



FORTELLAR

Fortellar is a full-service healthcare technology consultancy with deep expertise in data, artificial intelligence (AI) and cybersecurity.

AI IN HEALTHCARE

**7 TIPS TO OPTIMIZE YOUR AI STRATEGY AND
ALIGN TO YOUR PRIORITY BUSINESS GOALS**

2025



thank you

If you'd like to learn more about these data + AI strategies, please do not hesitate to contact us. We'd love to hear from you!



Our Company

ABOUT FORTELLAR

Fortellar specializes in healthcare digital transformation. We bring to bear in-depth domain expertise across data + AI, intelligent automation, infrastructure, cloud/visualization, applications + platforms, security + compliance and service delivery in the healthcare and healthcare insurance markets.

Core capabilities

Data + AI

Infrastructure

Cloud + Virtualization

Applications + Platforms

Security + Compliance

Service Delivery

ACHIEVING

SUCCESS THROUGH

PEOPLE.



FORTELLAR

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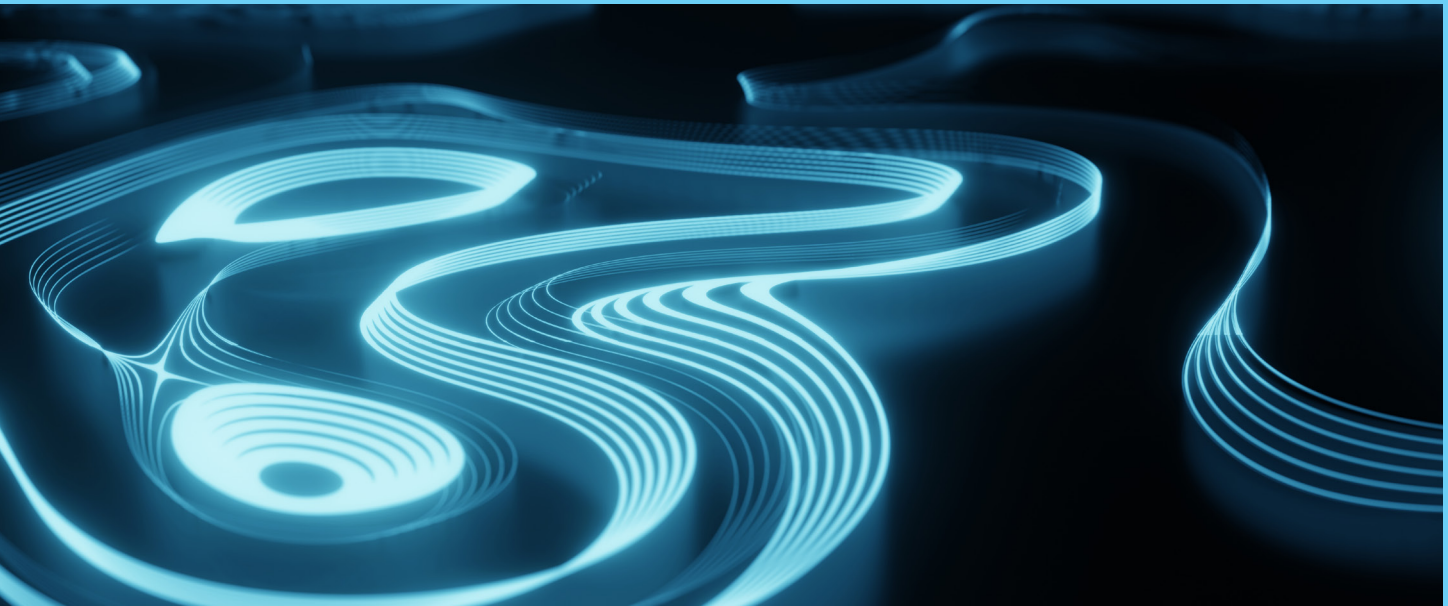
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By using artificial intelligence (AI) to impact capability, source innovation and redefine traditional work, you may increase operating income by 10-15% in 18 months. Read more to learn how.

