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The Complete Guide to Behavioral Health AI Implementation

In a 2024 Eleos® survey of behavioral health leaders, more than **70%** of respondents said they planned to use artificial intelligence (AI) technology in their organizations—with about **50%** saying they planned to implement an AI solution within the next year.

Clearly, AI is top of mind in behavioral health. But while there are plenty of resources available to educate the industry on what AI is and why it's valuable, there's no comprehensive playbook for implementing it successfully. Until now.

Based on input from a variety of experts across the behavioral health industry, this guide offers a wealth of insight on best practices for implementing specialized AI technology. Read on for all the information—and inspiration—you need to lead a successful AI rollout in your behavioral health organization.

Wherever you are on the tech-forward journey, keep going.

You've got this!

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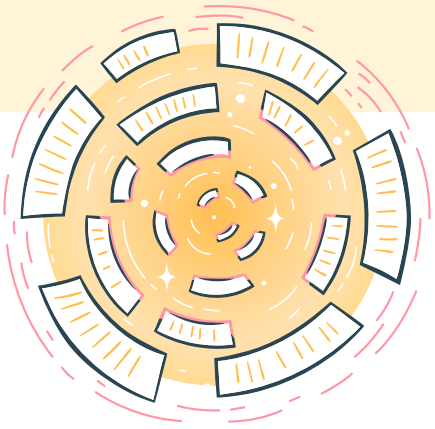
This guide will take you step-by-step through the AI tech consideration, acquisition, implementation, and optimization process.



Inspo from the Experts: Setting the Stage for a Successful AI Tech Implementation

The most important thing a behavioral health leader can do to prepare for the integration of a new AI technology is to...

...ensure and maintain a change-ready organizational culture.

Dale Klatzker, PhD
Retired CEO
Gaudenzia

...listen to their staff, what they need, and what is important to them.

Hattie Tracy
President/CEO
Coleman Health Services

...fully understand the challenges that your team faces and actively seek out technology tools that will enable them to be more efficient and productive.

Susan Blue
President/CEO
Community Services Group

...deeply understand your biggest organizational challenges and current systems.

Amanda Rankin
Customer Insights Lead
Eleos

...have a clear understanding of the desired outcome.

Josh Cantwell
COO
GRAND Mental Health

...be clear about the problem they are solving for.

Jeremy Attermann
Senior Director of Strategy & Venture
National Council for Mental Wellbeing

...understand that technology integration is a lifelong journey of twists, turns, new routes, and differing maps—not a simple trip to a single destination.

James H. Stewart
President/CEO
Grafton Integrated Health Network

Stage 1:

Gathering Data and Evaluating Your Organization's Readiness

Before you choose a behavioral health AI tool, you'll need to take a frank look at your organization's needs and resources. The following questions can help you determine how close to ready you are for behavioral health technology solutions, as well as guide you in choosing the right tool.

What are the organization's most pressing issues?

Are staff retention, documentation, or improving outcomes top priorities for your organization? Are you currently implementing new initiatives or projects that could benefit from an AI tool? Do you have other pressing challenges that AI could potentially address?

What stakeholders need to be consulted and included in the technology planning process?

To ensure the success and effectiveness of any tech implementation, it's important to gather input and feedback from all potential stakeholders. This includes providers, administrators, advisory boards, clients, community members, and other key players in the organization.

What's our budget?

Ask yourself how much solving your most pressing issues is worth—and how much you're already spending to fix those issues. Keep in mind that tech tools tend to reduce expenditures in certain budget areas, and consider the cost of not making any changes.

What other resources do we need?

Consider what additional resources may be needed beyond the technology itself. This may include updated hardware, such as computers, or tech support personnel and advisors who can assist with the planning and execution process.

How comfortable are our providers with technology?

If your clinicians aren't tech-savvy, it might be helpful to take things slow when introducing new technology like AI. Introducing the technology well in advance of the go-live date—and providing plenty of training, support, and opportunities for feedback along the way—can help staff get used to the tool and build up their confidence. This way, they'll be more likely to use the technology effectively and feel comfortable with it in the long run.

