



The Connected Clinic 2026: Unifying Care, Operations, and Patient Communication

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About Metrigy | About GoTo

AI and CX: The New Frontier in Patient Engagement

As a practice owner, your goals are clear: achieve better healthcare outcomes, grow your practice, and ensure your patients have a positive experience—all while meeting strict privacy and regulatory requirements. Providing excellent care means always being available to support your patients, no matter when or why they reach out, including the top 10 reasons why patients reach out, as listed below. If your practice isn't handling patient communications efficiently, things can quickly go wrong, leading to broken patient-provider relationships, damage to your reputation, loss of revenue, and staff burnout. Fortunately, customer experience (CX) technology, including artificial intelligence (AI), can help address these challenges. Based on Metrigy's CX research, this ebook shares insights on how healthcare organizations are advancing patient engagement, with practical examples from healthcare clinics, family practices, and outpatient services.

1		Scheduling, rescheduling, or confirming appointments
2		Symptom or medical concerns (which may result in an appointment being scheduled)
3		Medication and prescription questions/refill requests
4		Inquiries about test, lab, or imaging results
5		Insurance and billing questions/issues
6		Referral to another medical provider
7		Question about follow-up care or pre-procedure prep
8		Additional information for provider
9		Occupational/employer or school-related requests
10		General information about what services are offered, directions, help with access to patient portal, answering questions/resolving issues with online pre-registration, etc.

Transforming the Patient Experience



To advance the state of patient experience, healthcare organizations must adopt a transformation mindset. Many have done so, according to Metrigy's research:

41% have completed at least one transformation project and have more underway or planned

30% are underway with their initial project

Projects fall into three areas:

Foundational



67%

Improving CX security

64%

Integrating contact center with other platforms

Apps & channels



64%

AI agents

56%

Analytics capabilities

Worker-focused



69%

AI-powered training

51%

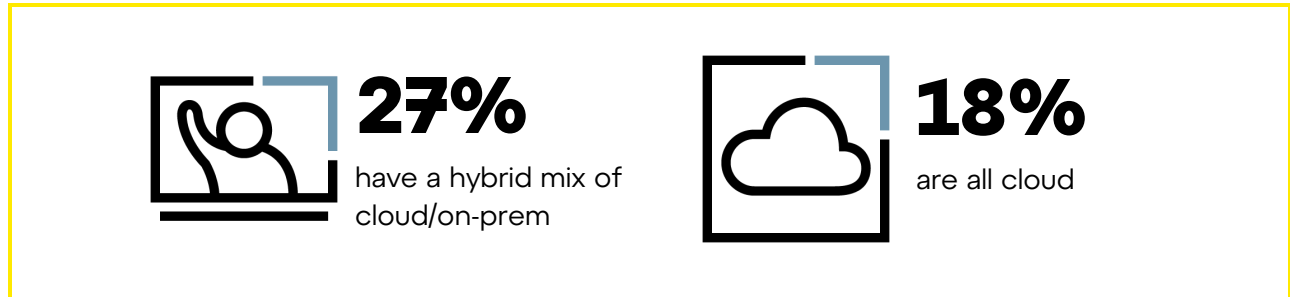
Automating scheduling

PRACTICAL EXAMPLE FOR SMALLER PRACTITIONERS

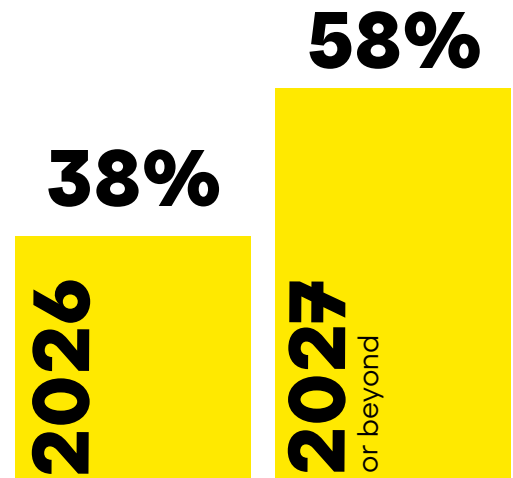
Transforming the patient experience isn't just for massive hospital systems with million-dollar-plus budgets. By focusing on transformational projects, smaller healthcare organizations can thrive, as well. For example, **a primary care practice can analyze historical no-show data to predict which slots are likely to go empty and proactively send extra reminders or offer those spots to patients on a waitlist.**