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Introduction: a perspective in healthcare AI



“ US health insurers can unlock up to \$7 billion in total value in 18 months, using solutions driven by artificial intelligence (AI). ”



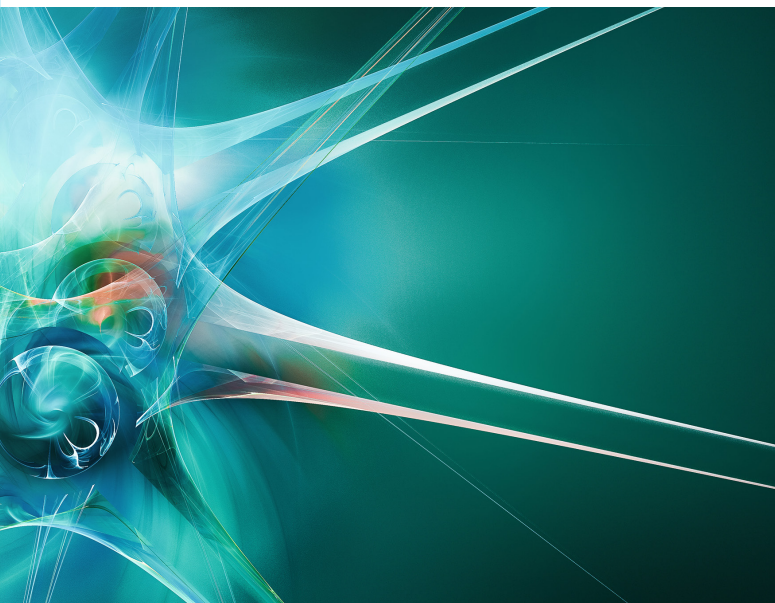
AI IN PRACTICE

In a recent engagement, Fortellar unlocked \$8MM in client savings annually by innovating an AI-based call center chat bot. This bot optimized call routing and reduced call times by 25%.

US health insurers can unlock up to \$7 billion in total value in 18 months, using solutions driven by artificial intelligence (AI). This value could be generated primarily from six different capability areas that align to an insurer's operating model. For an individual health plan, it equates to unlocking \$1.5 million in operating income for every 100 full-time employees (FTEs), by the end of the next calendar year, as a result of automating core administrative functions using AI.

Source: Accenture

AI in healthcare



56% of healthcare and life sciences organizations are expanding AI adoption. Do you have the tools and strategies to help your organization modernize?

The healthcare industry is rapidly evolving in terms of how artificial intelligence (AI) or generative artificial intelligence (Gen AI) is being applied. From much of the recent research, firms are looking to capitalize on AI efforts with respect to 1. customer service, 2. improving benefits loading and 3. reducing cost and optimizing operational efficiency. In the back drop, the healthcare industry at large is already using AI in sophisticated ways whether it be in drug discovery, improved patient care (think wearables and IoT devices), or population health management.



INTERSECTION OF STRATEGY & AI

In the realm of AI-driven healthcare, the journey to success begins at the crossroads of strategic foresight and innovative technology. Have you engaged directly with the lines of business in your healthcare organization to uncover their business priorities? How can AI help to shape and improve those business priorities to provide value creation? Quantify this value prior to piloting.



CUSTOMER SERVICE

By leveraging the power of AI, you can improve personalization, customer experience, call center optimization and more.