What population-specific factors should be considered?

Evaluate the population you serve for things like language fluency, literacy levels, and technology proficiency. It's important to ensure clients are comfortable with any technology that may be used during their care—and that your organization is equipped to answer client questions accurately and confidently.

Gearing Up: Expert Tips for Assessing AI Tech Readiness

Evaluate your tech stack.

"If your organization's technological framework is outdated or inadequate, the new tools will not overcome that, and your implementation and use will be suboptimal. My organization needed significant time to assist our technology-averse employees (those who did not regularly use technology) to adjust and adapt. Multiple avenues of support had to be established, a buddy system was helpful, and a lot of patience was required."

Dale Klatzker, PhD | Retired CEO, Gaudenzia

Consider bringing in outside experts.

"Your decisions are only as good as your existing team and their knowledge and skill set. I believe it's best to bring in outside expertise. This expertise should have a broad knowledge of the current technology landscape—both in your current industry and in the broader IT industry—so they can bring out-of-the-box ideas and information you and your team may not possess. For us, we recognized that with our budget and margins, we could not afford a state-of-the-art investment in a true CIO/CTO individual. We have chosen to contract through a third party for that expertise."

James H. Stewart | President/CEO, Grafton Integrated Health Network

Know your providers' workflows.

"Understanding clinician workflows helps you have a better idea of how this software will not only integrate with your clinicians and how they'll use it, but also how it will help you as an agency."

Kate Benedetto | Manager of Enterprise Applications, Mental Health Partners (MHP)

Get clear on your "why."

"We were really looking at what we could do to improve our staff's work-life balance and enable them to focus more on providing services to clients. They still have to do the documentation, but if there was a way to alleviate one of their biggest frustrations—that's really what I was looking for when I first came across this AI solution."

Hattie Tracy | President/CEO, Coleman Health Services

Stage 2:

Familiarizing Yourself With Your Options

To make informed decisions about technology tools, you have to be familiar with the landscape of behavioral health tech—especially when it comes to artificial intelligence (AI). Within the AI category, augmented intelligence—a flavor of AI focused on enhancing, rather than replacing, the work of human providers—is one of the most rapidly growing technologies for tech-forward organizations.

The function of technology in behavioral health is typically to automate tasks, engage patients, or support decision-making. Currently, there is AI technology on the market that can be used to:

1 | Predict mental illness.

2 | Measure symptom improvement and treatment progress.

3 | Offer feedback on therapy sessions, including monitoring fidelity.

4 | Deliver psychoeducation and skills training directly to clients.

5 | Reduce administrative burdens on clinicians.

Some AI tools fall into more than one category. Here's a handy comparison chart.

Category	Purpose	Issues Addressed	Examples
Predictive modeling and precision mental health	AI tools that can be used to estimate the possibility that a person would experience a mental health disorder.	Identifying at-risk Individuals Screening and supporting diagnosis	HealthRhythms Kintsugi
Screening and measurement-based care	These tools are used to determine and assess a client's treatment plan based on the frequency, intensity, and nature of symptoms. Furthermore, outcomes are analyzed throughout the intervention to confirm their effectiveness.	Screening and supporting diagnosis Planning treatment Monitoring treatment progress Measuring outcomes	Eleos Owl Blueprint Health
Evaluating the therapy process and supporting data-driven supervision	These tools can offer unbiased feedback on therapist intervention skills and real-world data on how clients are doing.	Planning treatment Evaluating treatment fidelity Improving supervision	Eleos Lyssn
Digitally-enabled interventions for additional psychoeducation and support	As part of a blended care model, AI-based digital therapeutics (DTx) can complement and extend therapy.	Administering treatment	Limbix Click Therapeutics
AI to streamline the therapists' work and reduce administrative burden	Using AI tools to reduce administrative workload (such as documentation) can optimize service delivery and reduce therapist burnout and churn.	Addressing burnout Streamlining administrative tasks	Eleos Bells.AI

