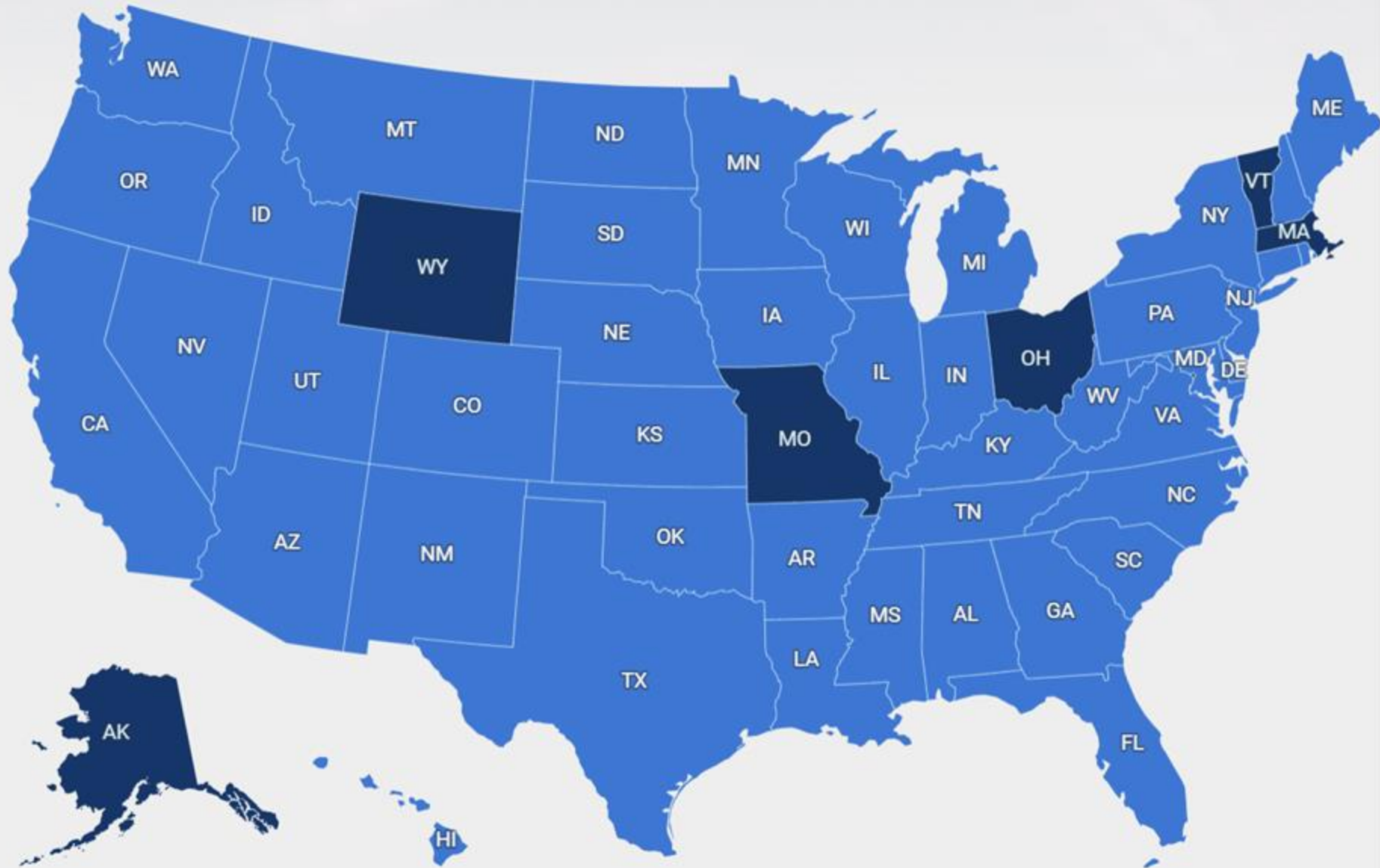
AI Bills Enacted 2023–2025

US
States



Last Updated: July 1, 2025

- Enacted Legislation
- No Enacted Legislation



US
Federal

THE WHITE HOUSE



Winning the Race

AMERICA'S AI ACTION PLAN

JULY 2025

Accelerate Innovation

Build AI Infrastructure

International AI Diplomacy & Security

FDA AI Guidelines

FDA



Guidance for (1) AI Developers, (2) Healthcare Industry



Focus on protecting the public health & ensuring AI models used in decision-making are trustworthy