BENEFITS LOADING

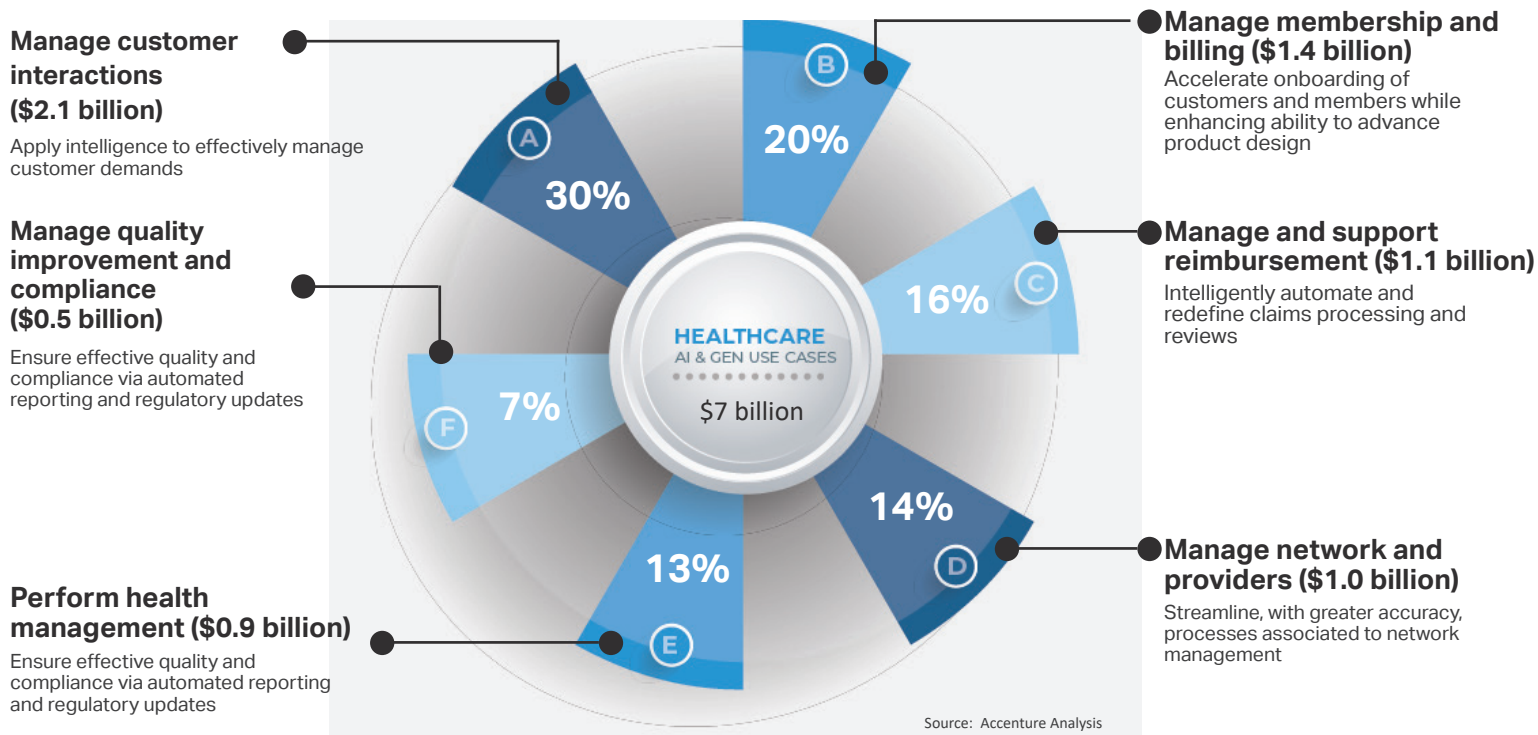
AI can automate repetitive tasks, improving efficiency and productivity. AI algorithms can analyze large data quickly and provide valuable insights.



OPERATIONAL EFFICIENCY & COST REDUCTION

Create efficiency with complex claims processing and fraud detection in insurance claims. Leverage AI for cost reduction or revenue generation.

US healthcare payers can unlock up to \$7 billion in operating income across six capabilities



ARTIFICIAL INTELLIGENCE USE CASES IN HEALTHCARE ARE BOUNTIFUL

According to the Accenture research above, AI has tremendous potential in the healthcare and healthcare payer settings. Fortellar's recent experience suggests that many organizations also require a holistic "rethink" of how they are going to prioritize, manage and evolve AI efforts and directly align them with financial outcomes. Below are a few primers:



1. Organizational Design & Cross-functional Governance

Organizational design should emphasize a cross functional AI Governance structure that involves cross-departmental collaboration, ensuring AI initiatives align with broader organizational goals and ethical standards.



2. Data & AI Strategy

Do you have data and AI strategy? What about one that clearly outlines your business priorities and the linkage between your objectives and AI technology?



3. Agile Implementation Method

Once you have a clear sense for how you are going to add value (and measure the value creation), do you have a team in place that can execute against these priorities in an agile fashion?



