

CONFIDO HEALTH

Transforming Healthcare with AI-Agent-Led Workflow Automations



Admin Overload – #1 Operational Crisis in US Healthcare

US healthcare wastes [\\$21.6 billion annually \(NIH\)](#) on admin inefficiencies, with over [40% of hospital expenses](#) going towards non-clinical work instead of [patient care \(AHA\)](#).

Core Issues

41%

Clinician Shortage
3M understaffed market

80%

Provider Burnout
Due to admin burden

73%

Patients say care needs unmet
Poor Patient Experience



Problem Statement

In US hospitals and clinics, front-desk, mid-desk, and back-office staff have to manage a wide range of administrative tasks, such as:

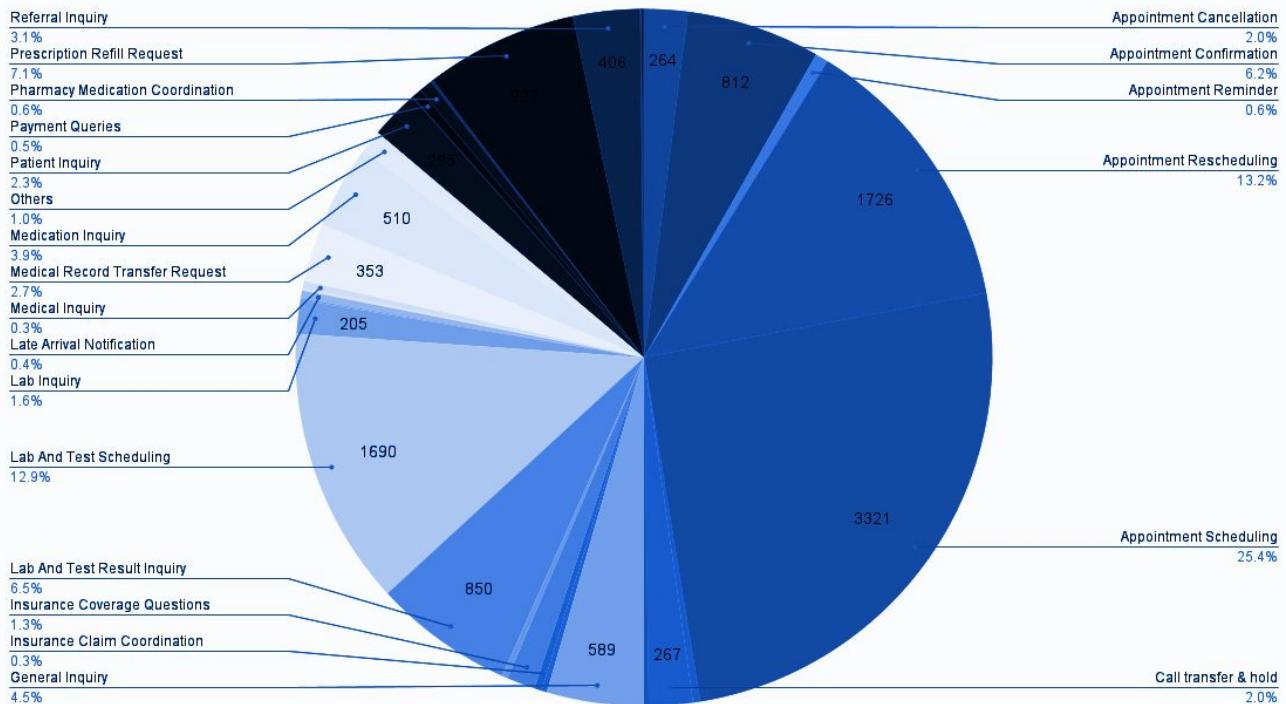
1. Scheduling appointments and responding to clinical and other patient queries via phone or email.
2. They also coordinate appointments by managing the complex calendars of doctors.
3. Additionally, they must enter finalized medication and appointment data into the universal EHR system.
4. They are responsible for ensuring billing is done correctly by capturing accurate insurance information.
5. On the back end, they have to work with insurance companies to ensure providers get paid.
6. All of these are manual tasks that cause burnout and lead to gaps in patient follow-up—which can mean missed appointments and lost revenue.

Hence, there is a huge opportunity being lost!



Typical Break-up of Calls at a Healthcare Practice

Call Topic Distribution





How Staff Burnout, Missed Calls, and Poor Oversight Costs Millions



Unanswered High Call Volume:
Missed calls and voicemails lead to lost appointment opportunities.