Subject to finalization

FDA Approach

ASSESS RISK

- What is the potential impact on a patient? (Decision Consequence)
- How much do we rely on the AI for the final decision? What is the role of Humans? (Model Influence)

USE HIGH QUALITY DATA

- Principle: 'Garbage In, Garbage Out'
- Ensure data is complete, accurate, and represents diverse populations.
- Actively work to find and reduce algorithmic bias

MONITOR & MAINTAIN

- AI models are not 'set it and forget it'.
- Plan for ongoing monitoring and updates to prevent 'model drift'.
- Be transparent and ready to explain how models work.



Illuminate

Regulatory Landscape

Explore

Themes in Regulations

Ignite

Our Journey Ahead

Bias

Transparency

Explainability

Consent

Humans-In-The-Loop

Bias

DEFINITION

Systemic errors in AI systems that **create unfair outcomes** for certain groups of people

RISK FACTOR

Business: Legal, Reputational, Market

Operational: Clinical harm, healthcare disparities, diagnostic errors

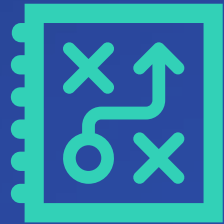
Ethical: Stereotyping, exclusionary

ACTION

Data-Centric Controls
Model-Centric Controls
Managing Deployment

Transparency

Explainability



Consent



Explainability

Popular Public Models

- Open sourced
- Online Training
 - Learn from everything it consumes
- General purpose language predictions

Authenticx[®]

- Close sourced
- Offline Training
 - Only learns from labeled data
- Provides structure to unstructured data set
- Purpose built for healthcare analysis



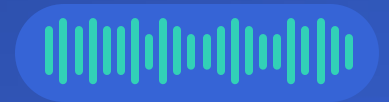
Consent

Consult with your legal team





Humans in the Loop



MITIGATE BIAS



Why Include Humans?

ACCURACY

FEEDBACK

MANAGE

Our Humans in the Loop



Development

- Rubric design & development
- Training and label creation



Deployment

- Model development, refinement, and release
- Fine tuning
- New model versions



Monitoring

- Drift monitoring
- AI validates research / analysis
- Feedback loop to Product & Data Science
- IRR (quality score on human listening)



Services

- Targeted Listening
- Insights Sessions
- Client Success (Classifier builds, Dashboards, research with KBo, and more)
- Evaluation Services



Illuminate

Regulatory Landscape

Explore

Themes in Regulations

Ignite

Our Journey Ahead

The Tension

Innovating Early vs. Regulation

Improve Px / Cx
Create Ops Advantage
Move up Learning Curve



Uncertainty
Compliance Re-work
Change Management
Costs of Missteps



Data Privacy



1974, 1996, 2003, and 2013



AI regs include privacy provisions



We survived GDPR, CCPA, PIPEDA, and all have been (are being) amended

Where We're Headed



Provider/Developers & Deployers



Increasing FDA scrutiny



Global precedents will shape US policy



States are scrambling

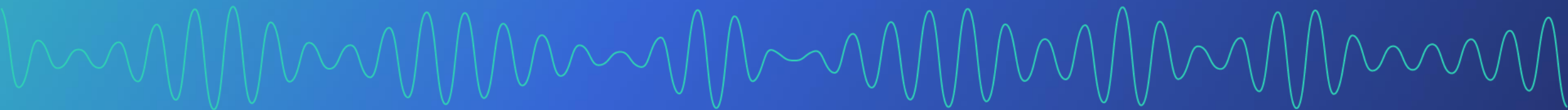


Industry-specific Standards

Q&A



Download the Resource!