4. Data + AI Maturity Assessment

If you're looking to enhance your data and AI capabilities, Fortellar's Data & AI Maturity Assessment is an essential step. This comprehensive evaluation not only assesses your current environment but also sets the stage for future success. We'll provide tailored recommendations to advance your current state to a more mature level and help your team devise a strategic plan. This plan is designed to accelerate the time-to-value of AI solutions, ensuring your organization can fully harness the power and potential of AI technology.



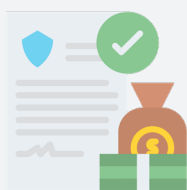
4. Post-deployment Support

Fortellar can also bring to bear a set of talented AI resources and practitioners that can managed your AI solutions post-deployed through our managed services.

Use case:

Efficiently managing retro claims backlog

Post-service medical necessity reviews are proving to be inefficient and burdensome. These reviews, essential for claims adjudication, are fraught with complications—they're laborious, time-intensive, and lead to procedural bottlenecks. This not only strains the user experience but also risks non-compliance with regulatory standards and undermines performance guarantees. A significant concern is that such inefficiencies are diverting clinicians from their primary roles, as they find themselves mired in administrative tasks that do not utilize their clinical expertise.



Over **9,000** retro claims in queue with **70%** being in queue for over **30** days

Tech Spotlight

- 1 Amazon Web Services
- 2 AWS Glue & Lambda
- 3 AWS SageMaker
- 4 AWS Redshift
- 5 UiPath (RPA)

Problem

Medical necessity review requirements result in significant queue backlog

Post-service medical necessity reviews are proving to be inefficient and burdensome. These reviews, essential for claims adjudication, are fraught with complications—they're laborious, time-intensive, and lead to procedural bottlenecks. This not only strains the user experience but also risks non-compliance with regulatory standards and undermines performance guarantees. A significant concern is that such inefficiencies are diverting clinicians from their primary roles, as they find themselves mired in administrative tasks that do not utilize their clinical expertise

- ▶ Over 9,000 retro claims in queue with 70% being in queue for greater than 30 days.
- ▶ Daily incoming volume exceeds daily output which causes queue to constantly grow.

Objective

Improve turnaround time by leveraging AI modeling and RPA

Use AI modeling and RPA solutions to increase efficiency through prioritizing retro claims and future claims for approval automation based on thresholds configurable by the business. Internal clinicians will continue to be responsible for final decisioning.

- ▶ AI Decision Recommendation Model
- ▶ RPA Case Closure and RPA Case Data Validation Automation

Approach

Backlog cleared and new cases processed in a timely manner

Through implementation of AI model and RPA solutions, the backlog queue will be clear and new cases will be reviewed closer to the day of receipt. This approach allows for internal clinicians to perform at top of licensure.

- ▶ Simulation Tool built on AI Model which gives business flexibility to manage volume.
- ▶ ~\$3M in cost savings annually and \$1M in cost avoidance (clearing queue) by implementing AI model and RPA solutions.



Use case: Enhanced member communications

The client's member touchpoint audit system contains outdated, poorly worded and incomplete information with unclear call to actions. Communications are written in a variety of styles depending on author, vendor, etc. without being brand compliant.



Over **700** artifacts identified for re-writing

Tech Spotlight

- 1 Microsoft Azure
- 2 OpenAI Private ChatGPT Services
- 3 Azure Front Door
- 4 ChatBot UI
- 5 Azure Container Apps

Problem

Outdated, brand-incompliant messaging

The client's member touchpoint audit system contains outdated, poorly worded and incomplete information with unclear call to actions. Communications are written in a variety of styles depending on author, vendor, etc. without being brand compliant.

- ▶ 700-800 artifacts identified for re-writing.
- ▶ 750 hours spent to rewrite manually without consistency guarantees.

Objective

Increased ease and decreased calls to customer service

Improving member engagement communication will help with advocacy and affordability.

- ▶ Improve customer satisfaction, NPS scores, engagement, and reduced calls.
- ▶ Saves CX team 60% effort or 450 hours of work by only having to review final drafts.

Approach

Generate a personalized, consistent messaging with clear call to action

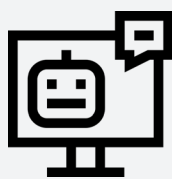
One platform to evaluate, review, rewrite and improve messaging from all lines of business.

