

A Step-by-Step Guide to Improving Patient Adoption of AI Agents



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AI agents can dramatically improve how patients access care—eliminating long hold times, offering 24/7 support, and making common tasks like scheduling and prescription refills faster and easier.

However, these benefits are only fully realized when patients are comfortable using the AI.

The objective of this guide is to help your practice improve patient adoption of AI agents. While implementing AI is an important first step, **ongoing communication, staff alignment, and consistent reinforcement are what drive long-term success.**

This guide provides practical strategies, ready-to-use communication tactics, and supporting resources to help your patients understand, trust, and confidently interact with your AI assistant.

Throughout this process, the Talkie team works closely with your practice—offering guidance, recommendations, and hands-on support—so you're never navigating patient adoption alone.

1. Preparing Your Practice for AI Adoption

Training Front Desk Staff

- Provide your front desk staff with the [cheat sheet](#) which outlines how to promote the AI and respond to patient questions. This resource includes sample phrases, key benefits to highlight, and guidance for addressing common concerns.
- Encourage staff to reinforce the AI's benefits consistently—every patient interaction is an opportunity to help patients become comfortable using the system.

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



How to talk to patients about the AI assistant

How to **mention the AI assistant to a patient** during an interaction, e.g. when scheduling their next visit?

"I'll book you in right now, but have you had a chance to speak to our new AI assistant yet? We recommend you give it a chance. It can handle this and many other requests, like prescription refills or appointment rescheduling, without any wait time, even after hours."

What to tell a patient who **asked to be transferred to a human** even though their request could be performed by AI?

"I understand you'd rather speak to one of us. However, if you let the AI resolve your case, the service will be faster. The assistant has access to the same information we do, so it can do what any team member does."

When a patient says:	You can respond with:
"Why are you doing this?"	"It helps patients get what they need much faster, especially during busy times."
"I don't want to talk to a robot."	"I understand. The AI assistant is simply a new tool in our toolkit. Our team is still on the other end during business hours and we'll do our best to answer directly if we're not occupied with other matters at the practice."
"This is just a cost-cutting move."	"I hear your concern. Our main reason for implementing AI was that we often had long hold times on the phone—so we want patients to get faster, more personalized service."
"What if the AI gets something wrong?"	"The AI assistant handles simple steps quickly, but if something isn't clear, it will double check and put you through to a person if necessary. You're never stuck."
"I don't think a robot will be able to help."	"Try it once. Give it a go. Most patients end up liking how fast and convenient it is."
"How will the AI know what I need?"	"Our AI assistant can do exactly what any team member does. It has access to the same information we do and we get all the information it writes down in the system. Nothing

	is ever lost and in case anything is unclear, we can review what you said to the AI and make adjustments.”
“I don’t trust a robot with my medical information.”	“I hear you. Your information is safe—the AI assistant follows the same privacy rules we do. It just helps you get answers faster.”
Overall message: “We’re adding a new phone assistant to make your experience faster—you’ll still be able to talk to our team, but many things can be handled immediately without waiting.”	

Setting Expectations for Staff

- Make sure everyone at the practice understands what the AI can and cannot do. For example, the AI will leave summaries of patient messages in your EHR. If a message requires a follow-up call, it’s up to your staff to respond promptly—otherwise, patients may lose trust in the AI.
- The AI is part of the team: it handles routine tasks so others can focus on higher-value care. A united front between staff and AI ensures a smooth patient experience. If your staff is in any way concerned about the AI—let’s talk about it during one of our check-ins. The Talkie team is here to support you.
- Remember that you’re not doing this alone. The Talkie team is there to help your practice succeed—whether that means answering questions, suggesting improvements, or helping refine workflows and patient messaging. Everyone involved shares the same goal: satisfied patients and an easier experience for both patients and staff.

 **Why This Is Important:** Setting clear expectations prevents misunderstandings and ensures that staff know exactly how to support patients interacting with AI. When staff understand their role in maintaining trust, they are better prepared to handle patient concerns.

2. Communicating the Benefits of AI to Patients

Highlight Key Patient Benefits

When talking to patients, focus on the benefits they will experience, for example:

- **Faster Access:** Patients no longer wait on hold. They can interact with the AI at any time to schedule appointments, request prescription refills, or get answers to common questions.
- **Convenience:** AI is available 24/7, via phone or text, giving patients the flexibility to manage their healthcare on their own schedule, reducing unnecessary office visits or phone calls.
- **Ease of Use:** Interacting with the AI is like having a normal conversation. Mistakes are easy to correct, and patients quickly gain confidence in using it. (*"At our practice, X% of patients already use it regularly"*)
- **Personalized Experience:** AI handles routine tasks, so patients' needs are addressed promptly with minimal effort.
- **Increased Autonomy:** Patients can take control of their healthcare independently, scheduling appointments or refilling prescriptions without relying on office hours.
- **Multilingual Support:** The AI speaks multiple languages, allowing patients from diverse backgrounds to communicate comfortably in their preferred language, improving accessibility and reducing barriers.

