

# Driving value with Agentic AI in the healthcare sector

How payers and providers are using Agentforce by Salesforce to address the challenges of a transforming industry.

August 2025





# Contents

- 03 Introduction: The gains—and potential challenges—of agentic AI
- 04 Challenges for healthcare payers: Growing membership while ensuring both efficiency and quality
- 05 Challenges for healthcare providers: Adapting to a more complex and dynamic care ecosystem
- 06 The evolution of agentic AI: What, why, how
- 07 Bringing Agentic AI online with Agentforce
  - Broker assistance
  - Sales acceleration
  - Medicare sales acceleration
  - Benefit concierge
  - Member services
  - Provider services and network management
- 09 Provider use cases
  - Prescription refill
  - Referral management
- 16 Designing your agentic AI roadmap

**INTRODUCTION**

# The gains—and potential challenge—of agentic AI

Agentic AI can deliver a transformative impact for healthcare companies.

**FOR EXAMPLE**



**FOR BROKERS AND SALES TEAMS**

Enable a faster, better-targeted sales cycle while delivering performance insights and areas for improvement.



**FOR MEMBERS AND PATIENTS**

Respond quickly and accurately to common member inquiries and requests, and remind patients of their care goals and tasks.



**FOR OPERATIONS AND SERVICE TEAMS**

Automate and assisting in sales operations, underwriting, and benefits work, while easing physician service workload.



**FOR PROVIDERS AND STAFF**

Generate clinical summaries, improve clinical decision-making, and automate high-volume tasks.

But success isn't guaranteed. There may be endless options for agentic AI deployment, but not all of them justify the implementation and consumption costs. Choose wrong, and opportunity cost can also become a factor.

Even payers and providers that identify the right use cases can face barriers to scaling, from lack of alignment on targeted outcomes to data quality and accessibility issues. User adoption challenges can undermine value realization, while high demand poses its own capability and capacity problems. It's all too easy to burn through resources without making a meaningful business impact.

To help ensure a strong return on your investment, you should think strategically about use cases and metrics, set clear priorities, and develop a sound project roadmap.

**IN THIS EBOOK, WE'LL EXPLORE**

- Healthcare industry trends and challenges driving the need for agentic AI
- High-value agentic AI use cases for payers and providers
- Implementing agentic AI with Agentforce by Salesforce
- How to begin your agentic journey



# Challenges for healthcare payers: Growing membership while maintaining efficiency and quality

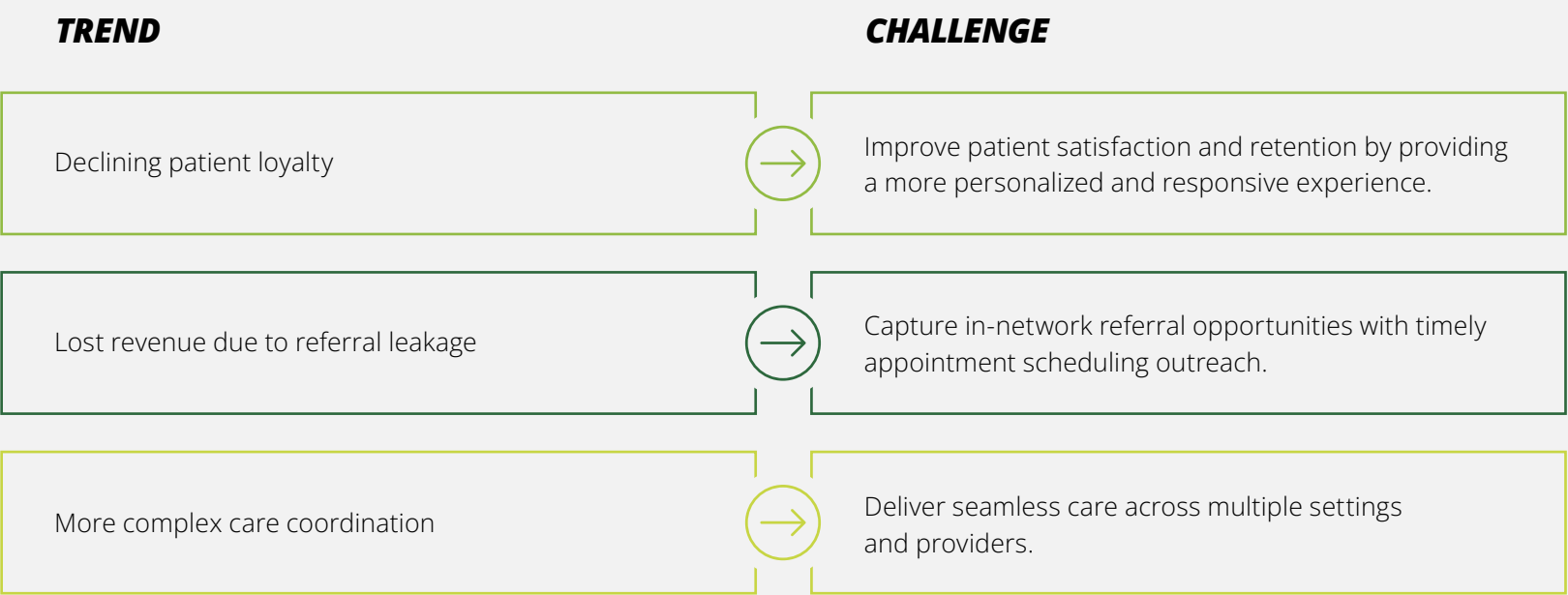
As consumers increasingly turn to a wider range of healthcare options, healthcare payers are struggling to enroll new members and deliver high-quality experiences while controlling costs.

| TREND                              |   | CHALLENGE                                                                                                  |
|------------------------------------|---|------------------------------------------------------------------------------------------------------------|
| Increasing competition for members | → | Identify marketing targets and qualify leads more effectively.                                             |
| Longer sales cycles                | → | Convert leads more quickly with health plans tailored to individual customer needs.                        |
| Rising member expectations         | → | Deliver high levels of member satisfaction and retention amid increased call volumes and support requests. |
| Inefficient provider engagement    | → | Modernize and automate outdated business processes while gathering high-quality provider interaction data. |



# Challenges for healthcare providers: Adapting to a more complex and dynamic care ecosystem

Today's healthcare providers report unprecedented levels of burnout—and no wonder. Patients are demanding more, while the care they receive is becoming more complex. Meanwhile, operational inefficiencies add friction to their work.



# The evolution of Agentic AI: What, why, how

Generative AI is tremendously versatile. Powered by LLMs incorporating both public datasets and proprietary sources, GenAI can synthesize data and create a broad range of content in response to natural language prompts. This makes it a fit for increasingly complex use cases, from creating personalized treatment plans and provider recommendations to responding promptly to patient inquiries.

In another sense, however, GenAI’s abilities are limited. It can only offer information—not make decisions or take action.