- ▶ Brand-voice compliant at 7th grade reading level.
- ▶ Use of simple language, friendly compassionate tone with clear call to action.

Use case:

AI chatbot for optimized call center onboarding

Our client's call center associates are tasked with answering member calls spanning 10 lines of businesses for 2.7M members served by 900 different networks via 6000 health plans. Training process is costly with training materials spread across a variety of disparate sources.



1.2 million
member calls
received with
an average
duration of
12 minutes

Tech Spotlight

- 1 Microsoft Azure
- 2 OpenAI ChatGPT-4 Services
- 3 Azure Form Recognizer
- 4 Azure Cognitive Search
- 5 CosmosDB

Problem

Complex domain to master; costly training process; high churn rate

Our client's call center associates are tasked with answering member calls spanning 10 lines of businesses for 2.7M members served by 900 different networks via 6000 health plans. Training process is costly with training materials spread across a variety of disparate sources.

- ▶ 1.2M member calls with average duration of 12 minutes and total cost to serve of \$41.2M.
- ▶ Training time is approximately 12 weeks. Cost to train 1 FTE is \$1700+/week with 40% churn rate.

Objective

Increase member and associate satisfaction

Use of a generative AI-powered chatbot which helps with answering questions in real-time, fast onboarding, locating the necessary documentation to answer calls.

- ▶ Reducing call volume and improved member satisfaction. A 3 minute reduction equates to approximately \$8.5M in savings. A 3% reduction is approximately \$1.5M in savings.
- ▶ Reduce training time and improve associate satisfaction (and in turn, reduce churn).

Approach

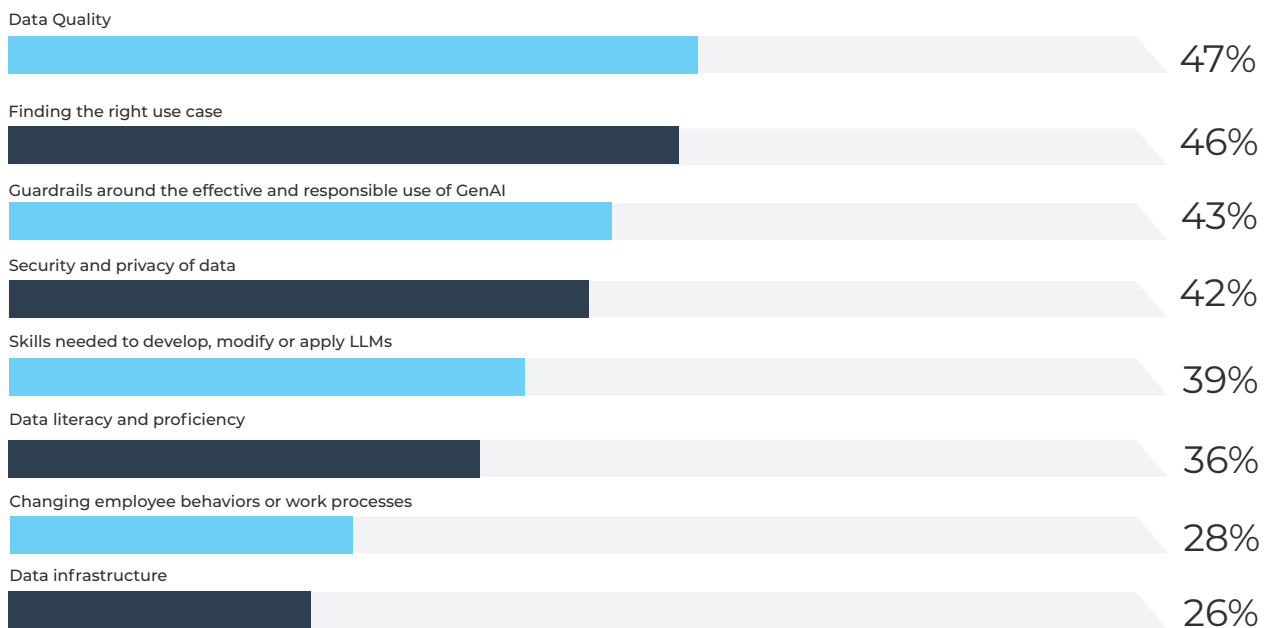
Using AI chatbot trained on proprietary data to train and answer member calls

A product that answers questions about our plans/benefits with high accuracy and provides citation with each answer. The product is vetted by business partners and SMEs before getting live.

