

AI symposium

Case studies from across the industry

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Your speakers



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What you'll learn today

- 01 How different types of healthcare organizations are approaching AI governance and their early lessons from these processes
- 02 Why aligning AI investments to strategic goals is necessary and how to prioritize among investment options
- 03 How to apply a "problems first" approach to AI investment and what it looks like using case studies
- 04 How to build and implement AI solutions with the end user in mind to ensure buy-in and minimal workflow disruption



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Agenda

- Identifying the transferrable lessons from AI case studies
- 3 lessons from 3 AI case studies
- Putting it all together



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Identifying the transferrable lessons from AI case studies

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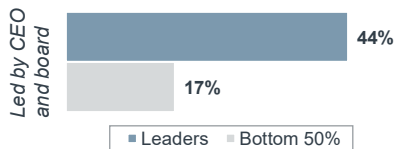
Internal attributes make the difference

4 differentiators identified by Harvard Business Review's survey of leading AI organizations



Executive involvement

Q: What level in your organization leads your company's digitization efforts?



Identification of high-impact, low-risk use cases

"The [AI leaders] are better at identifying and implementing use cases that deliver positive outcomes with lower risk."



Centralized, cross-functional organizing structure

"One common approach [among successful companies] was a cross-silo internal organization...that ensures that AI projects get implemented efficiently and deliver value, while also addressing issues such as cybersecurity, data error, and compliance."



Prior success with AI investments

"As [AI leaders] build differentiated capabilities, these have a compounding effect over time, widening the performance advantage."

Source: Lawler B, D'Silva V, Arora V. *What Companies Succeeding with AI Do Differently*. Harvard Business Review, January 9, 2025.

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Copying others' investments is not the right answer

3 keys to identifying the best use cases for your organization

Let existing strategy guide AI investments



Instead of adopting a new AI strategy, consider how AI will help your organization meet its existing strategic goals.

Consider previously unsolvable challenges



Beyond your existing strategy, consider any key challenges that may have seemed unsolvable. Can AI make potential solutions more attainable?

Prioritize high-impact, low-risk use cases



Start with solutions that limit your organizational risk and use those solutions to test your governance and decision-making processes.



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Replicate what led to others' successes

2 key areas of focus across today's case studies

Processes for adopting and implementing AI



Strategies for identifying high-impact use cases

What do we mean when we say governance?

AI governance: The standards, frameworks, policies, and procedures that guide how AI investment and rollout is directed, controlled, and held accountable. This process includes the establishment of rules and practices that ensure transparency, fairness, improvement, and accountability.



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3 lessons from 3 AI case studies

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Building a sustainable, successful AI investment process

Baptist Health System KY and IN

Create governance structures that maximize existing organizational resources

SCAN Health Plan

Prioritize high-impact, low-risk solutions

OptumCare¹ Florida

Ensure successful adoption by tuning models and adjusting to end user needs

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Baptist Health System KY and IN

Create governance structures that maximize existing organizational resources

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About Baptist Health System KY and IN

ORGANIZATION OVERVIEW

Baptist Health

- **The organization:** The Baptist Health System consists of nine hospitals, employed and independent physicians, and more than 400 points of care. The system employs more than 23,000 people in Kentucky and surrounding states.
- **Background:** Baptist has spent the past few years taking a strategic approach to AI investment across their system due to limited resources. They have placed a heavy emphasis on governance and evaluation while also participating in AI pilots.