Kellogg KC and Sadeh-Sharvit S (2022). Pragmatic AI-augmentation in mental healthcare: Key technologies, potential benefits, and real-world challenges and solutions for frontline clinicians. Front. Psychiatry 13:990370. doi: 10.3389/fpsyt.2022.990370

Sadeh-Sharvit, S., & Hollon, S. (2023, February 21). Revolutionizing Mental Healthcare Services through AI-Augmentation: A New Model. https://doi.org/10.31234/osf.io/z56yq

Stage 3:

Selecting an AI Platform

Once you've identified the type of technology best suited to support your organization, it's time to choose a product.

With more and more AI solutions entering the market, it's crucial to select your AI partner with intention. Successfully implementing and adopting an AI tool in your org hinges on choosing a vendor that truly jibes with your clinical needs, operational requirements, and compliance standards. Here, we'll run through key features and functionality to look for in an augmented intelligence platform.

Must-Have AI Features and Capabilities in Behavioral Health

1. Behavioral Health–Specific AI

Look for an AI platform that is built specifically for behavioral health, trained on specialized data inputs, and fine-tuned by clinical experts. This empowers the AI to "understand" the nuances of therapeutic conversations and deliver relevant insights.

"For any technology that leverages AI models, effectively training the models to perform with a high degree of accuracy is critical. For a model specific to behavioral health, that level of training is only possible with input from clinical experts—which is why our clinical team is a core differentiator for us at Eleos. Furthermore, the overall effectiveness of the model hinges on the quality of the data used to train it. By training our models with real-world session data, we enhance their applicability in the intended context: community-based behavioral health clinics."

Shiri Sadeh-Sharvit, PhD | Chief Clinical Officer, Eleos

2. Seamless Embedding with Existing Tech and Workflows

The AI solution you choose should align with current provider workflows and easily work in tandem with the technology you already have—especially your EHR and telehealth tools. This is where it's important to understand the technical difference between "integration" and "embedding":

- **Integration:** This traditional method of connecting tech systems requires engineers to grant permissions and update code, often incurring additional costs and extending implementation timelines.
- **Embedding:** This lightweight, versatile approach to connecting tech systems allows the new software to work alongside existing platforms immediately—without additional permissions or access codes. This method often uses browser extensions, making it quicker and more cost-effective to implement.

3. Robust Support

Look for vendors offering extensive support, including customized implementation plans, robust training, ongoing guidance, and transparent communication. Bonus points if you also receive a dedicated point of contact, as this will help streamline communication and make the transition easier.

4. Data Security and HIPAA Compliance

Double-check that the vendor adheres to HIPAA and other relevant security standards (e.g., SOC 2 and HITRUST). Focus on audit controls, privacy controls, and security measures to protect client data.

5. Customization and Adaptability

Every organization is different, and technology is changing constantly. The AI solution you choose should be customizable to fit your organization's specific needs and capable of adapting to future technologies. The vendor should also actively incorporate user (read: your) feedback into its development process.

"Workflow is holy. Whatever system you bring in, make sure your clinicians won't be operating different systems day-to-day. Know the difference between integration and embedding, and make your own references by contacting current customers to understand their experiences."

Dror Zaide | COO, Eleos

"In behavioral health, data and AI security concerns can't be taken lightly—by vendors or the organizations adopting their technology. That's doubly true in our current climate, where it seems like headlines about breaches and sensitive data being leaked to the dark web sprout up like weeds. Add ransomware to the mix, and it's a healthcare IT leader's nightmare fuel."

Raz Karmi | CISO, Eleos

6. Provider-Centered AI Documentation

AI should be all about supporting, not replacing, providers by providing preliminary note drafts and highlighting care patterns. Providers should then review, revise, and approve the note prior to submission to ensure it is accurate, relevant, and reflective of the care provided.

In addition to performing their own research and seeking recommendations from their network, behavioral health leaders must ask the right questions to ensure any AI solution they are considering is truly the right one for their specific organization.