- ▶ Reducing training time and call center churn.
- ▶ Assist in answering member calls with high accuracy and reduced time.

Challenges with generative AI

From the Amazon Web Services (AWS) CDO Agenda 2024, one of the largest CDO studies in the market, data quality was identified as the main challenge when realizing the full potential of generative AI. Succeeding with generative AI at an enterprise level is challenging, however, when asked what they find the greatest challenges to realizing the full potential of the technology, nearly half (46 percent) of CDOs pointed to data quality and finding the right use cases. Establishing guardrails for responsible use (43 percent) and security and privacy of data (42 percent) were slightly lower concerns.



IN A SIMILAR STUDY RUN BY GARTNER



In a recent Gartner study (Gartner AI in Organizations Survey, participants were asked: What are the top 3 reasons why privacy, security and/or risk are barriers to the implementation of AI techniques within your organization?

50%

Security & Compliance

44%

Data

43%

Performance & Cost

7 tips to optimize your AI and align priority business goals

Fortellar has been involved in numerous AI discussions and projects. We have distilled 7 discrete tips that will guide you to success with AI. What's more? These tips will help to create connective tissue between your business priorities and the challenges that AI will help to solve.

"Artificial intelligence would be the ultimate version of Google. The ultimate search engine that would understand everything on the web. It would understand exactly what you wanted, and it would give you the right thing. We're nowhere near doing that now. However, we can get incrementally closer to that, and that is basically what we work on."

-Larry Page

1

DEVELOP AN AI STRATEGY

DRIVE HEATMAPMING AND PRIORITIZATION OF USE CASES

Get intimately involved with your line of business owners. Understand their needs and priorities. Use a 2x2 matrix to plot out an initial strategy by feasibility and impact. Develop initial requirements, impact statements and risk of inaction statements for each use case. Use these prioritized use cases to drive future AI development

ARTIFACTS:

- ☒ 2x2 Use case matrix
- ☒ Use case requirements
- ☒ Initial roadmap plan

2

START SMALL

USE PILOT PROJECTS TO SHOW BUSINESS VALUE AND GAIN MOMENTUM

By starting with a priority business case, you can assure that leaders will take note and understand the value creation of your AI project. Distill your requirements into an agile format for sprint-based delivery. Show progress iteratively and don't be afraid to adjust based upon feedback. Keep stakeholders closely involved.

ARTIFACTS:

- ☒ Priority business use case
- ☒ Develop agile methods
- ☒ Engage stakeholders

3

MATURE AGILE METHODS

IMPROVE ITERATIVE DEVELOPMENT PRACTICES AND LEARNING

Ensure that your team is skilled up on the latest agile methods. Consider realigning your team to support agile delivery. Evolve and promote continuous learning on the topic (amongst others). Align your software and tools to support agile delivery and appropriate traceability to the users requirements. Show value creation!

ARTIFACTS:

- ☒ Curate agile training
- ☒ Practitioner alignment
- ☒ Alignment of operational tools

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"If people trust artificial intelligence (AI) to drive a car, people will most likely trust AI to do your job."

-Dave Watters

4

EVOLVE DATA PLATFORM

STAND UP OR MATURE YOUR DATA PLATFORM TO ACCELERATE AI EFFORTS

Data is at the heart of everything AI. Invest prudently into data platform technology and cull transactional data sources into fit-for-purpose data sets and are sanitized and transformed adequately.

ARTIFACTS:

- ✓ Data platform maturation
- ✓ Cybersecurity
- ✓ IAM

5

REFINE DATA VAULT

MOVE SANITIZED AND TRANSFORMED DATA INTO A VAULT FOR PRACTICAL APPLICATION

As data is sanitized, cleansed, augmented and transformed - load it into a secure data vault layer which also maintains regulatory / compliance needs. These curated data sets may be used to test, train and tune your AI models.