**AGENTIC AI TAKES THE NEXT STEPS. IT CAN:**

- Act autonomously to achieve specific goals
- Make decisions
- Interact with corporate and external applications to execute multistep processes

**PROVIDER**

- Prescription refills:**  
Verify status and autofill eligibility, reducing delays and improving medication adherence.
- Referral management:**  
Capture referral opportunities with timely outreach and scheduling.

**PAYER**

- Broker assistance**  
Handle higher call volumes while freeing reps to focus on sales.
- Sales acceleration**  
Provide optimized plan recommendations with less administrative dependency.
- Medicare sales acceleration**  
Identify and serve eligible populations more efficiently.
- Benefit concierge**  
Reduce turnaround time for plan configuration approvals.
- Member services**  
Provide prompt automated responses to common inquiries, boosting member satisfaction.
- Provider services and network management**  
Add, retain, and support qualified providers more effectively.



# Bringing Agentic AI online with Agentforce

Healthcare organizations getting started with agentic AI need simple, well-defined ways to deploy and scale agents for high-value use cases.

Agentforce is a low-code platform that layers Agentic AI capabilities onto the Salesforce ecosystem, making it easy to leverage your existing Salesforce investment and customer data to power agents for a growing number of roles.

**AGENTFORCE AGENTS CAN BE:**

- **Assistive**, working alongside humans as intelligent copilots to improve efficiency, productivity, and effectiveness.
- **Autonomous**, operating independently within guardrails whenever possible and escalating tasks to humans as needed.

[\*\*LEARN MORE\*\* about agentforce and the growing roster of prebuilt agentforce agents](#)



**AGENTFORCE FOR HEALTHCARE PROVIDES OUT-OF-THE-BOX AGENTS WITH SKILLS THAT CAN BE PUT TO WORK QUICKLY IN A BROAD SPECTRUM OF ROLES, INCLUDING:**



**CONTACT CENTER ASSISTANT**

Helps contact center teams efficiently handle patient queries and register new patients directly in EMR systems, without toggling across multiple applications.



**DISEASE SURVEILLANCE AGENT**

Converts lab reports into accurately classified cases; enriches public health data with real-time insights; and strengthens community engagement through automated assessments, contact tracing, and proactive outreach.



**HOME CARE ASSISTANT**

Streamlines referrals for post-acute and aged care at home, helps care coordinators understand patient needs, and provides personalized service recommendations and price quotes.



**PATIENT AND MEMBER SERVICES AGENT**

Helps patients find the right providers based on their symptoms, plans, locations, and preferences, and assists with appointment management.





## PAYER USE CASE:

# Broker assistance

### CHALLENGE

High-volume broker requests, inquiries, and performance monitoring can overwhelm call centers that have their hands full with sales calls, leading to inefficiencies and strained professional relationships.

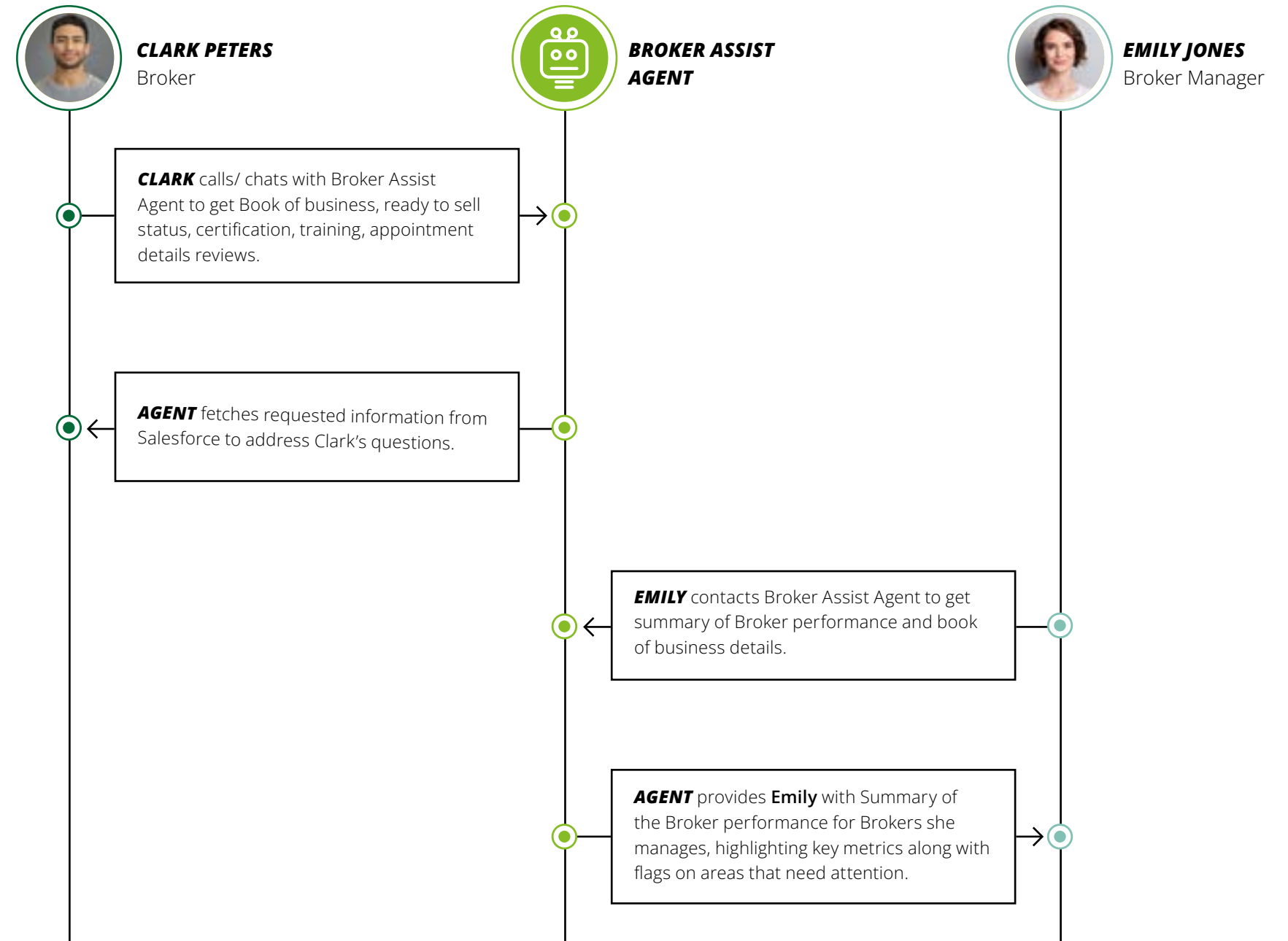
### AGENTIC SOLUTION

Brokers can interact with AI agents to handle simple inquiries and verify book-of-business details. Broker managers can access summarized performance insights derived from sales and interaction data.