Head to the Cloud to Reduce Technical Pain Points, Gain Agility

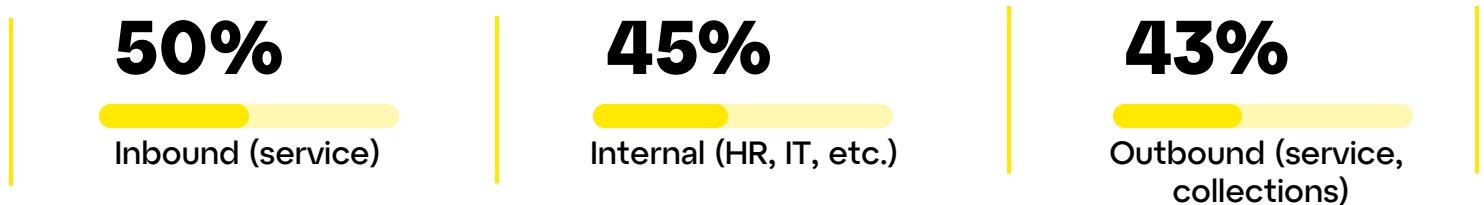
By implementing a cloud contact center platform, healthcare organizations can reduce the technical burden of maintaining an on-premises contact center system while increasing agility and easing enablement of new features and functionality. A significant percentage of healthcare organizations have already made or plan to make the move to the cloud to support patient communications:



Now, healthcare organizations are at a turning point on cloud adoption. Hampered by legacy architecture as they look to adopt AI, **most will move fully or partially to cloud as early as 2026** (only 4% say they'll never make the transition).



Healthcare organizations operate a wide array of contact centers (and a cloud platform can support any). This includes:



PRACTICAL EXAMPLE FOR SMALLER PRACTITIONERS

A sudden flu outbreak or a local health scare quadruples call volume for a local urgent care facility in a single afternoon. **A cloud-based platform allows the facility to spin up capacity as needed in real-time, releasing it after call volume subsides.** Additionally, the facility might enable a cloud-supported callback feature, allowing a patient to hang up, keep their place in the queue, and receive a call back when an agent is free. These keep patients from calling a competitive facility.

Unifying the Care Journey

Integrating communication platforms with EHR and scheduling systems eliminates the need for staff to switch between multiple tools. This streamlined workflow reduces errors, shortens response times, and lets clinicians focus on patient care—making strong integrations a key priority for healthcare organizations.

85%

see value in a single, unified platform for CX and AI capabilities

64%

cite integrating the contact center with other platforms as a top foundational transformation project

61%

currently integrate their contact center with a customer relationship management system to centralize patient data

50%

attribute a drop in their patient service to a lack of platform integration

Additionally, seamlessly connecting administrative staff (scheduling/billing) with clinical teams (triage/nurses) is essential for patient safety and operational speed:

59%

describe connecting front- and back-office functions as “Vital”

39%

have integrated unified communications (UC) and contact center platforms, **43%** planning to do so

Top 3 values in integrating UC and contact centers:

1

Brings collaboration tools to the contact center

2

Cost savings/bundled pricing

3

Enables front- and back-office communication within a single app

PRACTICAL EXAMPLE FOR SMALLER PRACTITIONERS

A multi-location urgent care organization integrates their EHR directly with their cloud contact center software. **Now, when a patient calls, the system recognizes the phone number and executes a "screen pop" within the agent's browser.** Before answering, the agent sees the patient's name, upcoming appointments, and outstanding billing status. This eliminates the 30-45 seconds usually spent asking "Can you spell your last name?" and allows the staff to immediately say, "Hello Sarah, are you calling about your follow-up for Tuesday?" This creates a personalized, efficient experience that rivals large hospital systems. Additionally, call notes auto-upload to the EHR, eliminating room for error and ensuring completeness of records for the patient's next call.

Solving the Staffing Crisis with AI

Staffing shortages and turnover are among the most prevalent challenges facing the healthcare industry. Multitasking demands and high call volumes lead to ongoing burnout, making it difficult for healthcare organizations to maintain effective teams. AI offers a solution not by replacing humans, but by supporting them.



85%

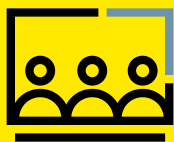
report that AI agents and human agents are working together to serve customers



60%

report improved employee efficiency as a direct benefit of AI

59%



use AI for repetitive training during onboarding

~25%



reduction in agent onboarding time thanks to AI

PRACTICAL EXAMPLE FOR SMALLER PRACTITIONERS

A high-volume primary care practice uses an AI-powered agent assist tool that listens to patient calls in real-time. **Instead of the receptionist having to memorize hundreds of insurance codes or scheduling protocols, the AI suggests the correct response or action on their screen instantly.** This reduces stress for new hires and ensures accurate information is given to patients without needing to put them on hold to ask a supervisor.

Reducing No-Shows and Revenue Leakage via Proactive Outreach

Healthcare practices are shifting from reactive to proactive outreach to reduce missed appointments, medication non-adherence, and lost refill requests—factors that affect both revenue and patient outcomes. Personalizing communication increases engagement, as patients are far more likely to respond to tailored messages than to generic mass notifications.

58%



**already use proactive outreach;
most others are planning or
considering it**

48%



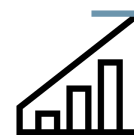
use AI to automate their outreach

44%



**use AI to personalize outreach;
nearly as many plan to start**

35%



**use analytics to determine
next-best patient for outreach;
50% plan to do so**

PRACTICAL EXAMPLE FOR SMALLER PRACTITIONERS

A medical spa utilizes proactive SMS and email reminders integrated with their scheduling platform. **Instead of a generic "You have an appointment," the system sends personalized pre-procedure instructions (e.g., "Remember to avoid sun exposure 24 hours before your laser treatment on Tuesday").** If the patient replies to cancel, the system automatically offers the slot to a patient on the waitlist, protecting the clinic's revenue.

