Nuance Patient Engagement Solutions 2023

Improving Patient Engagement through Omnichannel Engagement Technology

Performance Report | **August 2023**

NUANCE®

Nuance Patient Engagement Solutions: Improving Patient Engagement through Omnichannel Engagement Technology

Why This First Look?

Healthcare organizations need effective patient-provider communication and engagement solutions. Nuance Patient Engagement Solutions (PES) aims to increase patient engagement and improve the consumer experience through omnichannel engagement technology and intelligently automated personalized interactions. Additionally, the software can help facilitate better patient interactions through integration with core systems (e.g., EHR, revenue cycle, and CRM solutions). This report offers a first look at customer experiences with Nuance PES.

What Does Nuance Patient Engagement Solutions Do? (a customer explains)

"Nuance provides tier-one support for our digital front door for patients to access their medical health information. The app allows patients to communicate with their providers, schedule appointments, and launch video visits. The tier-one support from the vendor includes basic troubleshooting. If patients are having issues with establishing new accounts or functionalities within the app . . . the issues go to Nuance to be triaged. If the issues are more complex, then the vendor escalates things to our team."
—Manager

Bottom Line

All interviewed customers are satisfied overall and forecast that they will feel high satisfaction in the future. Respondents appreciate Nuance's expertise and partnership, highlighting their responsive management, good reporting tools, and service coverage. One respondent reports being nickel-and-dimed. Additionally, customers note Nuance could improve their delivery of new technology and overall product offering. These improvements may help customers better feel they are receiving their money's worth.

Key Competitors (as reported by Nuance)

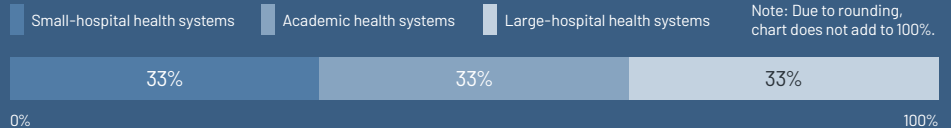Providers of digital contact center services, CRM vendors, niche solution providers

Top Reasons Selected

Prior relationship, incumbent vendor, good customer support, easy implementation process

Number of Customers Interviewed by KLAS

5 individuals from 3 organizations (Nuance shared a list of 9 unique organizations)

Survey Respondents—by Organization Type (n=3)

Small-hospital health systems	Academic health systems	Large-hospital health systems

Note: Due to rounding, chart does not add to 100%.

33%	33%	33%

0%   100%

Nuance Patient Engagement Solutions
Customer Experience: An Initial Look

Overall Customer Satisfaction (n=5)

(100-point scale)
20%
80%
- Highly satisfied (90.0+)
- Satisfied (70.0–89.9)
- Dissatisfied (<70.0)

Time to See Outcomes (n=5)

20% **20%**
60%
- Immediately
- Within 6 months
- 6–12 months
- Over 12 months
- No outcomes yet, optimistic
- No outcomes yet, pessimistic

Outcomes Expected by Customers

⊘ Achieved	★ Unexpected outcome
⧗ Pending	✕ Not achieved

Reduced burden on customer resources due to 24/7 call center and tier-one service	⊘
Increased patient satisfaction	⊘
Quicker short-notice patient connection with telehealth providers	⊘
Decreased patient wait times	✕
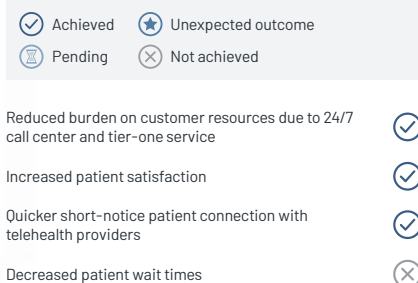
Key Performance Indicators (1–9 scale)

Supports integration goals	Product has needed functionality	Executive involvement	Likely to recommend
A	**A**	**A+**	**A+**
(n=5)	(n=5)	(n=5)	(n=5)