Key teaching points

Processes for adopting and implementing AI



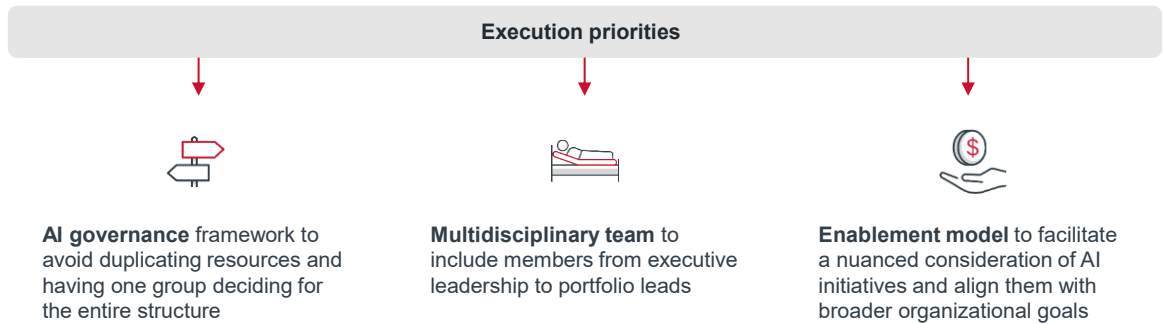
Strategies for identifying high-impact use cases

- Create a non-duplicative yet comprehensive governance structure
- Leverage internal expertise and training key leaders on AI
- Adapt governance on the fly

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Establishing non-duplicative AI governance

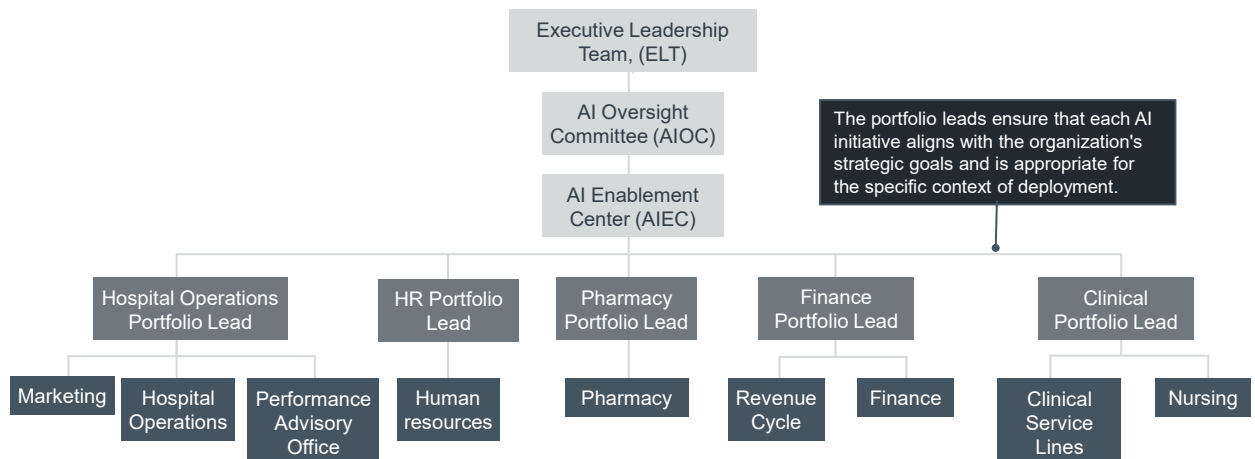
The strategy: Create an AI oversight committee to lead a 12-week intensive project to choose a governance model and launch a pilot of that governance structure



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Build structures that utilize existing leaders' expertise

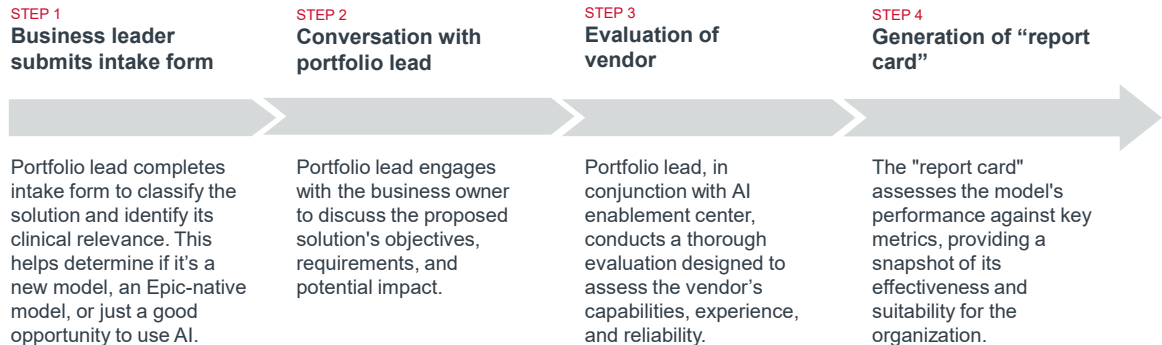
Portfolio leads serve key connector role in Baptist Health's multidisciplinary team structure