ARTIFACTS:

- ✓ Cleansed data
- ✓ Curated data sets
- ✓ AI models

6

TUNE AND AUTOMATE

SPLIT DATA, TUNE YOUR MODELS AND LOOK FOR INTELLIGENT AUTOMATION POSSIBILITIES

As you tune your AI models and optimize them, look for additional opportunities to intelligently automate your work. RPA tools can also support this process and create efficiency. You may also consider tools that aid in algorithm / model selection.

ARTIFACTS:

- ✓ Algorithm selection
- ✓ AI model tuning
- ✓ Intelligent automation

7 tips to optimize your AI and align priority business goals

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"Some people call this artificial intelligence, but the reality is this technology will enhance us. So instead of artificial intelligence, I think we'll augment our intelligence."

-Ginni Rometty

7

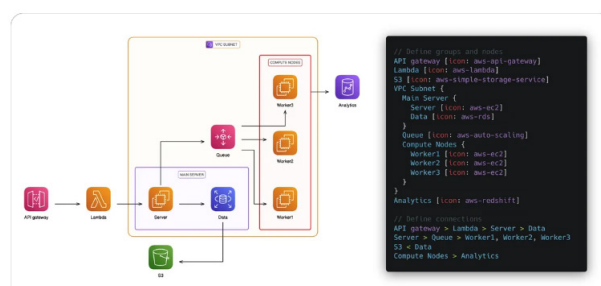
LEVERAGE EXISTING AI CAPABILITIES TO MATURE

CONSIDER UTILIZING EXISTING AI TOOLS TO ACCELERATE TIME-TO-VALUE

Although you are standing up AI capability, many tools that are in market already will help to accelerate your efforts. Consider GitHub's Copilot as an example. Code development and testing can be accelerated vastly by leveraging native Copilot functionality. In a similar way, tools such as excalidraw.com can support automated architecture diagrams and timelines. Or, utilize OpenAI's ChatGPT-4 service to create yaml scripts from an architecture diagram (e.g. You are an AWS developer. Provide a yaml script for CloudFormation based on this architecture diagram). A script and explanation will be generated.

ARTIFACTS:

- ☒ GitHub CoPilot
- ☒ Excalidraw.com
- ☒ OpenAI's ChatGPT-4 architecture to code



Future trends & predictions

In the rapidly evolving landscape of business, the convergence of artificial intelligence (AI) and robotic process automation (RPA) is ushering in a transformative era. As organizations increasingly embrace these cutting-edge technologies, the future promises a dynamic synergy between human ingenuity and machine capabilities. This article explores the profound impact of AI and RPA on the business landscape, delving into their evolving roles, potential applications, and the unprecedented efficiencies they bring to diverse industries. From streamlining operations to fostering innovation, the symbiotic relationship between humans and machines is poised to redefine the very fabric of business processes, paving the way for a future where intelligent automation propels organizations toward unprecedented levels of productivity and competitiveness.



INCREASED INTEGRATION OF AI IN DECISION-MAKING PROCESSES

- In 2024, businesses are expected to witness a surge in the integration of artificial intelligence into decision-making processes across various sectors.
- AI algorithms will become more sophisticated, capable of processing and analyzing vast amounts of data to provide real-time insights.
- As AI systems continue to evolve, they will play a crucial role in enhancing the agility and adaptability of businesses in an ever-changing global landscape.



WIDESPREAD ADOPTION OF AI FOR CUSTOMER EXPERIENCE ENHANCEMENT

- The year 2024 is likely to see a widespread adoption of AI technologies to enhance customer experience across industries.
- Businesses will increasingly leverage AI-powered chatbots, virtual assistants, and natural language processing to provide personalized and efficient customer interactions.
- As AI algorithms become more adept at understanding customer preferences and behaviors, businesses will be able to offer tailored products and services, ultimately improving customer satisfaction and loyalty.