### VALUE

Payers can handle higher call and query volumes without increasing staff, while sales reps and brokers are freed to focus on sales and closing.

## ILLUSTRATIVE INTERACTION FLOW WITH AN AGENT FOR BROKER ASSISTANCE







## PAYER USE CASE:

# Commercial sales acceleration

### CHALLENGE

To improve customer satisfaction and overall sales performance, brokers need to identify and recommend health plans tailored to individual customer needs.

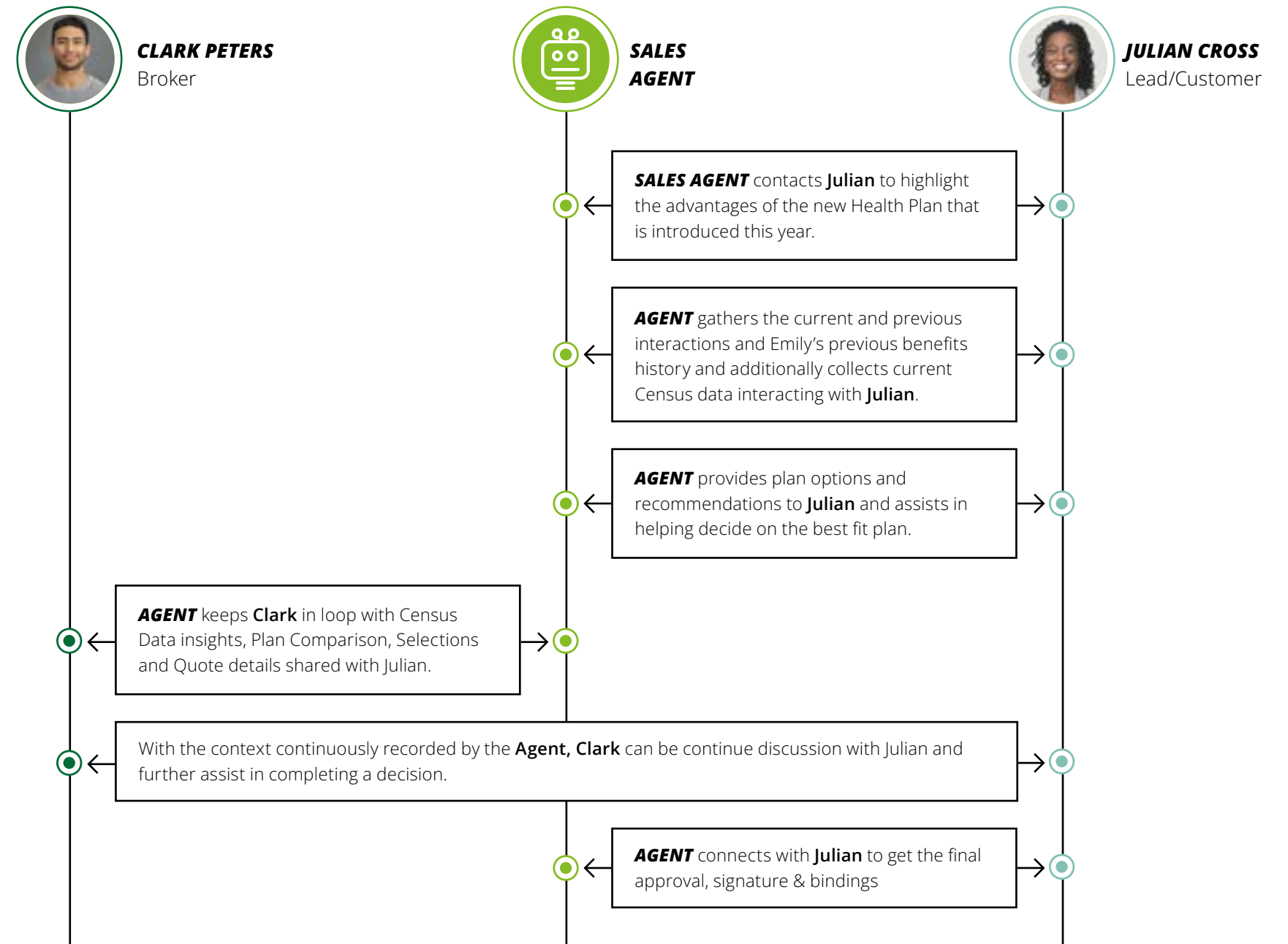
### AGENTIC SOLUTION

An Agentic AI-powered quote-to-card solution can provide lead eligibility and demographic updates, personalized plan recommendations, provider suggestions, accurate quotes, and fast responses to broker queries.

### VALUE

With a reduced need for administrative support, brokers can more easily target the right customers in the right way while improving sales through a better customer experience.

## ILLUSTRATIVE INTERACTION FLOW WITH AN AGENT FOR SALES ACCELERATION





## PAYER USE CASE:

# Medicare sales acceleration

### CHALLENGE

To sustain growth and competitiveness in the evolving Medicare market, payers need to drive customer retention while ensuring streamlined, cost-effective member assessment and enrollment.