"Yes, it's helping us; yes, it's a tool—but we as clinicians signing off on the note need to read the note, we need to make sure it reflects the session, and we need to make changes and edits to it where it doesn't."

Ashley Newton | CEO, Centerstone's Research Institute

Here are the questions we recommend asking an AI vendor before committing to their product:

- Why should we choose this tool over other tools, products, or actions that address our problems?
- How does your product fit into our staff workflow?
- What support do you provide once customers sign on with you?
- What do you guarantee?
- How do you secure data and ensure organizations remain compliant with HIPAA and other industry standards?
- Can organizations request custom-built features? Does that cost more?
- How does this tool interact with existing technology, such as an EHR?
- Does your product integrate or embed with my current technology?
- How long does it typically take to fully implement your solution?
- What happens if you can't meet the agreed-upon timeline?
- What are the escape clauses?
- Are there any evaluations or preparations we should complete internally prior to implementing the tool (e.g., internet connectivity, upgrades to the EHR system, level of staff knowledge/skill with technology)?

The Bottom Line: Due Diligence Matters

Remember, a great AI partner will position your behavioral health organization for operational and clinical success for years to come. The stakes are high, so take the time to consider all your options. The right AI software is a game-changer—it can transform your organization, making care delivery a smoother, more enjoyable and effective process for clients and providers alike.

Stage 4:

Implementing an AI Solution

Bringing in new technology can feel overwhelming—especially in industries that have been slower to adopt it, like behavioral health. But with careful planning, vendor support, and some time, effort, and patience, taking full advantage of technology to support your staff and clients is possible.

We asked Eleos leadership, team members, and customers to share the strategies they've used to achieve a successful tech implementation. Here's what they had to say.

"We try to have staff from all areas present. One change can impact all departments, so it's important to make sure everyone is represented."

Hattie Tracy | President/CEO, Coleman Health Services

1. Build a dedicated implementation team.

Tech implementation is never a one-person show—it takes a team of people to accomplish all the tasks involved. Decide who should be on that team, assign roles, and keep everyone accountable to the plan.

Who Should Be on Your Implementation Team?

Before rolling out new AI technology, you'll need to identify and assign key implementation team roles. Here are the major players Eleos recommends—and the types of tasks they should be responsible for:

IT Networking Lead

Ensures all technical systems—like secure logins and telehealth integrations—are set up and working correctly. Handles troubleshooting for any tech issues during the rollout.

EHR Admin

Manages connection with the Electronic Health Record (EHR) system, setting up user accounts, configuring the system based on needs, and ensuring everyone has proper access.

Clinical Leads

Clinical managers or senior clinicians who communicate plans before launch and support their colleagues in adopting the new system after go-live.

Training Lead

Runs training sessions to teach staff how to use the new system and provides ongoing support to keep everyone up to speed on new features.

Executive Sponsor

A senior leader who secures necessary resources, participates in high-level discussions, and resolves any major issues that arise during the implementation.

Data Lead

Tracks key metrics to measure the impact of the new system, providing data-driven insights for continuous improvement.

Project Lead

Organizes meetings, sets timelines, and ensures everyone is on the same page to keep the project running smoothly.

2. Secure provider and client buy-in.

Clinical staff play the most important role in the implementation process, so make sure they have what they need to succeed. Involve clients by explaining how the new tool will help them reach their treatment goals.

"All clinician-facing changes should be combined into one big change. Every little change is going to feel huge for clinicians. Whatever training you do, it's going to test them. So, if you're switching to a new EHR, pair it with your new telehealth platform. Couple everything together, and have all your vendors work together to combine their training to make it easier for your clinicians."

Dror Zaide | COO, Eleos

"Clinicians should be enthusiastic and transparent. Explain how the new tool will help clients reach their treatment goals."

Dale Klatzker, PhD | Retired CEO, Gaudenzia

3. Manage change and coordinate logistics.

Rely on your vendor's expertise and support, and make sure you've clearly defined roles and responsibilities on both sides. Consistent dialogues with both the vendor and relevant stakeholders are needed.