Would you buy again? (n=5)
- ● Yes ● No

100%

Software grading scale
A+ = 8.55–9.0   B+ = 7.65–7.91   C+ = 6.75–7.01   D+ = 5.85–6.11   F = <5.22
A = 8.19–8.54   B = 7.29–7.64   C = 6.39–6.74   D = 5.49–5.84
A- = 7.92–8.18   B- = 7.02–7.28   C- = 6.12–6.38   D- = 5.22–5.48

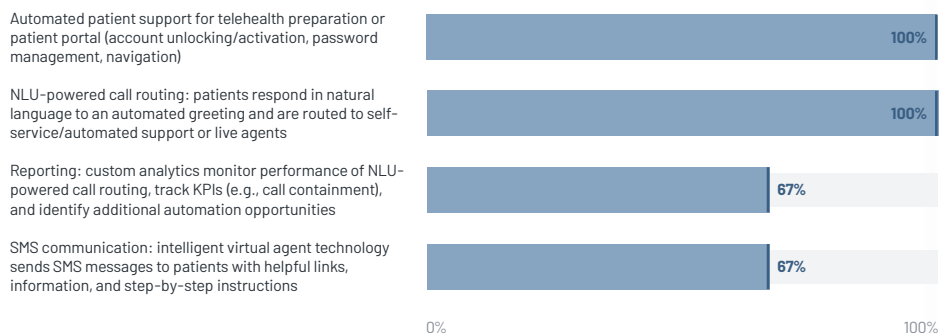### Adoption of Key Functionality—by Organization

Percentage of interviewed organizations using functionality (n=3)

Automated patient support for telehealth preparation or patient portal (account unlocking/activation, password management, navigation)	**100%**
NLU-powered call routing: patients respond in natural language to an automated greeting and are routed to self-service/automated support or live agents	**100%**
Reporting: custom analytics monitor performance of NLU-powered call routing, track KPIs (e.g., call containment), and identify additional automation opportunities	**67%**
SMS communication: intelligent virtual agent technology sends SMS messages to patients with helpful links, information, and step-by-step instructions	**67%**

0%   100%

Strengths

Knowledgeable, expert team offers a good partnership

"Nuance's strength is that they were a major vendor in the voice-recognition technology area even before Microsoft purchased them. . . . They have a lot of experience with automated responses. . . . Nuance's people knew what they were talking about and what they could offer. Another strength is that we have a pretty good relationship with the vendor. They were able to work with our team in very granular detail to ensure that we went over use cases, and they specifically pointed out which questions needed to be directed at real people versus which questions could be handled automatically. Nuance is a good partner." —Director

Partnership is driven by a responsive management team

"[Nuance's] people have been exceptional. The vendor has been doing a tremendous job, and I think that has been because of their management team. . . . [They] have all been very responsive. The minute I have emailed the managers about something, the managers have jumped on things and asked how to make things better. The managers have jumped on training calls right away, and that has done a lot to help build our relationship and trust. The management team has taken us seriously and has wanted our partnership to be successful. That has left a big impression on us." —Manager

Good reporting tools and service coverage; Microsoft acquisition has gone well

"The vendor has good reporting tools. They have enough business so that even on the weekends, the service coverage is the same. Nuance does a very good job. Nuance was just acquired by Microsoft, and things have actually been pretty good." —VP/other executive

Opportunities

One customer reports nickel-and-diming

"Nuance charges [for every little thing]. We are paying for the services that we agreed to, but Nuance has also put some of their agents on our platform to answer phone calls when those agents don't have full access, which prevents them from being able to assist callers. We are paying for unnecessary escalations." —Manager

Product could include a backup for lost patients, programmable canned responses, and improved call-center reports

"The solution might not work for all organizations because its canned responses might not meet the needs of their callers. If Nuance had their own call center, they could program their own canned responses. . . . They need to have some sort of backup solution in place to help patients who are lost. [Another] weakness is the reports aren't great. It is hard to see the level of detail that we need in what the system captures. . . . There is definitely room for improvement with the vendor's real call-center reports." —Director

