

A Checklist for Improving Patient Adoption

AI agents can dramatically improve how patients access care and reduce staff workload—but only if patients are comfortable using the AI.

Use this checklist as a practical guide to help your patients understand, trust, and confidently interact with your AI front desk assistant.

Train – Inform – Repeat

If there's one thing to remember, it's this:

Train your team. Inform your patients. Repeat—often.

1. Train Your Team First

Before patients can trust AI, your staff needs to trust it.

- ☐ Make sure staff understands what the AI can and cannot do
- ☐ Align on simple, consistent language to describe the AI to patients
- ☐ Reinforce that AI is part of the team, not a replacement

💡 Remember: every patient interaction is an opportunity to help patients become comfortable using the system. **When staff sound confident, patients follow.**

2. Inform Patients Early

Patients shouldn't be surprised when they interact with AI.

- ☐ Explain what the AI helps with (scheduling, refills, FAQs, etc.)
- ☐ Explain why it's being introduced (faster access, multilingual support, convenience)
- ☐ Use plain language—avoid technical explanations

💡 Remember: **sometimes it takes hearing the same message several times** before patients really internalize it and start using the AI.

3. Make It Sound Easy (Because It Is)

A lot of patient hesitation comes from fear of “doing it wrong.”

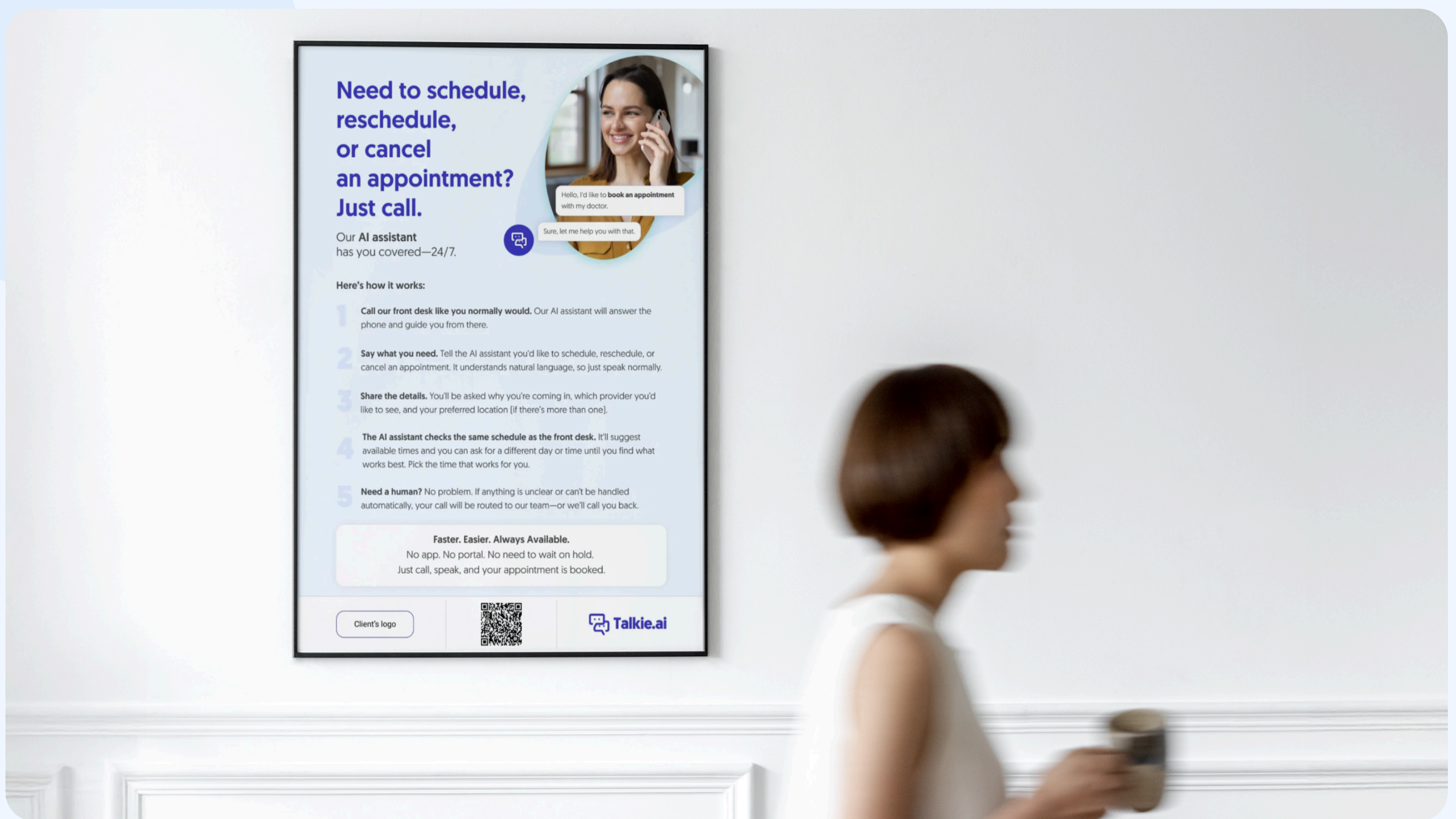
- ☐ Emphasize that AI works like a normal conversation
- ☐ Reassure patients they can correct themselves or try again
- ☐ Reinforce that help is always available if needed

4. Repeat the Message Across Channels

Not every patient will read every email—or notice every poster.

- ☐ Use emails, texts, in-office signage and videos, and staff conversations
- ☐ Repeat the same core benefits everywhere
- ☐ Don't worry about repetition—it builds familiarity

💡 Remember: when you're tired of saying it, patients are just starting to hear it.



5. Normalize AI with Social Proof

People follow what feels familiar and widely used.

- ☐ When possible, share adoption milestones with patients
- ☐ Highlight how many other patients are already using the AI and how much time they're saving
- ☐ Use real numbers to show that other patients are using it already (if you're working with the Talkie team, you'll get such data on a regular basis)

👉 Example: “70% of appointments last month were scheduled using AI.”

6. Listen, Learn, Adjust

Adoption is an ongoing process.

- ☐ Collect patient feedback where possible
- ☐ Look for patterns in what patients use most—and what they potentially avoid using
- ☐ Adjust messaging and workflows as needed

Successful AI adoption requires consistency.

Train your team. Inform your patients. Repeat the message.

When AI feels familiar, easy, and helpful, patients will use it.

Want to consult on how to make front desk AI work for your practice?

[Book a time with our team](#)