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AI enablement model: Building institutional knowledge

Baptist Health's AI evaluation process



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Adjust governance based on early pilot experiences

Lessons learned from AI pilots at Baptist that started before current governance model was established

AI for in-basket messaging

LESSONS LEARNED

Establish clear goals and metrics (early)

- Learned importance of defining usage goals and KPIs before implementation

Set firm evaluation timelines

- Saw value of a stricter timeline for assessing new components, such as generative AI

Plan for contingencies

- Understood importance of scenario planning for potential suboptimal performance

ACTION TAKEN: Sifted the tool's application to the MA nurse space, enhancing utility and communication.



AI to increase imaging throughput in ER

LESSONS LEARNED

Demand vendor transparency

- Needed clarity from the vendor on the tool's mechanisms and accuracy rates

Understand the business case

- Saw the importance of comprehending the business justification for AI implementation

Budgetary considerations

- Learned that the optimal solution may not always align with budget constraints

ACTION TAKEN: Trained ER doctors to leverage AI for faster patient disposition, reducing wait times and costs.

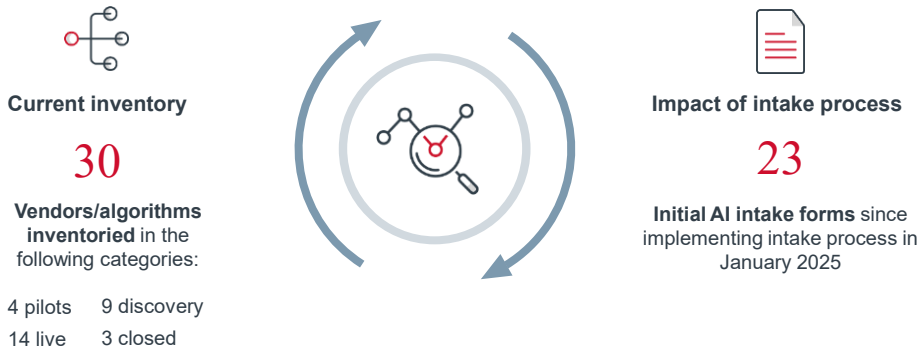


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AI inventory since implementing intake process



Early reflections from Baptist's experience

Early results



Handling AI projects in the pipeline while setting up governance has provided valuable learning experiences and shaped governance for future AI deployments.



Having a governance structure itself is a milestone. Now, no AI project goes live without being at least inventoried.



There's been a noticeable shift in mindset and culture. The organization now embraces the governance model as a necessary step for all AI initiatives.

Future considerations



Exploring AI governance software

Specialized software can more efficiently intake, evaluate, and monitor AI projects.



Contracting data scientists as needed

Expertise in data science can improve risk management profiles and provide more in-depth analysis of AI solutions.



Assessing how to expand governance team

The governance team is intentionally small now, but as more departments bring AI requests the team's scope will need to expand.

Key takeaways from Baptist

- 01 Enablement over approval:** An enablement-focused governance model empowers teams and integrates AI initiatives with broader business objectives.
- 02 Continuous learning and adaptation:** A governance structure that allows for ongoing learning from active AI projects allows you to adapt policies and procedures as the technology and organizational needs evolve.
- 03 Avoid duplication:** Integrate AI governance within existing organizational structures to leverage current resources and avoid unnecessary duplication of processes. This promotes seamless implementation and encourages broader acceptance across departments.

SCAN Health Plan

Prioritize high-impact, low-risk solutions

About SCAN Health Plan

ORGANIZATION OVERVIEW

SCAN Health Plan

- **The organization:** SCAN Health Plan is a not-for-profit Medicare Advantage (MA) plan serving more than 277,000 members across CA, AZ, NV, NM, and TX.
- **Background:** SCAN's Emerging Technology work group runs business impact assessments to evaluate how AI can address major business problems.

