

CASE STUDY

J&B Medical Supply Automates 75k Conversations a Month with AI Virtual Agent



96%

engagement rate



70%

authentication rate



64%

monthly savings

CHALLENGE

In compliance with HIPAA regulations, J&B Medical employs a multi-factor authentication process for all callers, but due to many calls coming from caretakers, nurses, or family members on behalf of patients, **authentication times can be frustratingly long**, taking human agents about three minutes on average. Moreover, J&B faced **difficulties retaining and hiring new agents**, leading them to rely on outsourcing to manage call volumes due to unsustainable agent turnover.

Guarantor?

DOB?

Patient ID?

Address?



AT A GLANCE

Challenges

- Patient authentication complications due to calls coming from caretakers, nurses, etc.
- Long hold times
- High live agent turnover

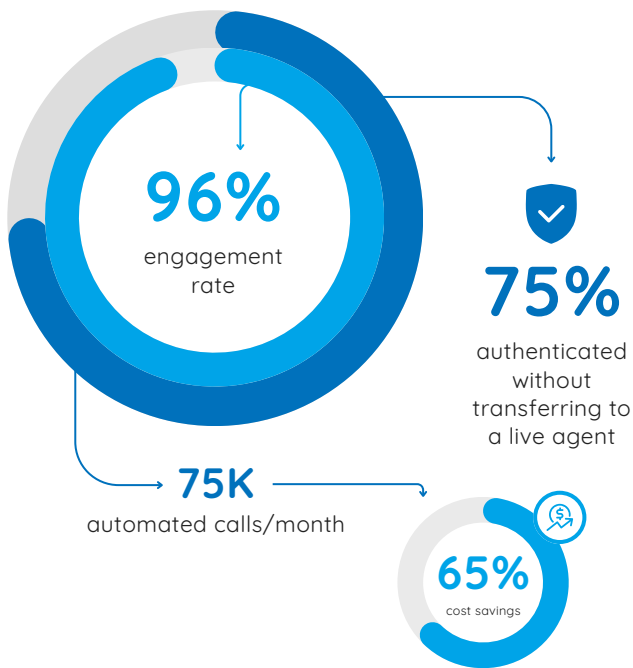
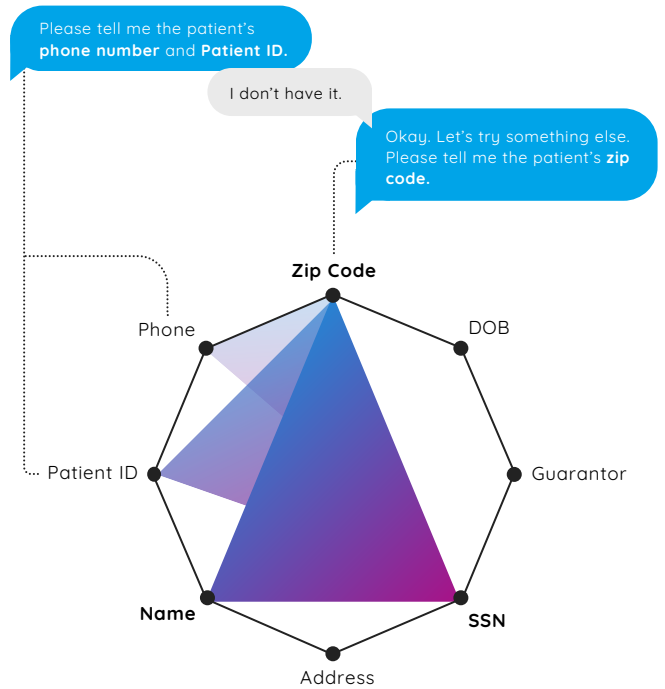
Benefits

- Engagement with virtual agents on 96% of calls
- 75,000 calls automated/month
- 65% cost savings in the contact center
- 75% of calls authenticated without transferring to a live agent

SOLUTION

In cooperation with J&B's customer service team, SmartAction developed a **HIPAA-compliant, comprehensive automation approach** that incorporated **industry best practices** J&B's human agents had been using.

The authentication self-service solution uses natural language understanding and artificial intelligence to triangulate three pieces of patient data out of a possible six to eight. These data elements positively identify the caller. Since some of the data points are not always top-of-mind (e.g., Patient ID), the system simultaneously asks for one of two data elements to increase the odds that the requested data is something the caller knows. When a caller does not have some piece of information, the AI-powered engine can move on to ask for a different element.



RESULTS

In just a few weeks post-launch, the AI virtual agent **engaged with 96% of callers**, and nearly **75% of them were fully authenticated** without transferring to live agents. Data gathered was seamlessly passed to human agents for optimal customer satisfaction, reducing self-service authentication time by over two minutes.

By automating **75,000 monthly calls**, J&B **saved 65% in call center costs**, eliminating the need for agent churn and outsourcing, and allowing them to retain their most valued agents for more complex conversations.



“SmartAction has been a **long-term partner** and has allowed us to **automate many of our simple to medium complexity calls**, freeing up our human resources to focus on more value-added activities. SmartAction has been a **true collaborator** as we continue to evolve our business.”

Dr. Stephen Shaya
CEO, J&B Medical