Average missed-call volume:
20-25% of which 40-50% are around new appointment scheduling



Missed After-Hours Calls & Lack of Patient Recalls:
Rising after-hours call volume goes unanswered or unmonitored.



Inadequate Appointment Management Oversight:
Lack of staff monitoring hampers patient engagement and communication.



Inconsistent Communication Strategies:
Staff language efficiency varies, impacting engagement across diverse patient demographics.



Confido's AI Agents Simplify Admin, Boost Operations

Source Systems

EHR | PM | CRM | RCM | IVR

Third-Party systems and data

Billing | SDOH | TCM | RCM

Operational Insights

Past interactions | Transcripts | Engagement trends



Agent Sara : Pre-Visit Coordination

- Patient Queries & Follow Ups
- Appointment Management
- Insurance Verifications
- Clearances & Logistic Support

Agent Lily : Care Management

- Post Procedure Care Outreach
- Surveys & Experience Feedback
- Payment Processing

Agent Ryan : Post-Visit Transitions

- Patient Recall
- Post-Discharge Monitoring
- Follow-up Scheduling



Built Exclusively For Complex Healthcare Workflows

Technology for scale

- Robust infra to handle **multi-speciality nuances**
- Pre-built templates for **>10 specialities**
- Healthcare specific training data
- Complex integrations with **PMS/IVRs**

Safe & Reliable

- **HIPAA Compliant**
- Industry **best latency** and success rates despite complex integrations
- **Less than 5%** call forwarding rates
- **100% adherence** with multi-layered protection to avoid hallucinations

Embracing Convenience

- Compatible with 30+ **EMRs**
- **Zero setup fees**
- **Flexible Month Subscription**
- Integrate once and **scale rapidly**

70%

Call volume reduction

3x

Higher follow-up encounters

97%

Increase in patient satisfaction

80%

Lower cost than staff



Seamlessly Integrates With 40+ EHR/PMS/IVR

EMR/PMS Systems Integrations



Opendiftal
software



CARESTACK

Voice System Integrations



RingCentral



SpectrumVoIP™



VoiceStack





Confido Impact: Unlocking \$40k/month for a Group Practice

PRE CONFIDO

2+ hrs/day lost to admin work across 30+ offices

20% no-shows across 5K+ monthly appointments

6,000+ voicemails went unanswered every month

\$200K+ monthly revenue lost to admin inefficiencies

POST CONFIDO

2+ hrs saved daily across 5K+ appts = \$20K/mo ROI

50%+ reduction in no-shows/cancellations

Zero unattended voicemails

50% fewer no-shows = 5 more appts/month across 30+ offices



Product Roadmap

Front Office Outbound

1. Scheduling
2. Apt Confirmations
3. Cancellations/
Rescheduling

Expanding into Mid Office

1. Pre/Post- Ops Care
2. Prescription Refills
3. Chronic Care Management
4. TCM/ Discharge Follow Ups

Back Office Payor Facing

1. Denial & AR
Management
2. Prior authorizations
3. Claim Follow Ups



Front Office Inbound

1. Waitlists/ Recalls
2. Patient inquiries
3. Patient Intake
4. Clinical Triage

Back Office Patient Facing

1. Eligibility & Insurance Verification
2. Patient Statement
3. **Payment Collection & Reminders**
4. NOAs, Referral and Fax-based Calls



Meet the Team

Title	Name	Description
Co-founder/ CEO	Chetan Reddy	Overall company, hiring, Sales, strategy
Co-founder/ CPO	Vichar Shroff	All product, and tech team head
Lead Engineer	Ananyo Rao	Leads implementations, integrations
Director of CS & Events	Simran Parikh	CS for client implementation, metrics, marketing events
Chief of Staff	Karan Jhaveri	Hiring, finance, compliance, investor management, team
Head of AI	Avneet Chugh	AI Research and Development



Meet the Team

Title	Name	Description
Tech Team - Integrations	Ashutosh Sangwan	Integrations expert under Vichar's pod
Tech Team - Deployment & Integrations	Rishabh Sharma	Deployment & integrations expert under Vichar's pod
Tech Team - Metrics & CSA	Aditya Mishra	Handles metrics and Client Success Analytics under Vichar's pod
Forward Deployed AI Engineer	Nabeel Chhatriwala	Handles deployments at client locations
Forward Deployed AI Engineer	Punit Dhoot	Handles deployments at client locations
Forward Deployed AI Engineer	Dharmil Shah	Handles deployments at client locations