PUT AI TO WORK

Prompt Engineering 101

Crafting Effective Prompts to Get the Most Out of AI



Chat-based AI Assistants are one of the most common ways AI has entered our day-to-day

What are these assistants good for?



Structure Data



Analyze at Scale



Optimized Search



Brainstorm Content

"Before AI, it was pretty easy to just accept that there would be limited documentation on how something worked because you could just ask your colleague.

AI agents don't have this luxury. AI agents don't have the benefit of all the situational awareness and osmosis that people have.

By default, they don't know your goals, company standards, style, other projects going on, and so on."

Aaron Levie, CEO at Box

The way we interact with + give instructions to these AI Assistants are through "prompts"

ChatGPT 5 ▾

I need you to help me craft a presentation on "prompt engineering" for a client conference.

The presentation will be 40 minutes in length, and should be engaging, educational, and light. The goals of the session are:

1. De-mystify prompt engineering |

Cancel

Send

TODAY

3 Types of Prompts We Will Review

Simple Questions

"What is the capital of the state of Indiana?"

Structured Request

"Write me a summary of Product X's value like a product marketer"

Multi-Step Process

"Ingest this excel sheet of data, pull trends, summarize them, and then provide the data in a structured table view that includes columns for A, B, C."

The quality of the prompt dictates the quality of your result or response

what makes a good prompt for you?

A good prompt helps me give you the most accurate, relevant, and useful response possible. Here's what makes a prompt effective:

1. Clarity and Specificity

- **Be clear about what you want.** Avoid vague questions like "Tell me about AI" if you're really interested in, say, "the differences between supervised and unsupervised learning in AI."
- **Examples:**
 - ❌ Vague: "Write a report."
 - ✅ Clear: "Write a 1-page summary of recent trends in healthcare AI for an executive audience."

2. Context

- **Give me background information** relevant to your task. This helps tailor the tone, content, and format.

Ask anything

+ Tools



- Be clear and specific
- Provide context
- Provide guidelines and guardrails
- Iterate and collaborate

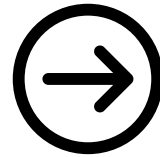


That can feel like
a lot to remember

ZOOM IN

We already do this stuff!

"I would like
a burger"