Customers want the ability to customize the interactive voice response and less limited text messaging

"One of the system's weaknesses is its IVR. That feature is very limited. . . .The IVR feature is almost like a template where I can change things, but I can't create my own questions; I am limited to a predetermined set of questions. I didn't expect that. I thought I would have more control over what questions and answers I built into the system to further assist patients' families. That is a big weakness; having the ability to customize things further would be a game changer. Some of the users are confused by the IVR feature and don't like it or don't find it very helpful. Patients' families have the option to opt out and speak to agents instead of using the IVR. Nuance's options with text messages are limited and aren't always helpful." —Manager

Points to Ponder

What does a customer need to do to be successful with this solution?

Customers explain

- **Communicate your specific organizational needs, do due diligence, and manage expectations with timelines and deliveries:** "Customers should know what they want and what their organization, patients, or clients need. Customers should also go in with a set of goals and metrics and communicate with the vendor about those. It is important to have a good relationship with and clear expectations of the vendor. Customers should do their due diligence to understand what the vendor offers and make sure everything is laid out in the contracts. Additionally, they should be realistic in their timelines and deliveries and have good communication and agreements with the vendor." —Manager

- **Come prepared:** "It takes time to make sure all of the agents are ready to go. . . . Customers should come prepared with their own workflows and documents to make the [Nuance staff] training process easy. Otherwise, that process can be a hurdle." —Manager

- **Do a user-acceptance test:** "Make sure [to] do a user-acceptance test. Many people hate IVRs. IVRs prompt callers to say something in a particular way, and if users say things in a different way, then they will get stuck in loops without being able to talk to real people who could solve their problems. . . . Potential customers need to be very careful and work from a user-experience perspective to test the solution with their potential use cases and make sure that the solution won't cause frustration. If someone is expressing in the call that they are being misunderstood or that they want to talk to a person, we wanted to have an intervention where a real person immediately joins that session." —Director

Nuance explains

- Bring the right stakeholders to the table for vendor evaluation or strategic planning
- Know the organizational patient experience and patient access goals
- Be open to operational change
- Consider multiyear objectives and a strategic partner that collaborates to achieve them

Other relevant commentary

Acquisitions have positively impacted Nuance's long-term market viability; Nuance should be careful of other companies taking advantage of open-source work:

"Nuance has a lot of advantages in the healthcare market now that they are part of Microsoft. There are definitely a lot of investments being poured into Nuance Patient Engagement Solutions, like intelligent automated responses. . . . Nuance is in a pretty good position. However, other start-ups may catch up to them because many of the things Nuance uses are open source. Nuance may be able to use their early advantage and experience to their benefit, but other companies might be able to take advantage of the open-source work that is out there. Many organizations now offer similar solutions to Nuance, and it will be interesting to see who wins that game. We don't know whether the deciding factor is going to be experience or whether it is going to be the brand-new innovative thoughts that have the advantage in the ecosystem now." —Director

Nuance: Company Profile at a Glance

Year founded
1992

Headquarters
Burlington, MA

Number of employees
Nuance: 6,500
Microsoft: 221,000

Estimated revenue
Microsoft FY22 Q4 revenue: $51.9 billion

Funding
Nuance/Microsoft is a public company

Revenue model
SaaS subscription service paid monthly over the life of the contract

Target customer
Provider IDNs, hospitals, ambulatory practices, hospital and health systems (both acute and post–acute care)

Healthcare Executive Interview

Diana Nole,
Executive VP & General Manager

How would you describe your solution?
Nuance Patient Engagement Solutions use NLU-powered conversational AI to intelligently automate personalized patient interactions on voice and digital channels, solving pressing patient service, staffing, and financial challenges. By integrating with organization systems and combining proven engagement technology with healthcare expertise, our single omnichannel solution advances the patient and care team experience and drives better clinical and financial outcomes. No matter how they get in touch, patients interact naturally with industry-leading intelligent virtual agents for 24/7/365 self-service, making it easier for patients to manage their care and advancing organizational commitments to high-quality service.