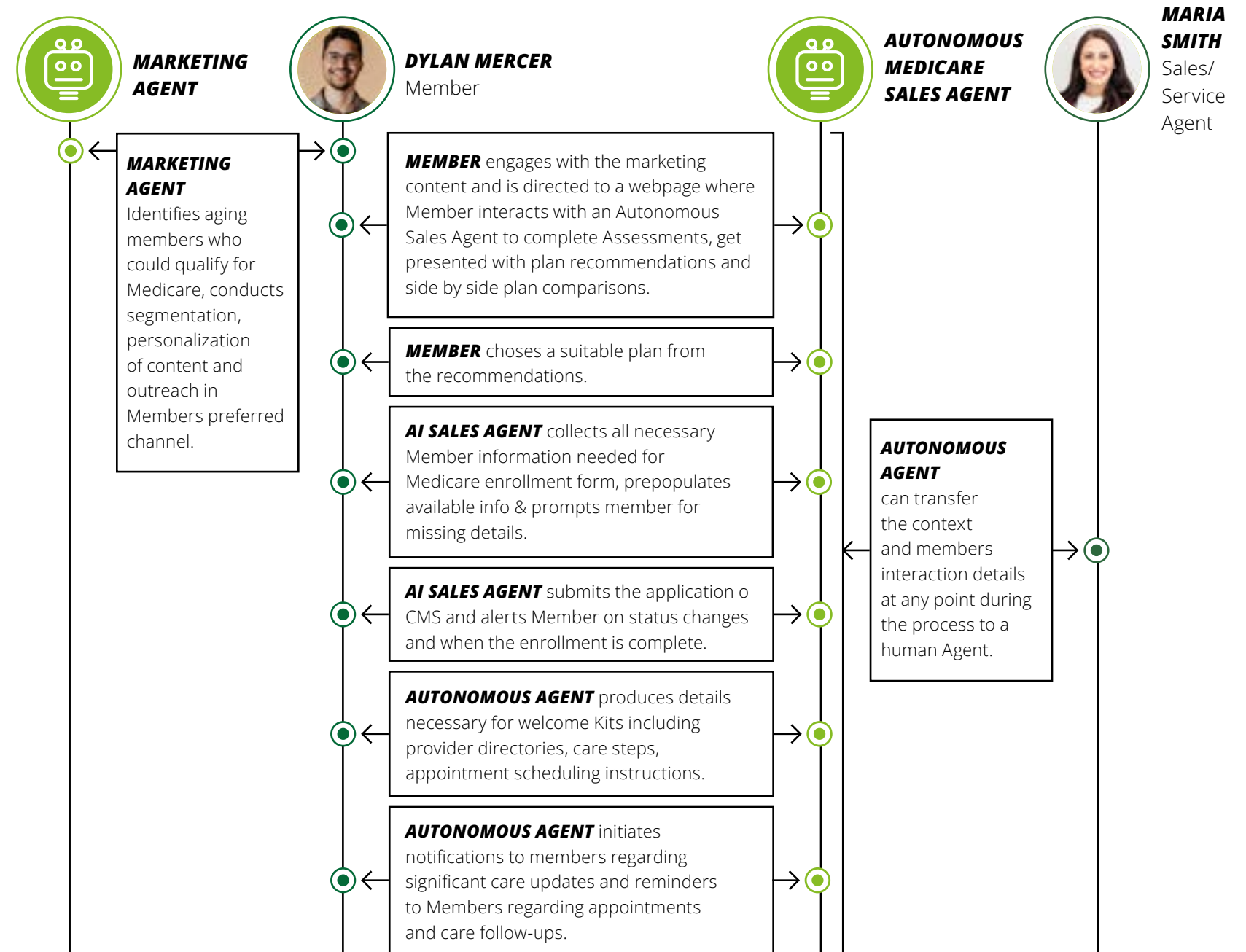
### AGENTIC SOLUTION

Autonomous AI agents can identify eligible populations, deliver personalized plan recommendations, facilitate chat-based assessments, help with enrollment form completion, and provide engaging onboarding support with less dependence on human agents.

### VALUE

Sales agents can spend less time resolving common inquiries and focus on driving sales with prompt, accurate plan recommendations.

## ILLUSTRATIVE INTERACTION FLOW WITH AN AGENT FOR MEDICARE SALES ACCELERATION





## PAYER USE CASE:

# Benefit concierge

### CHALLENGE

In large-group commercial healthcare renewals, plan customization spans multiple systems and personnel. Without visibility into product rules, account managers can create plan configurations that require additional approvals—significantly extending turnaround time.

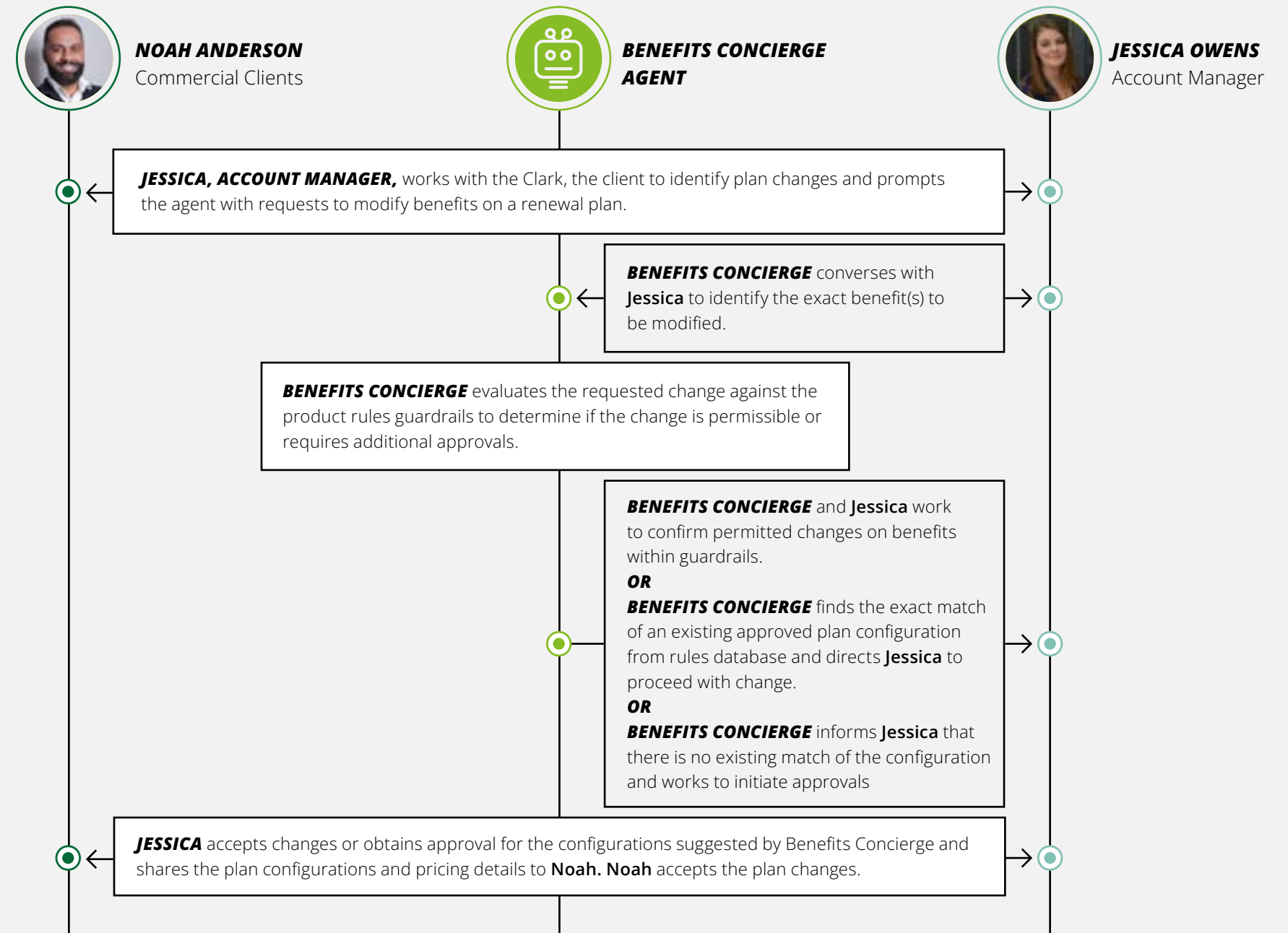
### AGENTIC SOLUTION

An AI agent can help identify specific benefits and determine whether a plan change is permitted within guardrails. If not, the agent can initiate approvals for a net-new plan customization.

### VALUE

Account managers can respond more quickly to plan configuration requests, reducing renewal turnaround time.