Key teaching points

Processes for adopting and implementing AI

- Create a standardized vendor evaluation framework
- Establish measures for success prior to adoption and regularly track progress once implemented



Strategies for identifying high-impact use cases

- Involve staff in brainstorming biggest challenges that AI could help solve
- Develop methods for prioritizing potential investments based on impact, risk, and ease



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Source: Peterson J. [How SCAN Health Plan leveraged AI to improve call center operations](#). Advisory Board. November 14, 2024.

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Evaluate AI's impact on existing business challenges

Brainstormed potential business problems



Prioritized which problem to tackle first



Held general education sessions to give employees a baseline knowledge of AI



Brainstormed inefficiencies contributing to "organizational debt"



Identified tasks that were considered the worst part of someone's job



Recognized problems considered unmanageable



Mapped each potential use case by value and effort:

- "Value": Ability to reduce cost or person-hours on low-value work
- "Effort": Ease of implementation, potential

Selected business problems that:

- Were persistent
- Presented a low potential risk
- Enabled long-term growth



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Source: Peterson J. [How SCAN Health Plan leveraged AI to improve call center operations](#). Advisory Board. November 14, 2024.

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Map potential investments based on effort, value

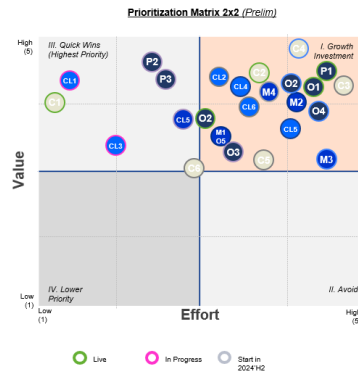
Brainstormed potential business problems

Prerequisites P1. Prerequisite 1 P2. Prerequisite 2 P3. Prerequisite 3			
Corporate (Champion Name) C1. Corporate 1 C2. Corporate 2 C3. Corporate 3 C4. Corporate 4 C5. Corporate 5 C6. Corporate 6		Market (Champion Name) M1. Market 1 M2. Market 2 M3. Market 3 M4. Market 4	
Health and Wellbeing (Champion Name) CL1. Clinical 1 CL2. Clinical 2 CL3. Clinical 3 CL4. Clinical 4 CL5. Clinical 5 CL6. Clinical 6		Operations (Champion Name) O1. Operations 1 O2. Operations 2 O3. Operations 3 O4. Operations 4 O5. Operations 5	

Legend

- Value: Ability to reduce cost or person-hours on low-value work, and alignment to long-term strategic goals (1= lowest value, 5 = greatest value potential)
- Implementation Feasibility: Ease of implementation based on execution complexity/risk and time to ROI (1= least feasible, 5 = most feasible)

Prioritized which problem to tackle first



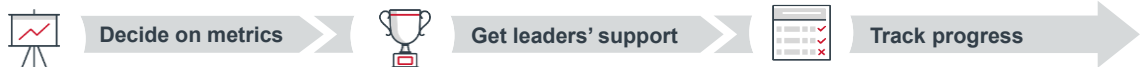
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Tie desired outcomes to financial impacts

SCAN's business impact model ties potential benefits to financial outcomes



- Decide on which metrics to track, like financial impact and member experience.
- Design method to measure metrics.
- Sample outcomes:
 - Reduced training time
 - Reduced attrition
 - Avoidance of new head count
 - Improved member experience score

- Bring model by finance and operations leaders, including the Chief Information Office, CVP of member experience, and the Investment Review Committee.
- Iterate on model until sign-off.

- Track progress at monthly Steering Committee meetings.
- Estimate time until return on investment (ROI).



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Source: Peterson J. How SCAN Health Plan leveraged AI to improve call center operations. Advisory Board. November 14, 2024.

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Use comprehensive vendor framework

Ensure vendor meets requirements

-  Scored potential vendor on five-point scale on detailed vendor evaluation framework.
-  Prioritized a vendor who could prove two fundamental qualities:
 - **Durability:** Partner trusted to endure the initial growth of players and provide a stable solution.
 - **Responsible use:** Partner can demonstrate responsible use of AI.

