



HEALTHCARE LEARNING & DEVELOPMENT

**Blending AI tools
with expert coaching
supercharges CX
and drives sales**

Upskilling healthcare
advocates helps them shine
in the moments that matter
to build enduring trust



OVERVIEW

A major healthcare payer recognized how vital an updated curriculum and training are to equip its contact center advocates assisting members. Leaders chose to tackle the opportunity on multiple fronts, demonstrating that people are an organization's most valuable asset, and their development is worthy of investment.

The company embraced one learning initiative, documented the wins, and then swiftly shifted gears to focus on another, and another. With each subsequent engagement, confidence grew and the objectives became more ambitious. Experiments and pilots more broadly expansive. Willingness to integrate powerful new tools ratcheted up because one win amplified success of the next.

Today, this major payer relies on TTEC to fortify its training, update curriculum, personalize coaching, and leverage new AI tools, automation, standardization, and streamlining of processes with an eye on the prize: Enhance skills to drive sales.

Together we are:



1

Supercharging ROI with AI training that fast-tracks front line speed to proficiency

Accelerating speed to proficiency was a top priority for our Learning and Development team, fully pumped and aligned to our healthcare client's primary objective: Convert contact center interactions to sales.

The healthcare payer recognized limits of its existing training model, which did not scale, suffered accuracy issues, and the learner experience was lackluster, particularly during the intense seasonal ramp-up for open enrollment.

Success in action:

From RealSkill pilot to full deployment

We started with a pilot test of TTEC's award-winning RealSkill AI training bots, which simulate and role-play member interactions so learners can practice their skills in a safe space. The bots provide real-time feedback along with coaching personalized to the individual learner. The successful pilot started with one line of business, Medicare Sales, before expanding to another, Individual and Family Plan (IFP) Sales.

The project followed a disciplined methodology starting with discovery, to prioritize KPIs, followed by design, development, deployment, and evaluation. The final stage was essential because the feedback collected informed how the RealSkill bots should be refined before full-ramp scalability.

By embracing a cultural and operational shift toward simulation-based learning, the client achieved transformative efficiency and performance gains. The financial impact was impressive with a 465% ROI achieved and \$350,000 saved, representing an 85% reduction in costs compared to manual training methods.

RealSkill results

465%

ROI

97%

Quality

\$350K

savings

83%

cost reduction

16%

improved AHT

90%

technical proficiency

Source: TTEC healthcare client



2

Enhancing expertise and agility with Wizard AI solutions lifts quality, saves time

Our client encountered a persistent challenge: Development of training content was resource-intensive and too slow to keep pace with modern operational demands. Manual processes for intake, scoping, and curriculum design prolonged turnaround times, placing a burden on internal Learning and Development teams and leading to inconsistencies across global deliverables.

With volume surges of open enrollment approaching, the client required a solution to enhance scalability and operational efficiency. The primary objective was to accelerate the content development cycle while upholding rigorous instructional standards necessary to support complex healthcare requirements.

Success in action:

AI and automation do the heavy lifting

Once we identified the chief friction points, we implemented TTEC's proprietary AI-enhanced solutions: the TTEC Curriculum Wizard and the TTEC Discovery Wizard. These advanced tools were engineered to automate the labor-intensive processes of curriculum planning and requirements-gathering, ensuring that learning solutions could dynamically adapt to real-time business shifts.

Success was rooted in building trust and driving user adoption. The tools were initially piloted in a controlled environment to validate their efficacy. Following a successful pilot, a comprehensive change management strategy was executed to deploy the solutions across multiple lines of business.

TTEC facilitated extensive walkthroughs and live demonstrations, illustrating how the Wizards optimized workflows and elevated the overall output of the instructional design teams.

Wizard results

57%

time savings

98%

QA

138

hours saved

80%

reduced cycle time

Source: TTEC healthcare client



3

Integrating AI tools with standardized training transforms contact center

Our client was hampered by manual, siloed processes that prolonged training development timelines for associates. Lack of standardization led to inconsistent messaging across teams and lines of business while inflating operational costs.