## ILLUSTRATIVE INTERACTION FLOW WITH AN AGENT FOR BENEFIT CONCIERGE





## PAYER USE CASE:

# Member services

### CHALLENGE

High-volume calls on topics such as member demographic changes, benefits verification, plan changes, and primary care provider (PCP) updates often combine extensive human interaction at multiple touchpoints with execution of systemic rules. Time-consuming, error-prone manual processes can reduce customer satisfaction and increase costs.

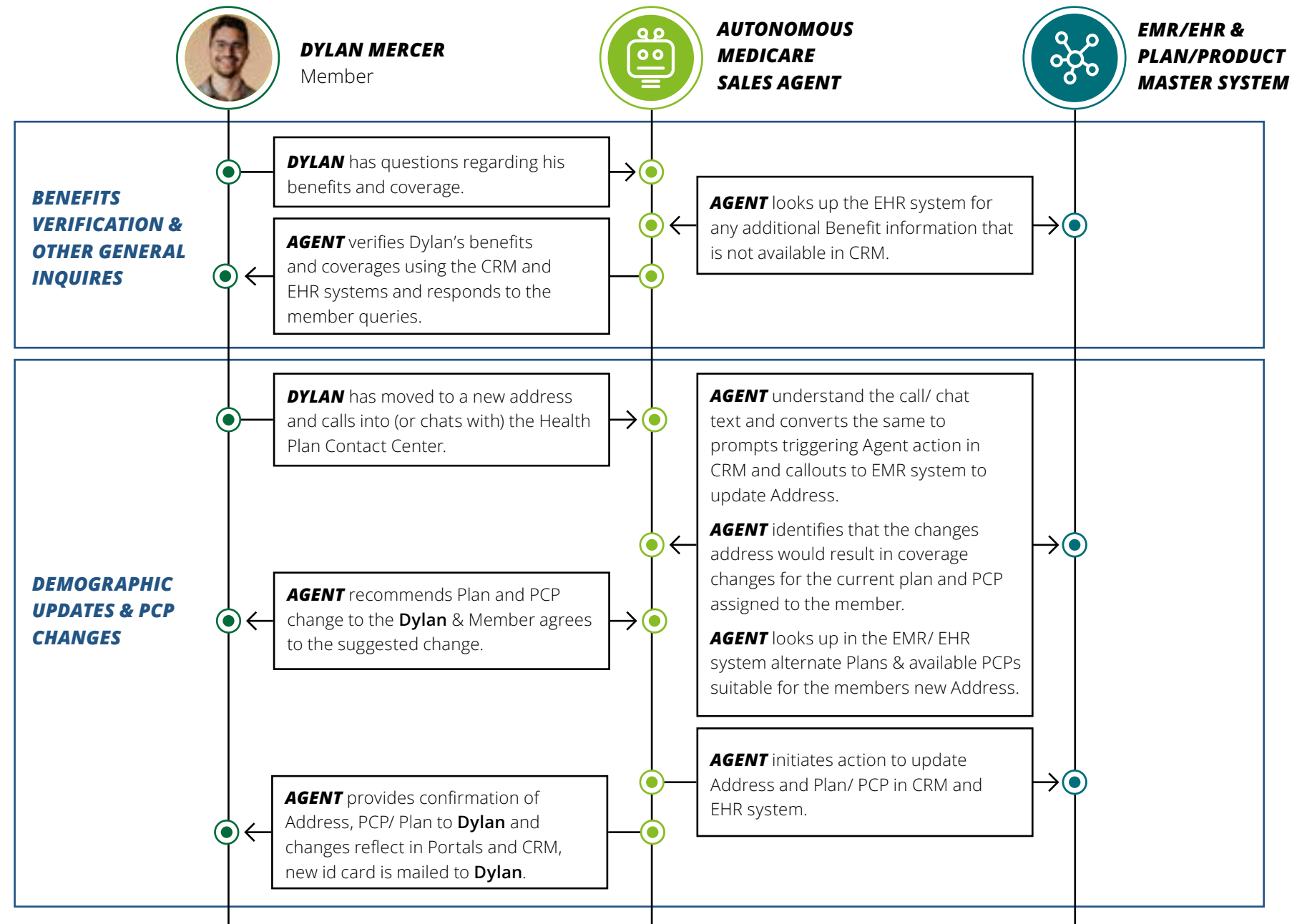
### AGENTIC SOLUTION

Autonomous agents can handle calls and chats related to benefits, coverages, and cost of care, and use call notes or text as prompts to carry out member demographic updates. Assistive agents can suggest optimal PCP and plan options for members based on current health and location.

### VALUE

Prompt resolution of common member inquiries improves loyalty and satisfaction. Copilot AI agents can reduce repeated tasks and lookups, enabling service reps to focus on interactions requiring human attention.

## ILLUSTRATIVE INTERACTION FLOW WITH AN AGENT FOR MEMBER SERVICES







## PAYER USE CASE:

# Provider services and network management

### CHALLENGE

For payers with robust and diverse provider networks, effective management and servicing are critical to help reduce cycle times and costs, foster strong provider relationships, and enhance patient care quality.