 Remember: not every patient will see every message or email, so it's important to repeat the key points consistently across channels.

Making AI Use Clear and Simple

- Explain in plain language how the AI works and what tasks it can handle. Short, clear instructions work best on emails, posters, texts, and in-person explanations.
- Remind patients that the AI works alongside the practice staff to make their experience easier, not to replace human support.

 **Why This Is Important:** Consistent messaging across multiple touchpoints builds patient trust, increases adoption, and ensures patients understand the full benefits of using the AI. The Talkie team will help you refine patient-facing messaging over time, ensuring it stays simple, accurate, and effective.

3. Patient Communication Strategies

Emails and Text Messages

- Use the **pre-written email and text templates** provided to introduce patients to the AI. These messages clearly explain the benefits, including faster access to care, 24/7 availability, and multilingual support.

Rollout timeline and communication plan — To maximize patients adoption

Step	Details	Link
STEP 1	4–6 weeks before launch Announcement campaign	Click here to open
STEP 2	1 week before launch Reminder message	Click here to open
STEP 3	From launch day “We’re live” announcement	Click here to open
STEP 4	4–6 weeks after launch Reminder message	Click here to open

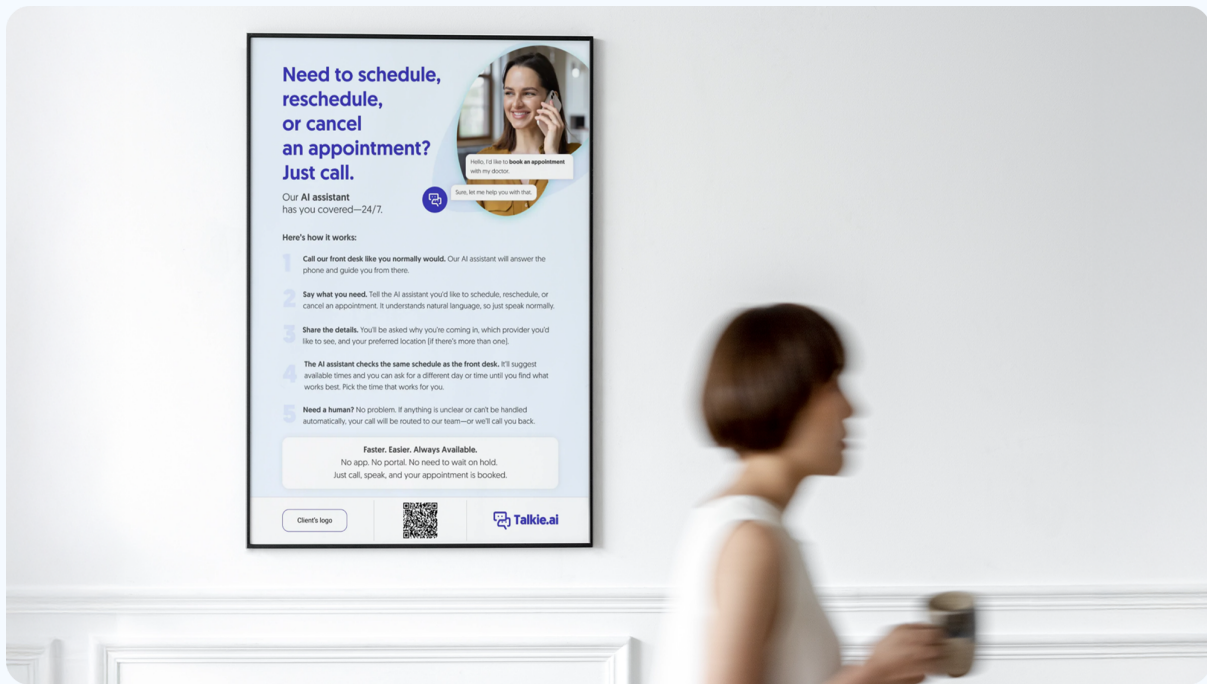
- After launch, send follow-up messages to reinforce its use and highlight successes, for example:
 - “Did you know X% of our patients now schedule their appointments using our AI?”
 - “Skip the wait—let our AI help you request refill prescriptions quickly and easily.”

The Talkie team can help review and refine these messages based on patient response and adoption trends. Let us know if you need any additional materials!

- Consistently mentioning the AI in communications helps patients become familiar and comfortable with using it.