Bridging the Patient Engagement Gap with Omnichannel

Patients are often frustrated by long phone menus and trouble reaching a live person. While voice calls are still the main way patients connect, healthcare organizations should also use digital channels for faster resolutions. Today, providers use a mix of channels, including:



64%

email

55%

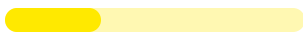
voice/phone

52%

SMS/text

Omnichannel engagement is becoming key, for seamless hand-off from one channel to another:

32%



support today; **55%** planning or evaluating

70%



have integrated 3 or 4 channels

53%



of interactions start in voice, although voice is the highest resolution rate among channels

Omnichannel solutions also help break the “phone tag” cycle—the endless voicemails and missed calls between staff and patients. With an omnichannel approach, patients can simply text a question and get a reply by text, instead of waiting for a return call. For providers, this can reduce or even eliminate the need for expensive third-party after-hours answering services.

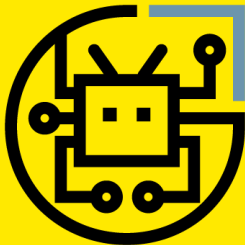
PRACTICAL EXAMPLE FOR SMALLER PRACTITIONERS

A pediatric clinic adopts an omnichannel solution designed to help them maintain compliance with healthcare regulations like HIPAA, enabling secure two-way texting from their main office number.

Parents can send photos of insurance cards or ask quick questions—such as updated hours—without clogging up the phone lines. Front desk staff can handle texts right from their computer as they check in patients, cutting down on missed calls and voicemail tag.

Ensuring Security and Compliance in a Digital-First World

Healthcare organizations face immense pressure regarding patient-related data security, HIPAA compliance, and privacy risks. Risky behaviors, such as staff texting patients from personal cell phones or using post-it notes to jot down personal health information, expose clinics to regulatory violations.



67%

are improving their CX security strategy



37%

using CX testing, monitoring, optimization tools; **56%** planning or evaluating. **Primary driver for 48%?** The need for more rigorous compliance monitoring

36%

cite security concerns as a reason they haven't moved to the cloud yet, highlighting the need to choose vendors with strong security postures, including:



HIPAA compliance



SOC 2 & 3 reporting



Call routing, analytics, etc.

PRACTICAL EXAMPLE FOR SMALLER PRACTITIONERS

A mental health practice adopts a secure mobile app for their providers. This application masks the provider's personal cell phone number when calling patients, displaying the office number instead. **All calls are logged automatically in the system for compliance auditing, ensuring no patient interaction goes undocumented and keeping personal devices distinct from professional duties.**

Recommendations for 2026 and Beyond



Move to the Cloud to Gain Agility

On-premises hardware limits your ability to deploy modern AI tools and scale during high-volume events (like flu season). If your organization is still fully on premises, evaluate a migration plan.



Leverage Proactive Outreach to Protect Revenue

Waiting for patients to call you results in administrative bottlenecks and lost revenue from no-shows. Utilize automated SMS and voice reminders for appointments and preventative care.



Integrate to Boost Productivity, Reduce Friction

Siloed systems create "swivel chair" friction that frustrates staff and slows down patient care. Integrate your contact center with your CRM or EHR to give staff immediate context; unify UC and contact center to bring back and front office together.



Start with AI to Assist Your Service Staff

You don't need to replace humans to benefit from AI. Focus on technology that helps your staff work faster and with less stress. Consider implementing AI transcription and summarization to reduce after-call work and an AI Receptionist to route calls, help out when call volume spikes, or handle calls after hours.



Prioritize Security as a Foundational Element

As patient interactions move to digital channels like SMS and email, the risk surface expands. Ensure your communications software can help you maintain your HIPAA compliance and have stringent security practices in place.

About Metrigy

Metrigy is an innovative research and advisory firm focusing on the rapidly changing areas of workplace collaboration, digital workplace, digital transformation, customer experience, and employee experience—along with several related technologies. Metrigy delivers strategic guidance and informative content, backed by primary research metrics and analysis, for technology providers and enterprise organizations.

About GoTo

GoTo, the leader in cloud communications and IT, is dedicated to powering a world of work without limits. Featuring flagship products **GoTo Connect**, **LogMeIn Resolve**, and **LogMeIn Rescue**, the GoTo portfolio offers secure, reliable, AI-enabled solutions that are simple to adopt for small and midsize businesses, and scalable to enterprises worldwide. GoTo continuously improves human experiences for AI-enabled workforces across hundreds of thousands of customers. The company is headquartered in Boston, Massachusetts, with approximately \$1 billion in annual revenue and 2,500 employees throughout North America, South America, Europe, Asia, and Australia.