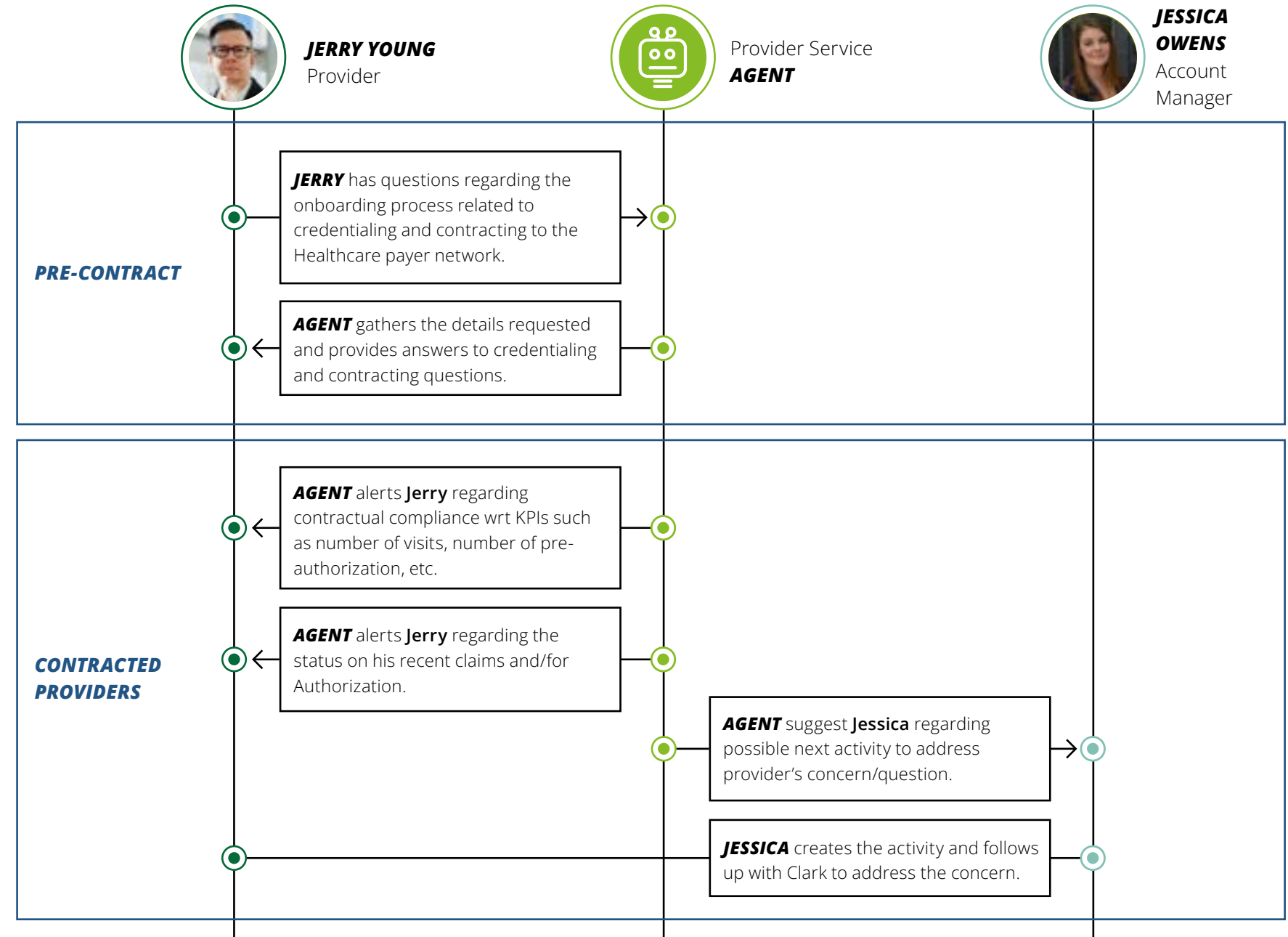
### AGENTIC SOLUTION

Autonomous agents can answer common questions, guide providers to complete onboarding and contracting processes, and verify compliance with contractual obligations. Assistive agents can research claims and authorization status, summarize provider details and interactions, and suggest next steps for provider engagement.

### VALUE

Payers can add qualified providers to the network more easily, strengthen retention, and support providers more effectively, while improving member health outcomes.

## ILLUSTRATIVE INTERACTION FLOW WITH AN AGENT FOR PROVIDER SERVICES AND NETWORK MANAGEMENT





## PAYER USE CASE:

# Prescription refill

### CHALLENGE

Prescription refill requests can take up an inordinate amount of providers' time, increasing the likelihood of delays and missed doses. The problem is compounded by fragmented communication channels, lack of integration between electronic health record (EHR) and pharmacy management systems, and insufficient automation of refill approvals.

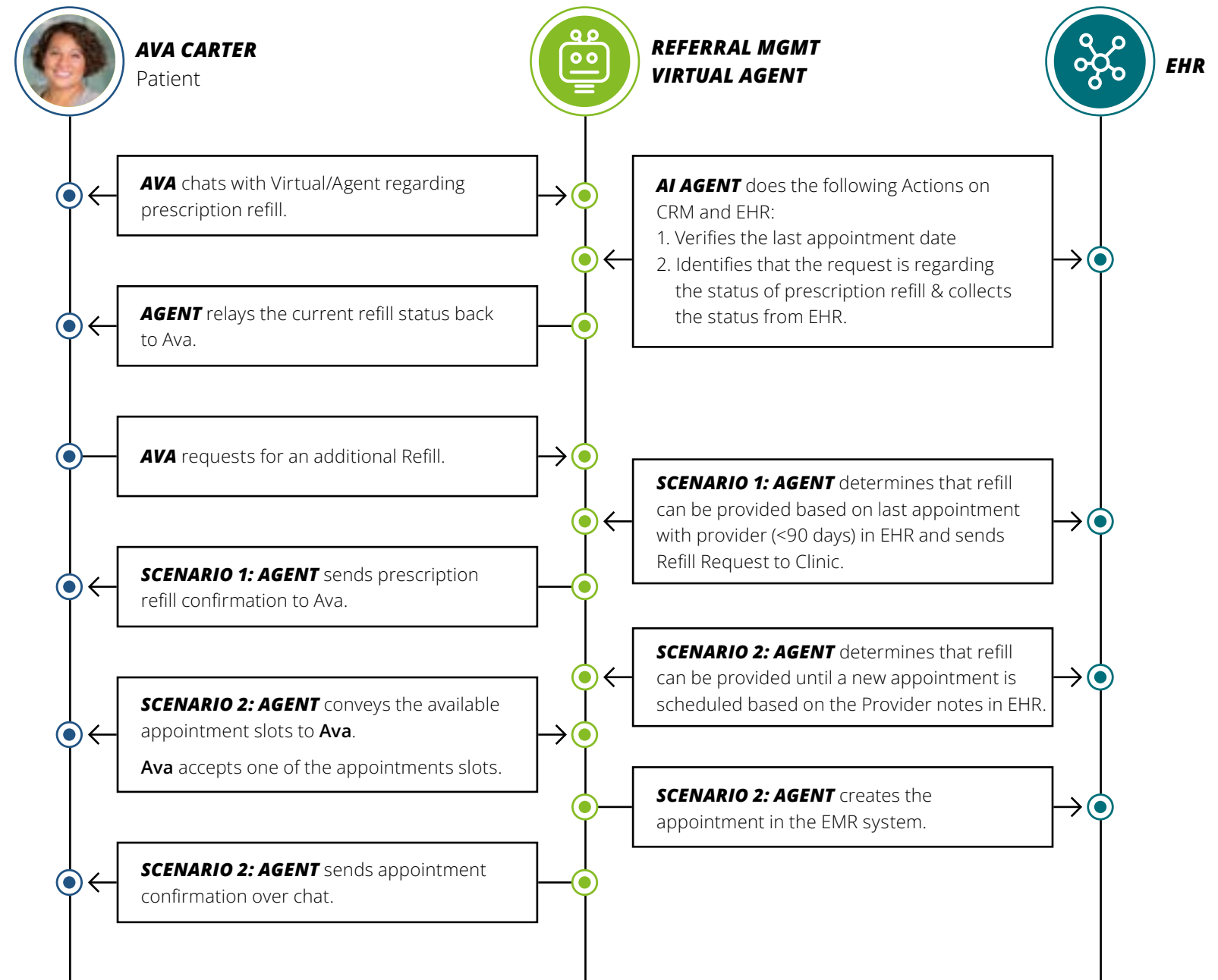
### AGENTIC SOLUTION

An agent can review a refill request, verify prescription and appointment dates to determine whether a new prescription is needed, scan EHR data and provider notes to determine autofill eligibility, submit requests to the pharmacy on the provider's behalf, and inform the patient of refill status.