Educational Materials (Posters, Leaflets, Videos, Website Content)

- Display posters and leaflets throughout the practice—waiting areas, exam rooms, and near check-in counters. You can also play a video on waiting room screens and include a message on your website.
- Offer materials in multiple languages to make them accessible to all patients (need materials in a language other than English or Spanish? **Let us know at support@talkie.ai!**)
- Encourage staff to hand out the leaflets about the AI and answer any questions if patients are unsure how to use it.



Key Message for Patients

“Our AI assistant is here to make your experience easier—helping you schedule appointments, refill prescriptions, and get answers to common questions quickly and conveniently. It works alongside our team to give you faster, simpler access to care.”

Why This Is Important: Repetition across emails, texts, and in-practice materials helps patients notice and trust the AI. Multiple touchpoints make it more likely patients will use the system and have a positive experience.

4. Building Patient Confidence in AI

Common Concerns from Patients

Some patients may initially hesitate to use the AI. Typical concerns include:

1. “I just prefer talking to a human.”
2. “What if the AI doesn’t understand my issue?”
3. “What if I make a mistake or say the wrong thing?”

Addressing Concerns

- Reassure patients that the AI is constantly learning and improving. It can handle most routine tasks, but if it encounters something it cannot resolve, it will transfer the patient to a human staff member.
- Remind patients that the AI is forgiving—they can correct themselves or try again without any problem.
- Encourage staff to reference the cheat sheet and pre-written email or text templates when responding to questions. The Talkie team regularly helps practices refine how these concerns are addressed based on real patient feedback.

Highlighting the Human Touch

- Explain that **the AI does not replace staff**. Instead, it supports the team by handling routine tasks, freeing staff to provide more personalized care for complex needs.
- Patients should understand that AI is a tool designed to enhance their experience, while they always have access to human support when needed.



Why This Is Important:

- Understanding and directly addressing patient concerns reduces hesitation and builds trust in the AI system.
- Clearly communicating the role of AI alongside staff ensures patients feel supported, confident, and comfortable using the technology.

5. Ongoing Support and Engagement

Continuous Communication

- Send periodic emails or text messages to remind patients of the AI's capabilities and encourage them to use it for future interactions.
- Examples of reminders include highlighting the AI's ability to schedule appointments, refill prescriptions, answer FAQs, or provide quick updates.
- Regular messaging helps patients become comfortable and confident using the AI over time.

 **Why This Is Important:** Ongoing communication reinforces the habit of using the AI, keeps it top of mind, and ensures patients understand the value it provides. The Talkie team can advise on timing, messaging, and frequency based on what works best across practices.

Collecting Feedback

- Provide simple ways for patients to share feedback about their AI experience, such as short surveys, a feedback form on the patient portal, or direct responses to follow-up messages.
- **Feedback does not need to be analyzed or acted on by your team alone.** The Talkie team regularly reviews feedback with you during check-ins, helping identify patterns and recommending specific improvements or adjustments to the AI experience.

 **Why This Is Important:** Gathering feedback helps identify areas for improvement, ensures the AI is meeting patient needs, and demonstrates to patients that their opinions are valued. Reviewing feedback with Talkie's guidance turns it into clear, actionable next steps—without adding extra stress or guesswork for your team.

6. Analyzing Results and Iterating

Tracking Adoption Rates

- Talkie provides your practice with regular reports that show how patients are using the AI and where it's delivering the most value. These reports may include metrics such as:
 - Percentage of appointments scheduled through the AI
 - Number of prescription refills processed
 - Common questions answered without staff intervention
- These metrics are reviewed together with the Talkie team, who help interpret the data and highlight opportunities for improvement or optimization.

- Where it makes sense, Talkie will also recommend which metrics can be shared with patients—for example, how many other patients are already using the AI and how much time they're saving—to reinforce that using the AI is common, easy, and effective.

Iterating Based on Feedback

- Combine patient feedback with adoption metrics to refine your communication and support strategies—with Talkie's guidance. For example, if certain patients are still hesitant to use the AI for prescription refills, the Talkie team can help recommend messaging updates, workflow tweaks, or AI behavior adjustments to address those concerns.
- Share adoption milestones with patients in follow-up communications, for example:
 - "Last month, X% of scheduled visits were booked using our AI assistant—each visit was scheduled X minutes faster than if booked with a human. Join the many patients enjoying faster, easier scheduling!"

Why This Is Important:

- Continuous evaluation ensures that patients are fully benefiting from the AI system—while Talkie partners with your practice so that your team doesn't need to figure everything out on their own.
- Sharing adoption numbers publicly reinforces that using the AI is common, simple, and reliable, which further encourages patient engagement.

Start implementing these strategies today to encourage patient adoption of your AI assistant. Consistent communication, staff training, and ongoing engagement will ensure a smooth transition, improve patient satisfaction, and help your practice operate more efficiently.

Patient adoption doesn't stop at launch. If you have questions, want feedback on patient messaging, or would like to review adoption data together, reach out to the Talkie team at support@talkie.ai.