RAPID EVOLUTION OF AI ETHICS AND GOVERNANCE FRAMEWORKS

- With the growing prominence of AI in business operations, there will be an increased focus on establishing robust ethical and governance frameworks surrounding AI technologies.
- Organizations and governments are expected to place a heightened emphasis on responsible AI practices, addressing concerns related to bias, transparency, and accountability.
- Ethical considerations in AI development and deployment will become a critical aspect of corporate strategies, and businesses will actively engage in shaping industry standards and regulations.

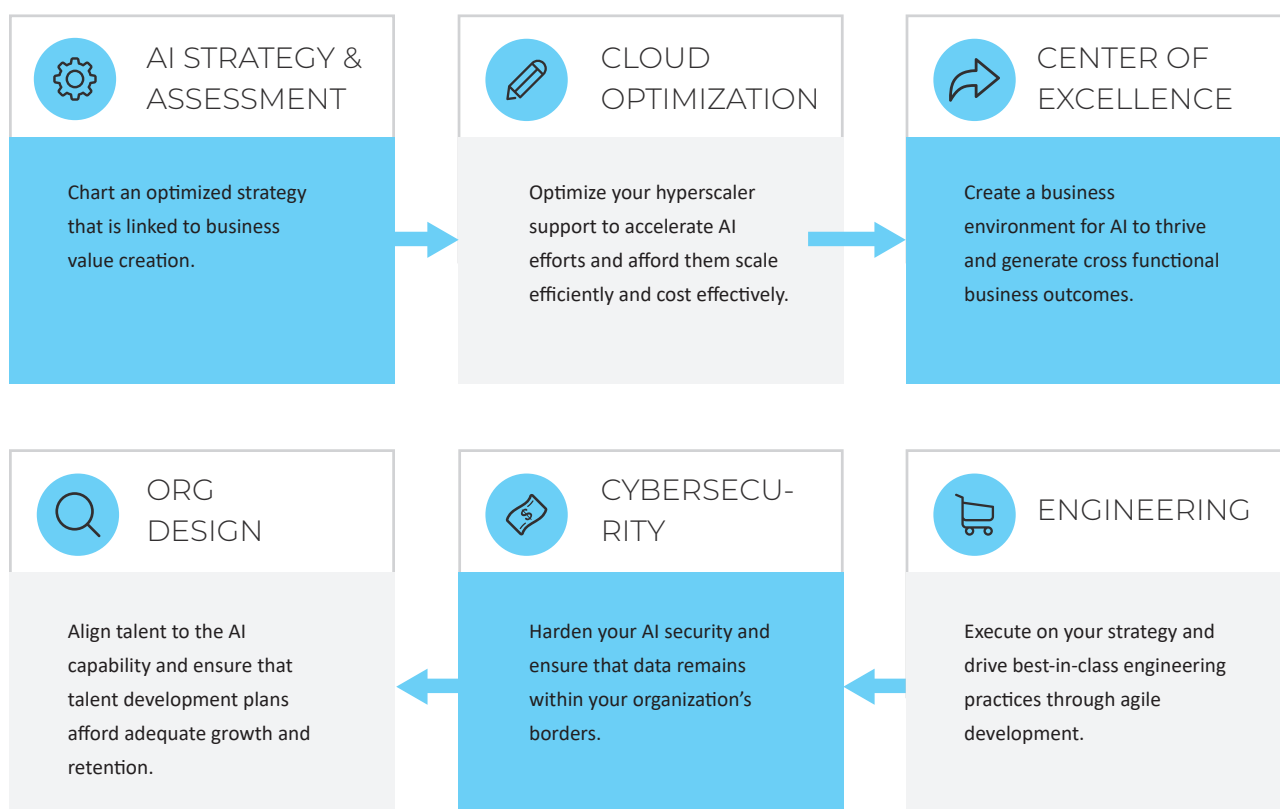
Data + AI Services

Fortellar offers a variety of value-added consulting services which accelerate your time-to-market

Client testimonial

Fortellar's thoughtful approach and relentless execution drove significant impacts to our business. The business outcomes which were delivered positioned us well in a highly competitive market. Fortellar drove strategy and execution which helped us to position the company for sale to Brown & Brown. I relied, and continue to rely, on them as trusted partners.

Carey Smith
SVP & CIO, Orchid Insurance



THANK YOU

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