### VALUE

Prompt refills improve provider-patient relationships and support prescription adherence. Automated tasks free office staff to focus on human interaction.

## ILLUSTRATIVE INTERACTION FLOW WITH AN AGENT FOR PRESCRIPTION REFILL





## CHALLENGE

## AGENTIC SOLUTION

**VALUE**

Timely automated outreach and scheduling for referred patients improves in-network retention and overall revenue.

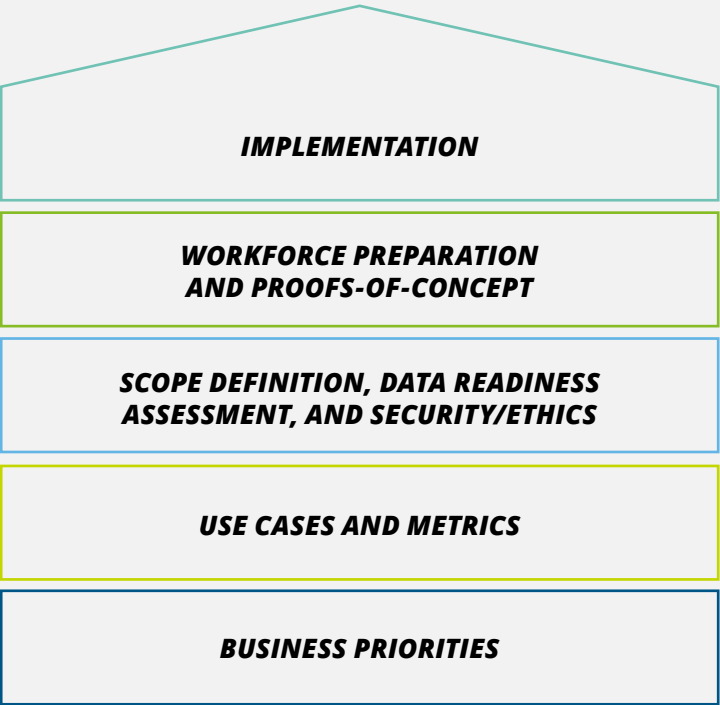
```

graph TD
    subgraph TopRow [ ]
        direction LR
        P1((MAYA CLARK  
Referring Provider))
        P2((AVA CARTER  
Patient))
        P3((salesforce  
CRM SYSTEM))
        P4((REFERRAL MGMT  
VIRTUAL AGENT))
        P5((EMR/  
APPOINTMENT  
MANAGEMENT SYSTEM))
    end

    P1 --> B1(( ))
    B1 --> B2(( ))
    B2 --> B3(( ))
    B3 --> B4(( ))
    B4 --> B5(( ))
    B5 --> B6(( ))
    B6 --> B7(( ))
    B7 --> B8(( ))
    B8 --> B9(( ))
    B9 --> B10(( ))
    B10 --> B11(( ))
    B11 --> B12(( ))
    B12 --> B13(( ))
    B13 --> B14(( ))
    B14 --> B15(( ))
    B15 --> B16(( ))
    B16 --> B17(( ))
    B17 --> B18(( ))
    B18 --> B19(( ))
    B19 --> B20(( ))
    B20 --> B21(( ))
    B21 --> B22(( ))
    B22 --> B23(( ))
    B23 --> B24(( ))
    B24 --> B25(( ))
    B25 --> B26(( ))
    B26 --> B27(( ))
    B27 --> B28(( ))
    B28 --> B29(( ))
    B29 --> B30(( ))
    B30 --> B31(( ))
    B31 --> B32(( ))
    B32 --> B33(( ))
    B33 --> B34(( ))
    B34 --> B35(( ))
    B35 --> B36(( ))
    B36 --> B37(( ))
    B37 --> B38(( ))
    B38 --> B39(( ))
    B39 --> B40(( ))
    B40 --> B41(( ))
    B41 --> B42(( ))
    B42 --> B43(( ))
    B43 --> B44(( ))
    B44 --> B45(( ))
    B45 --> B46(( ))
    B46 --> B47(( ))
    B47 --> B48(( ))
    B48 --> B49(( ))
    B49 --> B50(( ))
    B50 --> B51(( ))
    B51 --> B52(( ))
    B52 --> B53(( ))
    B53 --> B54(( ))
    B54 --> B55(( ))
    B55 --> B56(( ))
    B56 --> B57(( ))
    B57 --> B58(( ))
    B58 --> B59(( ))
    B59 --> B60(( ))
    B60 --> B61(( ))
    B61 --> B62(( ))
    B62 --> B63(( ))
    B63 --> B64(( ))
    B64 --> B65(( ))
    B65 --> B66(( ))
    B66 --> B67(( ))
    B67 --> B68(( ))
    B68 --> B69(( ))
    B69 --> B70(( ))
    B70 --> B71(( ))
    B71 --> B72(( ))
    B72 --> B73(( ))
    B73 --> B74(( ))
    B74 --> B75(( ))
    B75 --> B76(( ))
    B76 --> B77(( ))
    B77 --> B78(( ))
    B78 --> B79(( ))
    B79 --> B80(( ))
    B80 --> B81(( ))
    B81 --> B82(( ))
    B82 --> B83(( ))
    B83 --> B84(( ))
    B84 --> B85(( ))
    B85 --> B86(( ))
    B86 --> B87(( ))
    B87 --> B88(( ))
    B88 --> B89(( ))
    B89 --> B90(( ))
    B90 --> B91(( ))
    B91 --> B92(( ))
    B92 --> B93(( ))
    B93 --> B94(( ))
    B94 --> B95(( ))
    B95 --> B96(( ))
    B96 --> B97(( ))
    B97 --> B98(( ))
    B98 --> B99(( ))
    B99 --> B100(( ))
    B100 --> B101(( ))
    B101 --> B102(( ))
    B102 --> B103(( ))
    B103 --> B104(( ))
    B104 --> B105(( ))
    B105 --> B106(( ))
    B106 --> B107(( ))
    B107 --> B108(( ))
    B108 --> B109(( ))
    B109 --> B110(( ))
    B110 --> B111(( ))
    B111 --> B112(( ))
    B112 --> B113(( ))
    B113 --> B114(( ))
    B114 --> B115(( ))
    B115 --> B116(( ))
    B116 --> B117(( ))
    B117 --> B118(( ))
    B118 --> B119(( ))
    B119 --> B120(( ))
    B120 --> B121(( ))
    B121 --> B122(( ))
    B122 --> B123(( ))
    B123 --> B124(( ))
    B124 --> B125(( ))
    B125 --> B126(( ))
    B126 --> B127(( ))
    B127 --> B128(( ))
    B128 --> B129(( ))
    B129 --> B130(( ))
    B130 --> B131(( ))
    B131 --> B132(( ))
    B132 --> B133(( ))
    B133 --> B134(( ))
    B134 --> B135(( ))
    B135 --> B136(( ))
    B136 --> B137(( ))
    B137 --> B138(( ))
    B138 --> B139(( ))
    B139 --> B140(( ))
    B140 --> B141(( ))
    B141 --> B142(( ))
    B142 --> B143(( ))
    B143 --> B144(( ))
    B144 --> B145(( ))
    B145 --> B146(( ))
    B146 --> B147(( ))
    B147 --> B148(( ))
    B148 --> B149(( ))
    B149 --> B150(( ))
    B150 --> B151(( ))
    B151 --> B152(( ))
    B152 --> B153(( ))
    B153 --> B154(( ))
    B154 --> B155(( ))
    B155 --> B156(( ))
    B156 --> B157(( ))
    B157 --> B158(( ))
    B158 --> B159(( ))
    B159 --> B160(( ))
    B160 --> B161(( ))
    B161 --> B162(( ))
    B162 --> B163(( ))
    B163 --> B164(( ))
    B164 --> B165(( ))
    B165 --> B166(( ))
    B166 --> B167(( ))
    B167 --> B168(( ))
    B168 --> B169(( ))
    B169 --> B170(( ))
    B170 --> B171(( ))
    B171 --> B172(( ))
    B172 --> B173(( ))
    B173 --> B174(( ))
    B174 --> B175(( ))
    B175 --> B176(( ))
    B176 --> B177(( ))
    B177 --> B178(( ))
    B178 --> B179(( ))
    B179 --> B180(( ))
    B180 --> B181(( ))
    B181 --> B182(( ))
    B182 --> B183(( ))
    B183 --> B184(( ))
    B184 --> B185(( ))
    B185 --> B186(( ))
    B186 --> B187(( ))
    B187 --> B188(( ))
    B188 --> B189(( ))
    B189 --> B190(( ))
    B190 --> B191(( ))
    B191 --> B192(( ))
    B192 --> B193(( ))
    B193 --> B194(( ))
    B194 --> B195(( ))
    B195 --> B196(( ))
    B196 --> B197(( ))
    B197 --> B198(( ))
    B198 --> B199(( ))
    B199 --> B200(( ))
    B200 --> B201(( ))
    B201 --> B202(( ))
    B202 --> B203(( ))
    B203 --> B204(( ))
    B204 --> B205(( ))
    B205 --> B206(( ))
    B206 --> B207(( ))
    B207 --> B208(( ))
    B208 --> B209(( ))
    B209 --> B210(( ))
    B210 --> B211(( ))
    B211 --> B212(( ))
    B212 --> B213(( ))
    B213 --> B214(( ))
    B214 --> B215(( ))
    B215 --> B216(( ))
    B216 --> B217(( ))
    B217 --> B218(( ))
    B218 --> B219(( ))
    B219 --> B220(( ))
    B220 --> B221(( ))
    B221 --> B222(( ))
    B222 --> B223(( ))
    B223 --> B224(( ))
    B224 --> B225(( ))
    B225 --> B226(( ))
    B226 --> B227(( ))
    B227 --> B228(( ))
    B228 --> B229(( ))
    B229 --> B230(( ))
    B230 --> B231(( ))
    B231 --> B232(( ))
    B232 --> B233(( ))
    B233 --> B234(( ))
    B234 --> B235(( ))
    B235 --> B236(( ))
    B236 --> B237(( ))
    B237 --> B238(( ))
    B238 --> B239(( ))
    B239 --> B240(( ))
    B240 --> B241(( ))
    B241 --> B242(( ))
    B242 --> B243(( ))
    B243 --> B244(( ))
    B244 --> B245(( ))
    B245 --> B246(( ))
    B246 --> B247(( ))
    B247 --> B248(( ))
    B248 --> B249(( ))
    B249 --> B250(( ))
    B250 --> B251(( ))
    B251 --> B252(( ))
    B252 --> B253(( ))
    B253 --> B254(( ))
    B254 --> B255(( ))
    B255 -->
```