AI vendor questionnaire

Performance

- Have you demonstrated performance of your model in a test-pilot study? What were the results?
- How does the model err? Is there a preference for false positives versus false negatives?

User experience

- How do you collect user feedback on model scores or responses?
- How can a user seek assistance if there are issues? Who is responsible for handling the issues?
- How does user feedback inform future models?

Model operations

- How do you assess for bias on an ongoing basis?
- How do you monitor results?

Model refresh

- What is the minimum frequency of model retraining or fine-tuning?
- How much time do you expect SCAN employees to spend in support of retraining or fine-tuning?
- How do you adapt the model on new data?

Source: Peterson J. *How SCAN Health Plan leveraged AI to improve call center operations*. Advisory Board. November 14, 2024.



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Provide ongoing education and training

Successful rollout depends on end users accepting and using AI tools



Soft launch to work out early challenges

- Make necessary tweaks and respond to feedback before the full launch.
- Set up an anonymous chatterbox for employees to leave feedback without fear of judgement or pushback.



Ongoing education to get employees on board

- Offer training sessions aligned to different roles and flexible to employees' schedules.
- Monitor performance criteria for adoption across teams.



Early lessons learned from AI rollouts

- The process needs to be iterative as team tests functionality, shares feedback.
- There's a slight learning curve as it takes time for employees to adapt to the solution at their own pace.

Source: Peterson J. *How SCAN Health Plan leveraged AI to improve call center operations*. Advisory Board. November 14, 2024.



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Results: SCAN's AI solution for call center operations

Improve call center operations

- Partnered with Cresta to provide an AI solution to enhance call center efficiency and quality while emphasizing a member-centric experience.
- Call center member service advocates (MSAs) were challenged with increasing volume and variability of inbound calls from senior members.
- The tool supports MSAs through automatic transcription and AI-enabled assistance with notetaking, pulling information from the internal knowledge base, and suggesting talking points.

Results as of September 2024

96%

Adoption rate among eligible MSAs

82

Call-related net promoter score (NPS)

89%

Overall call satisfaction

78.5%

Calls with some form of AI assistance (hints, behaviors, automatic summary, search, guided workflow)

98.6%

Members agreed with "MSA you just spoke with explain(ed) things in an easy-to-understand way"

1.6 pt

Improvement in members who believe their issue was addressed in a single call between April 2024 and August 2024



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Source: Peterson J. *How SCAN Health Plan leveraged AI to improve call center operations*. Advisory Board, November 14, 2024.

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Key takeaways from SCAN Health Plan

01

Prioritize existing business challenges: AI has enormous potential, but it can be overwhelming to determine where and how to apply AI. It's helpful to narrow down AI's potential impact by starting with existing challenges.

02

Tie desired outcomes to financial impact: Clear financial outcomes are necessary to secure leadership's support and justify initial and ongoing investment in AI solutions.

03

Select vendor based on a comprehensive evaluation framework: AI is a rapidly growing market saturated with vendors, which can make vendor selection overwhelming. Additionally, the novelty of AI amplifies the need for caution and to responsibly engage with AI.



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OptumCare Florida

Ensure successful adoption by tuning models and adjusting to end user needs

About OptumCare Florida

ORGANIZATION OVERVIEW

OptumCare Florida

- **The organization:** OptumCare Florida clinics have more than 1,400 providers who serve about 185,00 patients throughout central and southern Florida communities.
- **Background:** Optum AI and the Center for Advanced Clinical Solutions (CACS) have collaborated to tackle the problem of kidney disease onset prediction and progression with AI-powered clinical decision support (CDS) tools. OptumCare Florida clinics recently deployed AI clinical prediction for chronic kidney disease as a live pilot.

Key teaching points

Processes for adopting and implementing AI

- Tune models to local data prior to implementation
- Involve end users in the creation, implementation of AI solutions



Strategies for identifying high-impact use cases

- Identify clinical challenges where solutions could have significant impact on outcomes
- Create solutions that provide both explainability and actionability to support end users

CKD needs disease onset prediction



Chronic kidney disease can lead to end stage renal disease (ESRD) or kidney failure. Dialysis, transplants, and treatments for ESRD and kidney failure are **expensive and disruptive to a patient's life**, and therefore **preventability and interventions are key** to change the course of the disease.