Why was Nuance started?
Founded over 20 years ago, Nuance amplifies our customers' ability to help others with technology that is designed to empower the excellence of those we serve to deliver superior outcomes. From one of the first voice recognition systems to industry-leading consumer engagement technology to the most advanced ambient clinical intelligence ever introduced, Nuance has played a foundational role in the emergence of conversational AI.

What is Nuance's biggest differentiator?
Using a single omnichannel solution with NLU-powered intelligent virtual agents on voice and digital channels, Nuance is uniquely able to allow organizations to deliver 24/7/365 access to information, assistance, and self-service options through automated conversational interactions—no matter how patients get in touch. Our large data repository and billions of past and future voice and digital engagements continuously refine and evolve our industry-leading NLU technology. By enabling both voice and digital channels, organizations can ensure no social determinants of health or digital inequity issues marginalize patients or impact their ability to access care and services.

Solution Technical Specifications (provided by Nuance)

Cloud environment
Microsoft Azure

Development platform
Azure Services, Azure AKS, Apache Tomcat as VM

Database environment
Microsoft Azure SQL

Security platform
HITRUST, SOC 2, ISO 27001, NIST-FEDRAMP, PCI, CIS 20 controls, CIS Benchmark hardening

Confidentiality
HIPAA, BAA maintained with third parties

Data encryption
TLS 1.2 to protect data at rest and in transit; AES 256-bit encryption protocols to protect data

Integration approach
Direct APIs, SMART on FHIR

HITRUST certification
Yes

AI
Yes

Report Information

Nuance Performance Overview
All standard software performance indicators

Culture

Keeps all promises (percent of respondents who answered yes)	(n=5)	**100%**
Proactive service (1–9 scale)	(n=5)	**A**
Product works as promoted (1–9 scale)	(n=5)	**A**

Loyalty

Forecasted satisfaction (1–9 scale)	(n=5)	**A+**
Likely to recommend (1–9 scale)	(n=5)	**A+**
Overall satisfaction (1–9 scale)	(n=5)	**A**
Part of long-term plans (percent of respondents who answered yes)	(n=5)	**100%**
Would you buy again (percent of respondents who answered yes)	(n=5)	**100%**

Operations

Ease of use (1–9 scale)	(n=5)	**A-**
Quality of implementation (1–9 scale)	(n=5)	**A**
Quality of training (1–9 scale)	(n=5)	**A**

Product

Delivery of new technology (1–9 scale)	(n=5)	**A**
Overall product quality (1–9 scale)	(n=5)	**A**
Product has needed functionality (1–9 scale)	(n=5)	**A**
Supports integration goals (1–9 scale)	(n=5)	**A**

Relationship

Executive involvement (1–9 scale)	(n=5)	**A+**
Quality of phone/web support (1–9 scale)	(n=5)	**A-**

Value

Avoids charging for every little thing (percent of respondents who answered yes)	(n=5)	80%
Drives tangible outcomes (1–9 scale)	(n=5)	**A**
Money's worth (1–9 scale)	(n=5)	**A-**

Software grading scale

A+ = 8.55–9.0	B+ = 7.65–7.91	C+ = 6.75–7.01	D+ = 5.85–6.11	F = <5.22
A = 8.19–8.54	B = 7.29–7.64	C = 6.39–6.74	D = 5.49–5.84	
A- = 7.92–8.18	B- = 7.02–7.28	C- = 6.12–6.38	D- = 5.22–5.48	

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Our Mission
Improving the world's healthcare through collaboration, insights, and transparency.

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Note
Performance scores may change significantly when additional organizations are interviewed, especially when the existing sample size is limited, as in an emerging market with a small number of live clients.