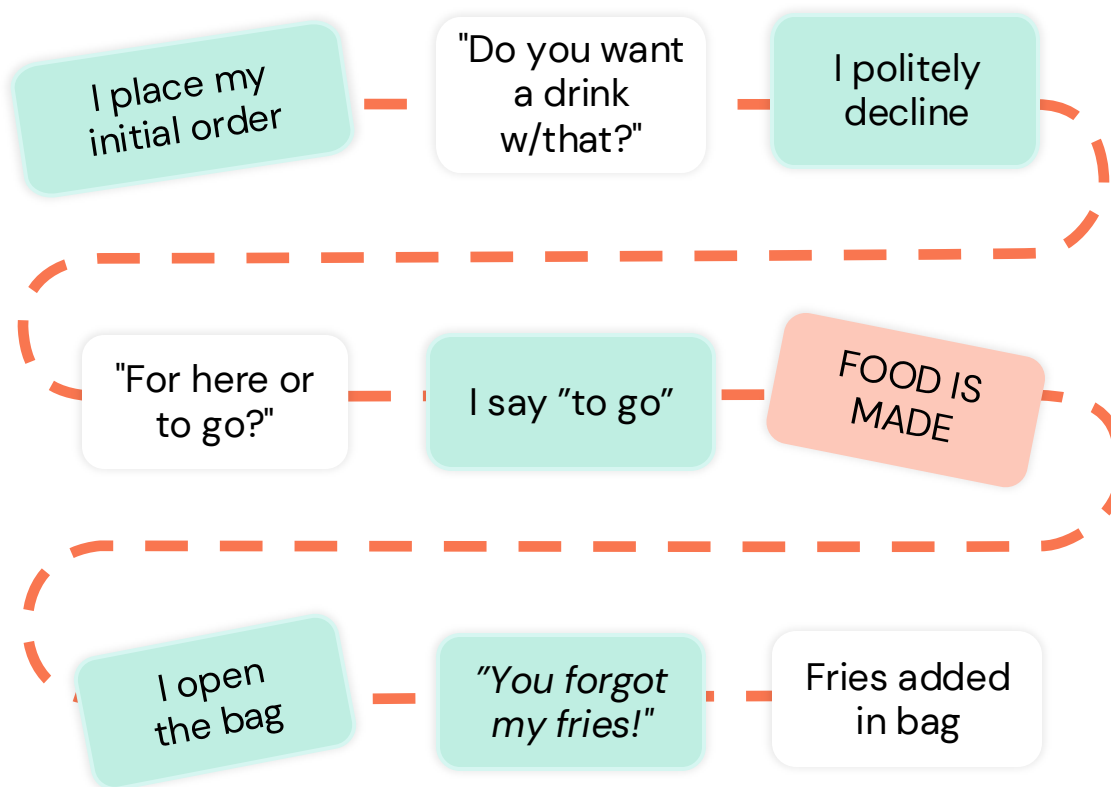


Exactly what
I wanted

No one would reasonably expect this!

ZOOM IN

We already do this stuff!



SHOW & TELL

Let's Try to Build a Trip
With ChatGPT



ChatGPT 4o ▾



What can I help with?

+ Ask anything



ChatGPT can make mistakes. OpenAI doesn't use Authenticix workspace data to train its models.



Great news: we can still make
things even easier!

The value of generic AI compared to specialized AI

ChatGPT 5 ▾

What can I help with?


+ Ask anything



 KBo

New Chat



 Hello! I'm KBo, your Authenticx AI assistant. I'm here to help you discover meaningful insights. How can I assist you today?

What topics are causing an increase in call duration?

Who has been calling this month?

Context: All Conversations ▾

What can I help you with?



ZOOM IN

Generic AI

ChatGPT 5 ▾

What can I help with?

+ Ask anything



AUDIENCE

Every possible user in the world

CONTEXT

- Everything on the internet
- Everything ever told to it

RESULT

Need for extremely precise and explicit prompts to deliver expertise or depth

ZOOM IN

Specialized AI



KBo

New Chat



Hello! I'm KBo, your Authenticx AI assistant. I'm here to help you discover meaningful insights. How can I assist you today?



What topics are causing an increase in call duration?

Who has been calling this month?

AUDIENCE

Industry, persona, etc.

