OUTSOURCE CONSULTANTS

CASE STUDY

HEALTHCARE

ENTERPRISE HEALTH + WELLNESS TECHNOLOGY

# Zero to self-funded AI in 90 days. $250K unlocked. $0 new budget.

A leading health-and-wellness technology brand wanted to modernize CX while their competitors stalled on AI indecision and budget bottlenecks, Outsource Consultants (OC) was tapped to help this healthtech brand capitalize on an early mover advantage but had no added budget to work with.

**No problem.**

OC helped the brand right-size their support staffing and tighten QA-linked workflows through the right partner, which freed $250K in unlocked budget inside the first 90 days.

Those savings were immediately redirected to fund a phased AI rollout: chat, agent assist, and self-service, with OC's Vendor Management Office (VMO) benchmarking performance throughout the rollout to guarantee success. No new tech budget. No added headcount. Performance goals hit before the first quarter closed and a self-funded AI rollout achieved with zero budgetary risk.

| $250K | $0 | 98% |
|---|---|---|
| unlocked in roughly 90 days, funding the AI rollout | in new technology budget or added headcount | customer satisfaction through the transition |

| VERTICAL | SERVICES | FOOTPRINT | GOVERNANCE |
|---|---|---|---|
| **Health + wellness technology** | **Omnichannel support + phased AI rollout** | **US-based partner, right-sized hybrid model** | **VMO: monthly KPI cadence** |

## THE STORY IN 20 SECONDS

### THE STALL

CX modernization blocked the way: no new budget, AI indecision, technology stagnation, and a support operation sized by habit instead of demand.

### THE MODEL

OC helped optimize the labor line first through the right partner, then let the freed budget fund a phased AI rollout. No board battle required.

### THE RETURN

$250K unlocked in 90 days, FCR and handle-time goals hit inside a quarter, 98% CSAT, and an AI roadmap that paid for itself.

## THE CHALLENGE

# Every healthcare brand wants AI modernization. The winners are the ones that can unlock the budget.

The pattern is the same at nearly every enterprise right now. Leadership wants AI in the customer experience. The technology exists. And the initiative dies in the same place every quarter: there is no new budget line for it, the business case competes with a dozen other transformations, and the safest decision is to wait. Call it pilot purgatory.

This brand refused the wait, but it also refused the usual price of moving. Instead of fighting over net-new tech budget and added headcount, the typical approach became the pitch to leadership. “What if we could modernize our patient experience, fund it within our existing operation as it stands, and prove ROI fast enough that every stakeholder is satisfied by the end of the quarter?”

That brief cannot be met by buying software first. It can only be met by finding the money first. OC set to work.

> **AI transformation does not usually fail on technology. It fails on sequencing: automating before the budget exists, instead of unlocking the budget that funds the automation.**

# Optimize patient experience first. Automate technology second.

The brand engaged OCs to run the sequence in the right order. Step one was the labor line: OC screened its network of 300+ vetted BPO partners, each tracked on 100+ performance data points including AI readiness, and matched the brand to a right-sized partner.

Support staffing was sized to actual demand, and QA-linked workflows tightened performance from day one. The brand made the final selection from a competitive shortlist of top vendors. OC does not choose the provider; the client does.

Step two was finding the best AI investment for the budget that step one unlocked. The $250K freed inside the first 90 days became the transformation budget: a phased AI rollout across chat, agent assist, and self-service, layered onto a stable, measured operation rather than bolted over a broken one. Phased, because proof beats promises: each component earns the next, with chat support first, then agent assist, and finally self-service, completing a full overhaul of stabilized patient support.

And OC's Vendor Management Office (VMO), an always-on team of CX experts, stayed engaged and managed vendor performance and AI rollout, benchmarking first-contact resolution, handle time, abandonment, and satisfaction every month, so AI modernization never came at the customer's expense.

**Most outsourcing does not fail in the selection. It fails in the first 180 days after go-live.**

So OC's VMO stayed in: benchmarking resolution, handle time, abandonment, and satisfaction every month from day one, through the AI rollout and beyond.

## ABOUT THE ADVISOR

### The AI budget was already in the P&L

OC did not ask for new money. Right-sizing the labor line freed $250K inside 90 days, and that money had a destination before it existed: the AI rollout. No new line item, no board battle, and the advisory itself costs the client nothing.

### Each component earns the next

Big-bang AI is how transformations die. OC phased it: chat first, then agent assist, then self-service, each one proving itself before the next shipped. Nothing scaled until it worked in production.

### The right mix keeps moving. So does OC.

OC's (VMO) benchmarks the operation monthly and manages the labor-and-AI mix as demand shifts. When overnight chat ran light, the model re-sized to a hybrid pool and abandonment cleared its ceiling. The right mix today will not be right in 18 months; the VMO is how it stays right.

