

HealthEquity's contact center was hurting customer experience. AI fixed it and cut costs at the same time.

The Outcome

HealthEquity, a leading HSA provider, was running a legacy contact center that had become too expensive to maintain and was actively damaging customer experience. Presidio replaced it with a Google Contact Center AI platform that handles more calls through self-service, reduces agent load, and gives customers a natural-language experience instead of a touch-tone menu.

How They Got There

Presidio opened the engagement by building a no-cost demo for HealthEquity's Investor Day on a tight timeline. From there, Presidio led stakeholder workshops to map the current environment and identify the highest-impact automation opportunities. The plan addressed four problems: replacing touch-tone IVR with natural language voice, consolidating acquired applications, eliminating operational redundancies, and building a proactive AI-driven service model.

Why It Worked

Legacy contact centers fail in two directions at once: they cost too much to run and frustrate the customers they're supposed to serve. Presidio addressed both by treating AI as a replacement architecture - one that understands customer behavior well enough to get ahead of needs rather than just respond to them.

The Situation

HealthEquity's legacy contact center had become a liability on two fronts: too costly to maintain, and actively degrading the customer experience. Touch-tone IVR menus frustrated customers. Years of acquisitions had layered redundant applications on top of one another, creating inefficiency and inflated training costs.

The Approach

Presidio signaled its commitment early: building a no-cost demo for HealthEquity's Investor Day under a tight deadline. From there, Presidio led stakeholder workshops and identified the highest-impact automation opportunities. The plan tackled four problems simultaneously: replacing touch-tone IVR with natural-language voice, consolidating acquired applications, eliminating redundancies, and building a proactive AI-driven service model. Google CCAI was selected as the platform. Data privacy was treated as a design requirement throughout.

The Result

HealthEquity's contact center now routes more calls through AI-powered self-service, reducing agent load and improving the experience for customers. The natural-language system handles interactions intuitively and surfaces behavioral insights that allow HealthEquity to get ahead of common issues proactively. Redundant applications have been consolidated. Cost savings are compounding daily.

"Presidio really came in as a strategic partner and helped us align our direction and vision for AI tools. They were able to help us pick the right AI tool that would deliver the best value for our members and clients." — Jess Cloud, VP IT Operations & Digital Transformation, HealthEquity

Natural language

IVR replaced touch-tone menus - customers speak, the system understands

Compounding

Cost savings daily as redundant applications are eliminated

Proactive

AI-driven customer service model - anticipating needs, not just responding