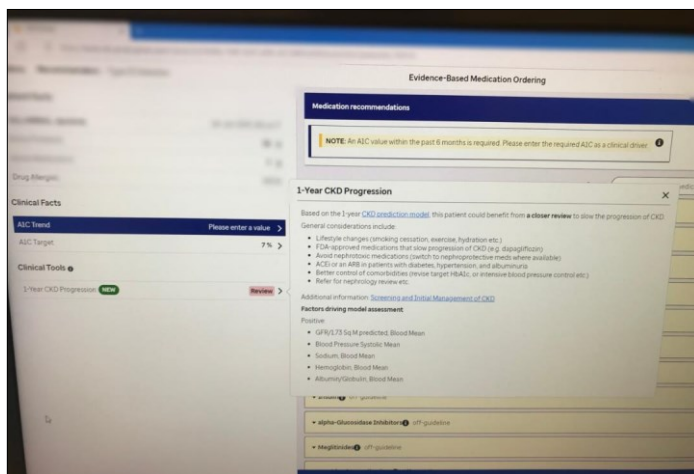
More than **1 in 7 adults** (37 million people) in the U.S. may have CKD, and every day, more than **360 people** begin treatment for kidney failure.



In 2020, Medicare fee-for-service (FFS) beneficiaries aged ≥66 years with a diagnosis of CKD **accounted for over \$75 billion in Medicare FFS spending**.

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CKD prediction model built to operate within EHR

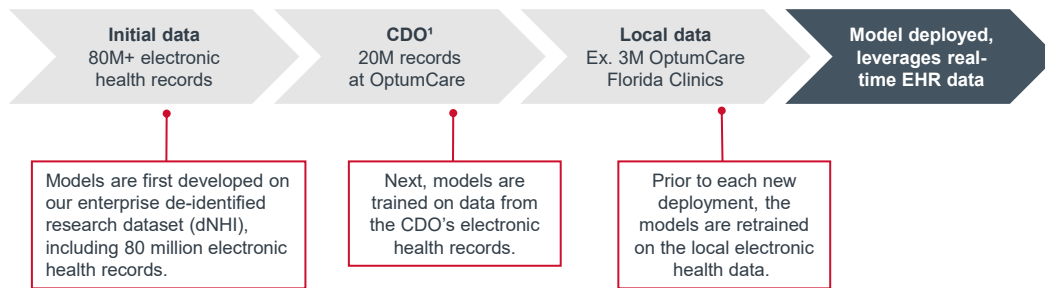


CKD tool on a clinician's screen **notifies the clinician** of the risk of CKD progression, **suggests possible interventions** for clinician to consider, and **explains the factors** that are causing the model to flag the patient.

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A multistep process creates locally tuned models

Model development, deployment pathway dependent on a variety of data sources



1. Care delivery organization.

Source: Advisory Board interviews.



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Design tools with end user feedback

Conducted user experience (UX) interviews to learn how tool fits into clinical workflows

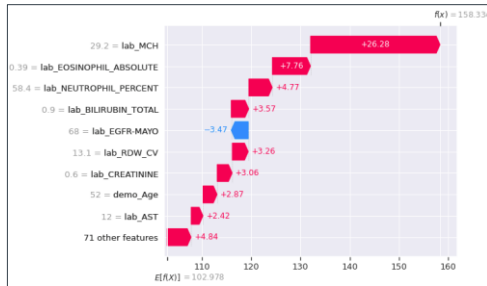


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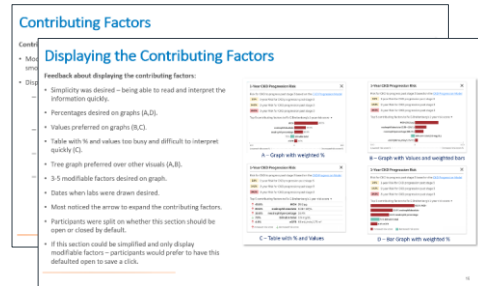
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Model explainability — solving the black box problem