"Whoever is running the project needs to have good working relationships with both the IT and the EHR teams. There need to be consistent touchpoints with the vendor and key stakeholders at the program levels, and efficient means of communication are critical to success."

Andrew Schmitt, LCSW | Director of Outpatient Services, Guadenzia

"Assuming the technology in question is an enterprise implementation, treat the technology as a strategic, not tactical, investment. Most enterprise projects change the way organizations do business. As such, the leaders, particularly the CEO, need to communicate to all affected staff that 'this is now how we do business.'"

Dennis Morrison, PhD | Owner, Morrison Consulting

4. Foster a positive training environment.

The training process should give new users the best possible first impression of the platform. Keep sessions short and simple, and make them engaging.

"Keep training sessions around two hours to ensure providers can start using the product immediately and retain what they've learned."

Christina Stewart | Training Lead, Eleos

Training Tips for Successful AI Rollout

Keep It Short and Focused:
Training sessions should be concise and to the point. Aim for around two hours to keep participants engaged without overwhelming them.

Create a Safe Learning Space:
Encourage an open environment where providers feel comfortable asking questions and expressing concerns. Address any issues directly to maintain their trust and buy-in.

Engage and Energize:
Make training sessions lively and engaging. Inject energy into the room—whether through interactive activities, humor, or even mid-training stretches—to keep enthusiasm high.

Find Your Peer Champions:
Identify staff who are quick to adopt the technology and involve them in training their peers. Peer-to-peer coaching can be more relatable and effective.

Encourage Lightbulb Moments:
Help staff understand how the new technology can positively impact their work and quality of life. These "aha" moments are key to driving adoption and excitement.

Provide Follow-Up Resources:
Offer a variety of follow-up resources—such as user guides, video tutorials, and FAQs—so staff can revisit training material as needed.

5. Leverage peer champions.

Identify your best users early on and leverage them for peer training groups or one-on-one coaching. Capture testimonials and circulate them internally to build excitement.

"Use peer champions to help lagging adopters get more comfortable with the new technology."

Nisheeta Setlur | VP of Customer Success, Eleos

6. Define and measure success.

Establish what success looks like before beginning the implementation process, and use that criteria as a guide for evaluating results afterward. Set specific goals and key performance indicator (KPI) benchmarks before rollout, and continuously track progress toward those goals.

"The most important thing a behavioral health leader can do to prepare for the integration of technology is to have a clear understanding of the desired outcome. The only way to measure success is to start with an outcome in mind, implement the predicted method of reaching that outcome, and monitor results."

Josh Cantwell | COO, GRAND Mental Health

"I believe leaders have three responsibilities in this space: clinical excellence, fiscal accountability, and customer service. Every major decision I had to make as a CEO was a tradeoff of these three things. So, 'success' will likely live somewhere in the combination of these three areas."

Dennis Morrison, PhD | Owner, Morrison Consulting

7. Create a continuous feedback loop.

Continuously track progress toward your goals and create a feedback loop with your vendor. Collecting and communicating data early and often helps identify areas in need of adjustment and ensures ongoing success.

"Regular user surveys or live feedback sessions help ensure ongoing success."

Kate Benedetto | Manager of Enterprise Applications, Mental Health Partners (MHP)

The best way to make your tech implementation successful is to plan well, gather support from all levels of your organization, and set the stage for continuous improvement.

Stage 5:

Optimizing AI Use in Your Organization

The implementation of any new technology—especially an AI platform—is a major achievement, but it's not the end of the journey. In fact, the period following the initial rollout can be even more important, because that's when you make sure the technology actually:

- delivers value,
- aligns with organizational goals, and
- evolves with the needs of both the organization and the individual users.

Optimization is an ongoing process that involves continuous monitoring, feedback collection, and collaboration with your vendor to refine and enhance the technology's impact.

1. Continuous Monitoring and Measurement

No organization should take a "set it and forget it" approach to AI adoption. If you want your new system to be effective and valuable over the long term, you'll need a structured approach to monitoring and measuring impact.