CONTEXT

- Specific to user
- Specific to function

RESULT

Ability to deliver more precise and relevant results with less upfront context

Specialized AI operates from a more context rich starting point

REDUCE

Requires less basic context setting

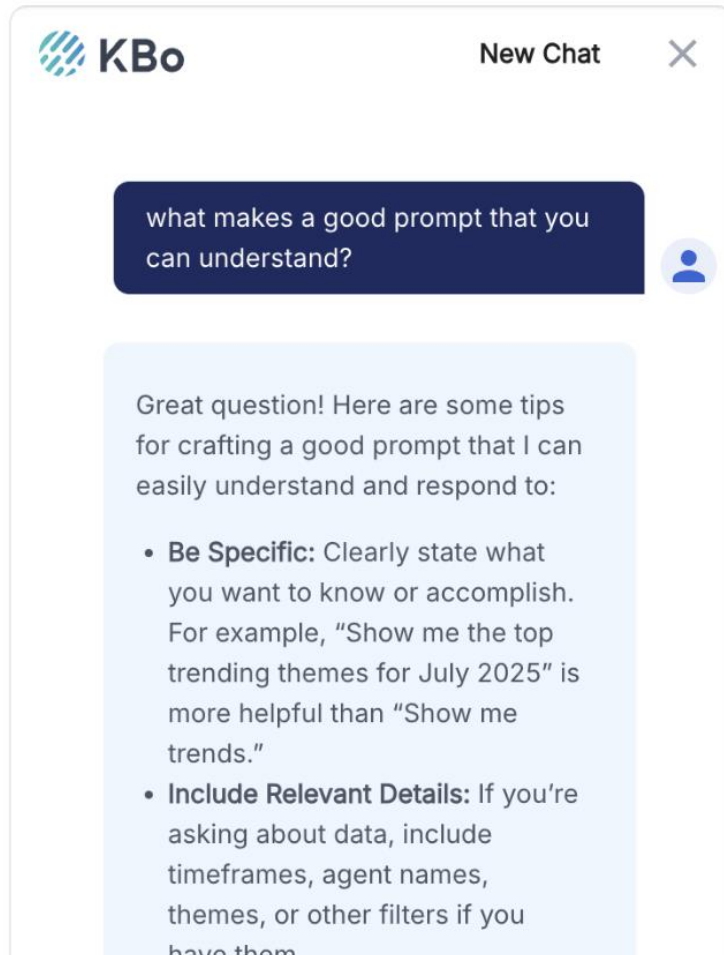
ENHANCE

Brings a depth of expertise to responses

EXPEDITE

Improves the quality + depth of first response

Let's see this in practice with the Authenticix AI Assistant: **KBo**



The screenshot shows a chat window titled "New Chat" with the KBo logo. A user asks, "what makes a good prompt that you can understand?". The AI response provides tips for crafting prompts, including being specific and including relevant details like timeframes and agent names.

KBo New Chat ✕

what makes a good prompt that you can understand?

Great question! Here are some tips for crafting a good prompt that I can easily understand and respond to:

- **Be Specific:** Clearly state what you want to know or accomplish. For example, "Show me the top trending themes for July 2025" is more helpful than "Show me trends."
- **Include Relevant Details:** If you're asking about data, include timeframes, agent names, themes, or other filters if you have them.

1

"Specific" defined in Authenticix terms
Examples include "Trends" and "Themes"

2

"Details" are 3x more granular
Examples include "Dates" and "Agent Names"

3

Healthcare context fully present
Clear language referencing Contact Types



Home

Discover Signals

Evaluation Reporting

New Dashboard

Themes and Topics

Eddy Reports

Trends Highlights

Contact Types

MY DASHBOARDS

Competitive Insights

Patient Journey Insights

Safety Events

SHARED DASHBOARDS

Team Performance

Time to Fill Overview

Themes and Topics

Filter



8/29/2025

9/5/2025

Service Hierarchies

Apply

Total Conversations

1,271

53%

Avg Call Duration with an Eddy

3m 2s

2s

Conversations with an Eddy

21.64%

59%

Topics on the Rise

Prescription Refill

2

200% GROWTH

New

Copay Card Assistance

2

200% GROWTH

New

Medication Delivery Issue

2

200% GROWTH

New

Copay Card Assistance Issue

1

100% GROWTH

New

Trending Topics

Use this report to see how topic volumes have changed within the selected time period.

Topic	Theme	Change	Percent	Volume
Medication Side Effect	Side Effect Management	49%	25%	321
Copay Card Issue	Copay Card Management	34%	14%	188
Medication Authorization	Medication And Prescription Ma...	55%	6%	84
Prescription Issue	Medication And Prescription Ma...	51%	5%	67



What did we notice?

The prompts were significantly **shorter**, but not any **less effective**.

We didn't have to do as much context setting

Higher quality answers right away: giving us **usable insights**.

We are operating at a deeper level

Conversations **sampled and analyzed** could be **refined** as we went.