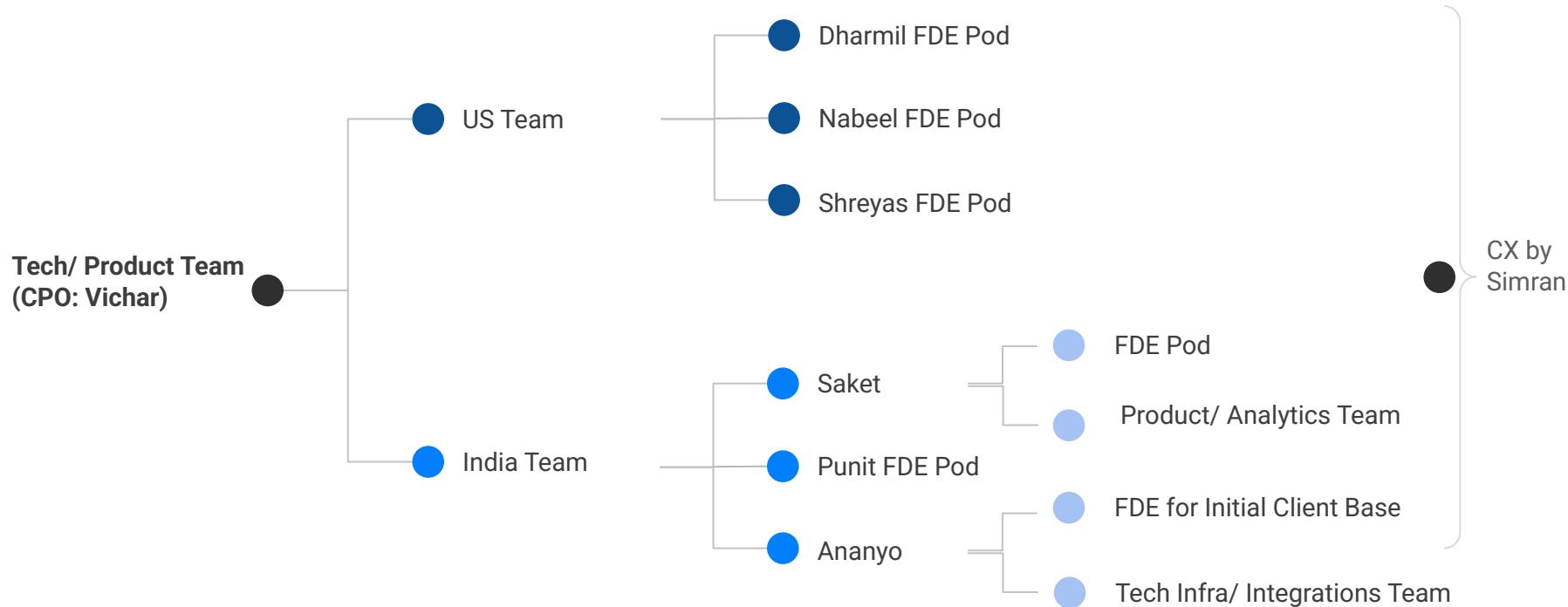


Meet the Team

Title	Name	Description
GTM Operator	Akash Vi R	Manages leads, part of GTM team under Chetan's pod
Product Marketing Consultant	Juilee Dhakappa	Creates content, part of GTM team under Chetan's pod
EHR Operations Coordinator	Anaina Jhonson	Ensures product workflow is performing well
EHR Ops Associate	Sai Nogdala	Ensures product workflow is performing well
Data Analyst	Angelina	Ensures product workflow is performing well



Tech/ Product Team Org Chart



Across all clients/ workflows: **Product** is overseen by **Saket**, **Tech infra** is overseen by **Ananyo** and **CX** is overseen by **Simran**



Best Practices & General Guidelines

Please make a note the following best practices that are essential to smooth functioning

- Folder Management -
 - During the onboarding process, please ask your onboarding manager to provide you with relevant access to shared folders
 - For Tech Team - All client requirements and modifications should be promptly saved in the relevant folders for version control and rollbacks if needed
- Time Management -
 - As the team is split between US and India, we use the time difference to our advantage and can operate on a 24 hour working cycle
 - Based on your role and dependency on cross-border team members, please coordinate to expedite execution and improve efficiency in all projects