Patient A risk score explanation by feature



UX research with clinicians on contributing factors

- The inability to see how machine learning systems make their decisions is known as the “black box problem”
- Explainability, the concept that a machine learning model and its output can be explained in a way that makes sense to a human, is critical
- Used SHAP (SHapley Additive exPlanations) to share the details of the risk score drivers for chronic kidney disease

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Provide details to clinicians, staff prior to rollout

Communication sent to clinical and nonclinical staff

Clinical AI Model Deployed within Optum Florida Clinics

This message is to Optum Florida center-based Clinicians, Medical Directors, and Administrators.

Team,

Although the use of artificial intelligence (AI) in healthcare is accelerating rapidly, there are limited examples of such techniques being successfully deployed into clinical practice, **we are thrilled to announce that we launched our first real-time, in-clinic AI disease model into production within our Optum Florida clinics.**

What is AI?

- This AI-driven disease progression tool is a real-time, in-clinic chronic kidney disease (CKD) AI powered notification within the CACS CDS recommender.
- AI model leverages live clinical data and highlights a patient's likelihood of progressing to late-stage chronic kidney disease in the next year.
- This provides a window for clinicians to appropriately intervene to slow the progression to end stage renal disease.

"The application of AI/ML in the progression model of Chronic Kidney Disease is not only clinically remarkable but serves as a potent educational tool for our patients. This significant stride toward the incorporation of AI/ML in healthcare, particularly in clinical settings, is nothing short of revolutionary. At Optum, where I'm privileged to be immersed in cutting-edge tools and technology, I'm continually inspired by the synergy between healthcare practitioners and tech innovators. Our collaboration provides a unique glimpse into what's possible, signaling a bright future for healthcare delivery and patient empowerment." - Dr. Casey Jimenez MD, MBA/BNF

Thank you to all the Optum teams involved including our clinical and technology colleagues in Florida.

Provides a basic explanation of where the AI will be used, what it will be used to do, and why

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Results and future disease models

Timeline

18 months

Development and deployment time

Lessons

Process helped lay a strong groundwork to support rapid development and deployment of future predictive models.

Future conditions



Diabetic foot ulcer



Chronic obstructive pulmonary disease (COPD)



Hypertension

Launch feedback

“The application of AI/ML in the progression model of Chronic Kidney Disease is not only clinically remarkable but serves as a potent educational tool for our patients. This significant stride toward the incorporation of AI/ML in healthcare, particularly in clinical settings, is nothing short of revolutionary...”

DR. CASEY JIMENEZ, ————”
MD, MHA/INF
OptumCare Florida



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Source: Advisory Board interviews.

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Key takeaways from OptumCare Florida

01

Prioritizing workflow compatibility enhances clinician adoption:

Dedicated efforts make the new tool work effortlessly with doctors' existing routines, ensure it's user-friendly, and provide just the right information for patient care.

02

Strategic focus drives better outcomes:

Optum was focused on using tech to catch diseases early and act fast, which is crucial for improving health outcomes and reducing healthcare costs.

03

Scalability and reusability pave the way for future innovation:

Careful planning in creating solutions that can expand and adapt will set the stage for ongoing innovation in healthcare technology.



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Putting it all together

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Replicate what led to others' successes

2 key areas of focus across the case studies

Processes for adopting and implementing AI

- Establish governance and oversight
- Secure executive buy-in
- Educate leaders and end users
- Ensure end-user adoption, change management

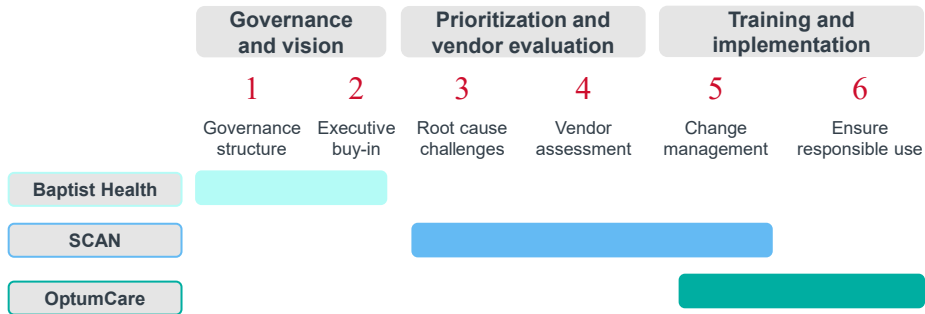


Strategies for identifying high-impact use cases

- Conduct root cause analyses
- Create prioritization frameworks
- Build vendor and market landscape assessments
- Source multi-stakeholder feedback