We could iterate seamlessly

Search Filters ▼ Saved Filters

0 Filters Applied

STANDARD FILTERS

Interaction Date Range

8/29/2025 - 9/5/2025

Call Duration

Any Duration

Hierarchy

Service Hierarchies

Classifiers

Contains

Search...

Words Or Phrases

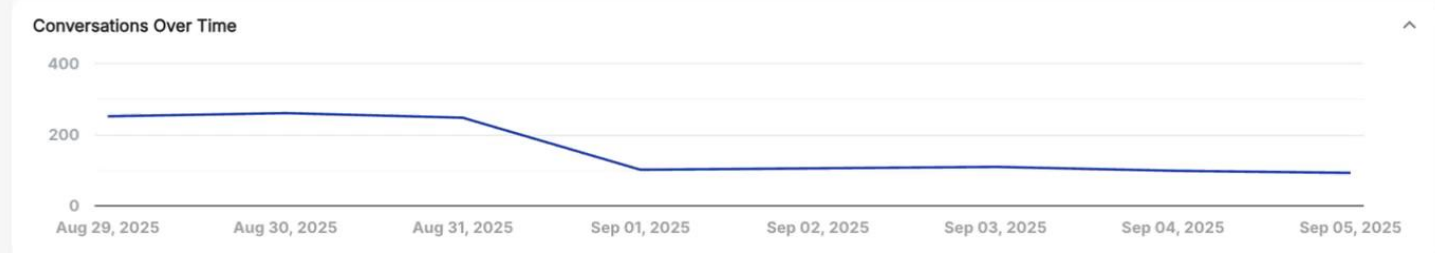
Contains

+ Condition

+ Manage Filters Cancel Apply

Latest Conversations (1,271)

Analyze Trends Sort by



Dana Hernandez 04:05 | 09/05/2025

Conversation Summary:
 The patient was calling because her medication has not arrived. The agent advised that she would escalate the issue as a lost item and open an investigation with the shipping provider. The agent also advised she would expedite a replacement order for the patient. The agent confirmed the patient only has 3 pills left from her current supply of medication and is worried about running out. The agent set up a text reminder for the patient to call her doctor to have them...

Show More

Patient Eddy Effect Signal Sentiment Start: Negative Sentiment End: Neutral HIPAA Compliant On Treatment +1

Lori Elliott 03:40 | 09/05/2025

Conversation Summary:
 The patient was calling because she was experiencing unexpected side effects since she started her new prescription. The agent advised that she would like to file an adverse event report and coordinate with the safety team to report the side effects. The agent provided the patient with the lot number from the medication bottle to complete the safety report. The agent placed the patient on hold to check with the pharmacy to obtain the lot number. The agent...

Show More

Patient Safety Event Acknowledged Safety Event Identified Adverse Event Sentiment Start: Neutral Sentiment End: Neutral +3

FORREST AND THE TREES

Every level of detail in minutes

1

1,271 Conversations

In the past month (my filtered timeframe)

2

45 Conversations

In the past month w/specific criteria

3

3 Conversations

Past month, specific criteria, for training

Quickly analyze trends and patterns across calls with specific attributes

Breakdown trends by criteria such as business line, brand, team, or other defined attributes

Analyze calls of various durations to help establish some shared attributes or variables

Analyze wasted talk time, Eddy Prevalence, and drivers of specific issues within conversations

Distill agent performance trends and produce additional coaching notes based on performance

Get answers about Authenticx platform, general healthcare terminology or process questions, etc.

ACCESSIBLE AUTOMATION

AI Assistants are powerful

And these tools are largely accessible and widely accepted in the workplace

POWER OF THE PROMPT

Prioritize prompt quality

Results will only be as good as the instructions: AI relies on you to provide clear instructions

DON'T OVERTHINK IT

It's about communicating

Prompts come down to communication. You do a lot of the things required of a prompt with people!

CHEAT CODES EXIST

Leverage specialized AI

You can improve the quality and depth of your first results by using existing context



Voices25

Thank you!