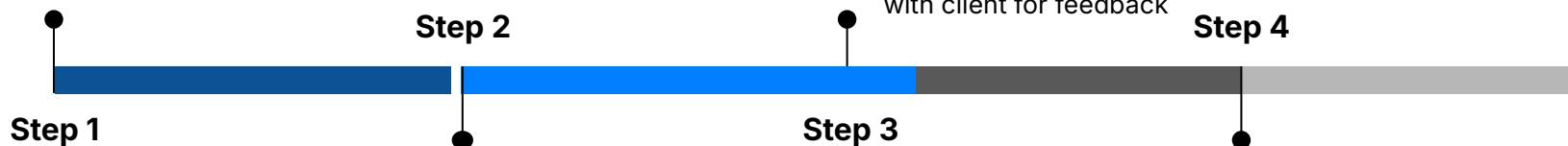


Client - Implementation Process

ONBOARDING:

Collect data from the client:

1. Admin access and PW of their EHR/ PMS
2. Admin access to IVR (Voice Systems)
3. Existing client scripts
4. Calendar & procedure instructions
5. Client preferences on tone/ prompts



Confido team will assess the call recordings from IVR to understand the conversation flows, detailed call volume and assess EHR to understand provider availability and calendar rules & develop a Pre-Confido report

AI PROMPTING & DEMOS

Based on CSA, Confido Team shall prepare AI demos based on the scripts, procedures available, calendar instructions, voice selection. This includes different Agents for different workflows eg., New Appointment Agent, Rescheduling Agent, Inbound call agent, outbound call agent, etc.

The team shall present the demos + test number with client for feedback

Step 4

GOING WORKFLOW LIVE & METRICS

Once client is satisfied by the testing, we go live with 1 pilot workflow/ location. Based on comfort of both parties, we start scaling to all workflows and locations for optimal impact. Confido continues to monitor metrics to ensure we are on track & support client in case of any bugs, or changes requested by the client



Resources – Background Research

Title	Google Drive Link
U.S. Healthcare 101	US Healthcare 101 - Google Docs
Deep Dive into Medical and Dental Practices	Understanding US Medical & Dental Practice Ops - Google Docs
Competitor Names	Assort Health, Hyro AI , Talkie.AI, Hello Patient, Parakeet, Arini, Infinitus
Major EHRs	Eclinicalworks, Carestack, Dentrix, NextGen, Open Dental
Major IVRs	Ring Central, Mango



Resources - Brand Guidelines

Title	Google Drive Link
Brand Guidelines	<u>Brand Guidelines_2025 - Google Drive</u>
Brand Assets	<u>Brand Assets (2025) - Google Drive</u>
Brand Logos	<u>Logos - Google Drive</u>
Fonts	Header: Poppins Body: Inter Normal (Download from here) (Ensure consistency in font size, colors, spacing, margins, grammar throughout the documents)
Color Palette	Refer to the Brand Guidelines Document



Resources - Engineering

Title	Google Drive Link
Core Engineering Steps	Client PM Tracker template , Engineering Basic Steps & Project Planning Template (Please don't make any changes in this sheet- download a copy and then utilize)
Demo Sample	Demos - Google Drive
Scripts Sample	Onboarding - Google Drive
Current State Assessment	DRG Project Document - Google Docs Client Analytics Report- Pre & Post Implementation Template Alpha Metrics
Platform Overview Slide	Hope Health Demo bi weekly - Google Slides
Outbound Assessment	Hope Health Outbound Call Report detailed - Google Docs
Inbound Assessment	Hope Health Inbound Call Report with Insights - Google Docs
Sample Access Needed (Please contact Ananyo/ Vichar)	openphone access, read ai access, retell.ai access, tech docs, develop dashboard access, zoho vault access, EMR + IVR access (client), sample prompt access, chatgpt pro access, OpenAI API access



Resources - GTM

Title	Google Drive Link
Implementation Roadmap For Clients (Sample)	<u>Implementation Roadmap_Confido <> York Hospital - Google Docs</u>
Sales Deck	<u>Confido_Health_Nuance_July 2025 - Google Slides</u>
Demo Videos	<u>Demos - Google Drive</u>
Conference folder	<u>Conference - Google Drive</u>
Podcasts	<u>Dental Playbook & Trends USA - YouTube</u>



That's a Wrap - Welcome Aboard!

Thank you for joining Confido Health - we're so excited to have you with us!

As you get started, remember that client privacy and data protection are at the heart of everything we do. Please take every precaution to handle sensitive information securely.

This is just the beginning - we encourage you to reach out to teammates across departments and set up virtual coffee chats to start building connections and learning the ropes.

We're thrilled to have you on this journey. Welcome to the team!