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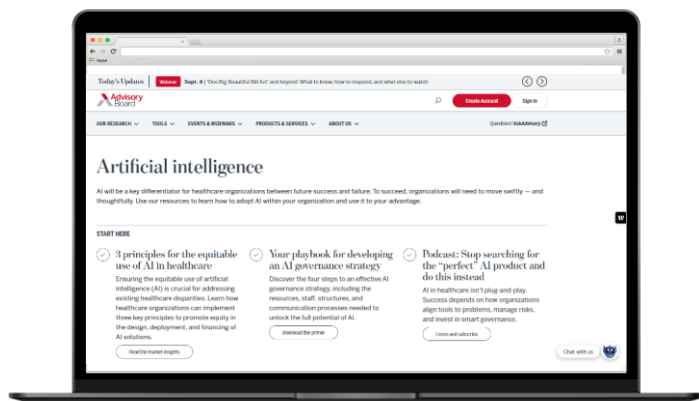
Multiple ways to build key building blocks



Key takeaways

- 01 A centralized, multidisciplinary governance structure is required to ensure responsible, sustainable, and effective AI investment.
- 02 Be prepared for the significant resource investments that come with evaluating AI solutions for fairness and bias, tuning models to your local population, and continuously monitoring solutions once implemented.
- 03 To identify key investments in a noisy market, conduct prioritization exercises to find high-impact, low-risk AI solutions. Don't forget to consider challenges that you may have previously considered unsolvable.
- 04 Involve end users early and often into AI decisions to ensure correct use of AI solutions and to ensure these solutions fit into existing workflows.

Access our full suite of AI research here



Our research library includes resources on:

1. Governance resources and case studies
2. Educational materials for board members
3. Guidance on how to take a problem-first approach to AI investment
4. Principles for responsible use
5. Radio Advisory podcast episodes

[AI resource library](#)



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Continue the conversation



Schedule a “Why AI Matters” presentation at your organization.



Leverage our experts by scheduling a phone conversation or submitting a question to AskAdvisory.



Participate in Advisory Board’s ongoing research into AI in healthcare. If interested, reach out to Ty Aderhold at aderholdM@advisory.com



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2025 event calendar at-a-glance

ADVISORY BOARD SUMMIT SERIES

Reimagine healthcare: 3 transformation imperatives¹

Washington, DC April 29–30	Carlsbad, CA May 20–21	Virtual July 15–16	Chicago, IL October 7–8	Nashville, TN November 18–19	Virtual December 9–10
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[Preview session](#)

Summit topics

- 1** Adapt to new market dynamics
 - Build the ambulatory network of the future
 - Plan for changing health system investment priorities
 - Break the tension between plans and providers
- 2** Build tomorrow's care model today
 - Modernize service line management
 - Pursue an appropriate approach to value-based care
 - Redefine nursing excellence
 - Future-proof key specialties: cardiovascular and oncology
- 3** Embrace digital competencies
 - Put AI to work
 - Revolutionize digital consumer experience

1. Each summit includes a welcome reception for attendees the evening before the event begins



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ROUNDTABLES

The future of surgery: Navigating site-of-care shifts and emerging technologies
February 11 | Virtual

The future of specialty care: Spotlight on oncology
April 2 | Virtual

Weight loss care models in the age of GLP-1s
June 3 | Virtual

Physician leader strategy: Shaping the future of integration and access
June 17 | Washington, DC

How to thrive in an evolving nursing landscape
August 18–19 | Washington, DC

How to deliver the next era of VBC
October 15–16 | Washington, DC



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