New functionality and frequent updates to the CRM system stressed everyone's ability to keep up with changes. Associates needed not only to adopt new practices, but also to unlearn and abandon familiar motions they'd already mastered but that no longer met current needs.

Success in action:

Streamlining accelerates speed to proficiency

TTEC implemented a comprehensive suite of AI platforms to automate time-intensive training development tasks. **Key solutions included:**

- ✔ Intelligent ticket reviews
- ✔ AI-driven analysis to streamline feedback and compliance checks
- ✔ Video- and audio-generation tools to accelerate content creation

Using AI-assisted drafting and editing solutions, our Learning Design team standardized workflows and training recommendations that previously were managed through individual emails, a less efficient practice prone to error and inconsistency.

The transition to an AI-enhanced model delivered significant, measurable performance improvements including a 41% reduction in training development time (from average of 61 hours to 36 hours per training release).

This productivity win accelerated speed-to-proficiency for both new hires and steady-state associates, those tenured employees who consistently performed at or above target.

Workflow results

41%

reduced development time

30%

faster review time

21%

speedier recommendations

70%

tasks supported by AI

Source: TTEC healthcare client



4

Learning curriculum audits reveal new opportunities to uplift skills and drive sales

A stagnant training program created a hidden liability. Leadership knew they should evaluate their learning ecosystems, yet other priorities often got in the way.

Recognizing that a curriculum audit would reveal hidden strengths, critical weaknesses, and new opportunities, the company turned to TTEC's Learning and Development experts to conduct a comprehensive assessment of training.

The end game was clear: Enhance skills, technical proficiency, and customer satisfaction to accelerate sales of healthcare plans across two important lines of business.

Success in action:

Audit opens door to up the ante on sales

TTEC designed and performed a rigorous curriculum audit engaging multiple stakeholders. We conducted a series of structured "reflection sessions" with the payer's sales leadership, operations, and learning and delivery (L&D) teams to identify what was working, what required a fix, and insights that would guide continuous improvement. Cross-functional collaboration was key.

The redesigned curriculum focused on equipping healthcare advocates with the mindset and skills necessary to drive revenue and foster member loyalty. The new training prioritized critical areas such as consultative selling, handling complex customer objections, and proactive retention strategies.

This strategic change management initiative successfully modernized training across two critical lines of business: Individual and family plans (IFP) and Medicare sales.

Audit results

96%

accuracy

90%+

associates rated training highly

19%

rise in CSAT

90%

technical proficiency

Source: TTEC healthcare client



A healthcare partnership built on success — with more wins on the horizon

As our partnership continues to expand, we're identifying new opportunities for impact — including more innovation to enhance key training programs.

Our near-term focus is to reduce friction in complex customer journeys while growing long-term customer value and improving loyalty and retention. The redesigned curriculum equips healthcare advocates with the mindset and skills necessary to drive revenue and foster member loyalty, prioritizing consultative selling, handling complex customer objections, and proactive retention strategies.

We're using advanced analytics and journey-level insights to guide the company as it evolves training and curriculum. Our disciplined methodology follows discovery to prioritize KPIs, followed by design, development, deployment, and evaluation .

All our work is underpinned by the latest AI-powered market innovations, including our own proprietary, award-winning solutions. These capabilities allow the company to better understand member intent, support associates more effectively in complex moments, and continuously optimize performance while protecting member satisfaction.

Our focus remains clear: Enhance skills, technical proficiency, and customer satisfaction to accelerate sales of healthcare plans.



Connect with us to
achieve similar results

About TTEC

For over four decades, TTEC has partnered with iconic and disruptive brands to turn customer interactions into meaningful connections. With a global ecosystem of CX experts, we design, build and deliver AI-powered, digital-first customer experiences that span the entire customer lifecycle. Our unique combination of operational excellence and deep technical expertise sets us apart as we work with clients to maximize moments that build trust, inspire lasting loyalty and deliver valuable business outcomes.

Together with our team of architects and builders at TTEC Digital, we integrate data, analytics and AI within the world's leading CX technology platforms to help clients optimize what they already have, integrate what they need next, and achieve powerful business outcomes. Learn more at ttec.com and ttecdigital.com.



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