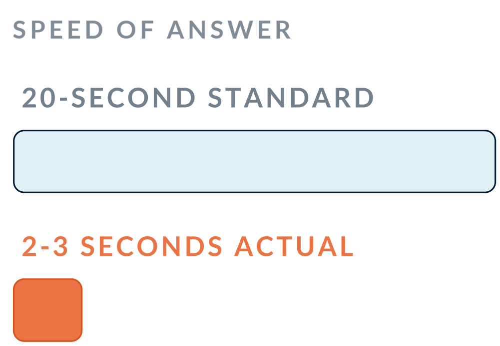
## INSIDE THE ENGAGEMENT

# The health + wellness operation that keeps right-sizing itself

The launch numbers made the case. But ongoing oversight, optimization, and accountability from OC's VMO team meant the BPO partnership kept improving cycle over cycle, with regular re-optimizations that kept the exact headcount necessary at every stage.

### Healthcare performance with room to spare

Consistently the OC-selected vendor beats the goals the brand set for it, and not narrowly. Service level runs at 99 to 100% against an 85% goal. Average speed of answer sits at 2 to 3 seconds against a 20-second standard. Talk time and handle time run at roughly half their ceilings. When a support line answers in two seconds and resolves inside half its allotted time, the AI layered on top is an accelerant, not a rescue.



Average speed of answer sits at 2 to 3 seconds against a 20-second standard.

### The right-size test, passed twice

As the program matured, real volume patterns emerged: overnight and weekend chat demand ran light. The conventional vendor move is to keep billing for the idle coverage. This partnership did the opposite. Dedicated agents now cover the weekday core where the volume lives, and a usage-based shared pool absorbs overnight and weekend traffic, so the brand pays for capacity it actually uses. The one metric that had run over its ceiling during the transition, abandonment, improved cycle over cycle as the model landed and now clears its 5% goal with room. Right-sizing was not a one-time launch event here. It is the operating model every brand recieves with OC and their dedicated VMO experts.

THE RESULTS

## The AI roadmap paid for itself

Inside the first 90 days, the restructured operation freed $250K, and that money had a destination before it existed: the phased AI rollout. First-contact resolution and handle-time goals were hit in under three months. Abandonment on first contact held under 1%. Customer satisfaction posted at 98% through a transition that usually breaks it. The brand got the modernization every competitor is stalling on, at a net cost of zero new budget, because the sequence was right: the operation funded the transformation instead of waiting for a budget cycle to bless it.

### The model is built to travel

A phased, self-funded playbook proven on one support line is not a one-time win. It is a repeatable model: optimize the labor line, fund the technology, hold performance to a monthly scoreboard, and scale what works.

THE PHASED ROLLOUT

1 · CHAT

2 · AGENT ASSIST

3 · SELF-SERVICE

Chat support first, then agent assist, and finally self-service: each component earns the next.

BY THE NUMBERS

| 90 days | $250K | <1% | 98% |
|---|---|---|---|
| from engagement to a self-funded AI budget | unlocked with zero new spend | first-contact abandonment | customer satisfaction maintained |

# Four ways to read this outcome

Different leaders read this story against different numbers. All four readings are correct. OC has the expertise in health + wellness to deliver for all stakeholders.

IF YOU OWN THE MARGIN

### Funding the AI program in 90 days with no new budget

Few leaders get the pleasure of modernizing patient experience without adding a budget line. But that's what happened, as OC helped free $250K inside 90 days, and the structure of that process (re-sizing labor costs that flex with demand) meant the brand paid for real capacity matched to the real volume it needed. No new budget line was created to fund the AI. The one that already existed started working harder.

IF YOU OWN TRANSFORMATION

### The sequencing problem, solved

The reason AI initiatives stall is not the technology; it is that automation gets proposed before the budget exists. Run the sequence in reverse: optimize the labor line first, and the savings fund the rollout with no board battle. Phased deployment means each component proves itself before the next one ships.

IF YOU OWN THE EXPERIENCE

### Healthcare modernization the patient feels in satisfaction, not in pain.

Transitions are where CX usually breaks. This one posted 98% satisfaction, sub-1% first-contact abandonment, and answer speeds measured in single-digit seconds. Improved performance with lower costs opened the door for a new AI layer to emerge, with chat, self-service, and agent assist absorbing much of the routine work to unlock human agents for the conversations that need them most.

IF YOU OWN TECHNOLOGY + RISK

### Phased, measured, and vetted first

AI readiness is a first-order screening criterion for every partner in OC's network, reviewed for BAA process, SOC 2 reporting, incident-response protocol. And OC's approach of phased rollout on a monthly scoreboard is the opposite of rip-and-replace risk: nothing scales until it has proven itself in production.

— THE TAKEAWAY

# Three things to take from this story

**01** **Your AI budget is hiding in your labor line.** Optimize first, automate second. Run the sequence backward and you get pilot purgatory; run it forward and the transformation funds itself.

**02** **Phased beats big-bang.** Ninety days to proof, then each AI component earns the next. Momentum survives when evidence leads.

**03** **Right-sizing is a discipline, not a launch event.** The strongest signal in this record is a partnership that re-engineered its own footprint around real demand, with OC's VMO proving performance held month over month.

## Your contact center is either funding your AI roadmap or blocking it. There is no neutral.

A 30-minute conversation with our healthcare CX advisors will tell you which one you have, and how much transformation budget is sitting in your labor line. No cost, no obligation, no pitch deck.

**Let's Talk** outsource-consultants.com 888.766.4482

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