Here's how.

Define what you're looking for.

Before you start measuring anything, take a moment to define what success actually looks like for your organization. What are you hoping this technology will do? Will it make documentation faster, improve the quality of notes, boost clinician satisfaction, or something else entirely? Getting specific about your goals from the outset will help you focus on the data that truly matters.

Establish the measures to track.

Now that you've got a clear goal in mind, it's time to figure out how you'll measure progress. What numbers will tell you whether you're on track or in need of an adjustment?

These metrics will vary depending on what the software does, but here are some metrics Eleos customers might use:

Time to Complete Notes:
How long are clinicians spending on documentation? Tracking this metric can highlight efficiency improvements.

For example:
"Providers using Eleos saw a 50% reduction in note-taking time, freeing up 80 hours in just six weeks."

Note Quality and Compliance:
The integrity of your documentation is key, and finding ways to measure note quality can help you assess the platform's impact on compliance risk.

For example:
"Eleos cut critical copy/paste errors from 7.7% to zero, a clear sign that the quality and compliance of notes improved significantly."

Clinician Satisfaction:
How do the people using the technology feel about it? Collecting regular user feedback on an ongoing basis is essential.

For example:
"Eleos users achieved an 80% satisfaction rate with the software and a 15% boost in overall satisfaction with their note-taking process."

Progress-Related Keywords:
What's actually being documented?

For example:
"Since implementing Eleos, we've observed a 27% increase in progress-related keywords in submitted notes, indicating that provider documentation is more thorough and better aligned with clinical goals."

Gather and analyze the data.

Collecting data is just the start; what really matters is what you do with it. Set up a process for gathering the right data regularly, whether it's through automated reports, manual checks, or direct feedback from users. But don't stop there—analyze it to uncover trends, spot areas for improvement, and recognize what isn't working as expected.

For example, if you find that some clinicians are consistently faster than others at completing notes without compromising quality, dive into their workflows to see if their approach can benefit the entire team. On the flip side, if you notice recurring issues or unexpected outcomes, this data gives you the leverage to go back to the vendor, ask for fixes, or even reconsider your approach if the technology isn't delivering as hoped.

2. Regular Vendor Check-ins

Optimization doesn't happen in isolation. Regularly scheduled check-ins with your vendor are essential for:

Reviewing Metrics:
Your vendor can offer a fresh perspective on the data you're collecting. Going over performance metrics and user feedback together can lead to practical strategies for improvement. Vendors often see how their tools work across different organizations, so they might bring up solutions or enhancements you hadn't thought of.

Learning About New Features:
Technology is always changing. Your vendor will likely roll out updates, new features, or best practices that could help you make the most of the tool. Staying informed will help your organization take advantage of any advancements as they become available.

Accessing Resources and Support:
Many vendors offer ongoing training, resources, and support to help you. Whether through webinars, help articles, case studies, or a community of other users, these resources can help you stay on top of platform enhancements and best practices.

3. Repeated Improvement

Optimization is a repetitive process. As you gather data and insights, you'll use them to make regular tweaks and adjustments to your use of the technology. That might mean:

Adjusting Workflows:
If certain parts of the technology aren't being used as intended, it might be time to adjust workflows or offer extra training to be sure everything is working as efficiently as possible.

Customizing Features:
As your team increases their use of the technology and your needs evolve as an organization, you may discover opportunities to tailor or fine-tune certain features. For instance, Eleos offers tools like intervention libraries and note enhancement capabilities that can be customized to fit your organization's unique needs.

Scaling the Technology:
If the technology is proving its worth, you might consider extending its use to other areas of your organization or integrating it with other tools.

4. A Culture of Continuous Improvement

Encourage your team to see AI tech implementation as an ongoing pursuit, not just a one-and-done project. If everyone views this as a shared responsibility, you can make sure your technology keeps delivering value and that your organization stays responsive to the community's needs.

Acknowledgments

This guide wouldn't have been possible without the wisdom and input of the following contributors:

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