# Designing your Agentic AI road map

Agentforce is a powerful and versatile toolkit for implementing agentic AI—but a tool is only as valuable as the blueprint guiding its use. As you begin your agentic AI journey, understanding where to focus to realize the most value for your organization is critical. You should also assess how Agentforce fits into the broader architectural landscape, including compatibility with current data management systems and ability to scale and adapt over time.



**Deloitte Digital:**  
**Working with you to deliver agentic transformation**

Deloitte Digital helps organizations use agentic AI and Agentforce to see further and get there faster. We collaborate with clients every step of the way, from finding and quantifying value opportunities across the enterprise to building and launching agents in production, tracking value realization, and scaling solutions across functions.

Deloitte Digital clients in a broad range of industries are already driving business impact with agentic AI. Begin your journey now, and maximize the value of the agentic revolution for your organization.

**LEARN MORE** about Agentic AI with [Deloitte Digital and Agentforce by Salesforce](#).

**WE CAN WORK WITH YOU TO:**

- **Set your vision.** Define your future state, including anticipated workforce needs, to identify the right agents and use cases for your initiative.
- **Build a data foundation.** Assess, collect, and cleanse the data needed to train and fine-tune your agents, now and in the future.
- **Prepare your workforce.** Deliver employee-focused programs to infuse the knowledge and cultural shifts that help teams buy into and make full use of agentic AI.
- **Accelerate time to value.** Quickly unlock value from AI with [Agent Advantage™ for Salesforce](#), our library of prebuilt industry-specific agents.
- **Deploy proofs of concept.** Deploy agents into current processes and business structures and demonstrate ROI to stakeholders.







## **GET IN TOUCH**

### **Deepak Gulati**

Principal  
[degulati@deloitte.com](mailto:degulati@deloitte.com)

### **Sujon Chowdhary**

Managing Director  
[schowdhary@deloitte.com](mailto:schowdhary@deloitte.com)

### **Avik Chakrabarti**

Senior Manager  
[avchakrabarti@deloitte.com](mailto:avchakrabarti@deloitte.com)

### **Pratyush Kumar**

Managing Director  
[pratykumar@deloitte.com](mailto:pratykumar@deloitte.com)

## **About Deloitte**

As used in this document, "Deloitte" means Deloitte Consulting LLP, a subsidiary of Deloitte LLP. Please see [www.deloitte.com/us/about](http://www.deloitte.com/us/about) for a detailed description of our legal structure. Certain services may not be available to attest clients under the rules and regulations of public accounting.

This publication contains general information only and Deloitte is not, by means of this publication, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor. Deloitte shall not be responsible for any loss sustained by any person who relies on this publication.

Copyright © 2025 Deloitte Development LLC. All rights reserved.