

Month: **July 2024**

REPORT DETAILS



Total Calls

2333



AVG Duration (m)

5



Deflection %

50



Hours Saved

92



Cost Benefit

4598

Headline: Approximately 50% of customer service calls are automatable with a hybrid approach, enabling significant deflection and operational efficiency gains.

Rollout mix: 15% Short Term, **60%** Medium Term, **25 %** Long Term

SCOPE & METHODOLOGY

- Analyzed 20 categorized call types covering claims, billing, policy servicing, and disputes.
- Evaluated call volume, average handle time, complexity, data needs, and resolution outcomes.
- Assessed automation scores and deflection estimates to segment initiatives by deployment phase.

KEY OPPORTUNITY AREAS

Category	Volume	Avg Automation Score	Avg Deflection %	Dominant Phase
Claim Status Update	820	6	50	Medium-Term
Lodge a New Claim	464	6	50	Medium-Term
Submit/Request Claim Documentation	420	6	50	Medium-Term
Policy Cancellation	163	6	58	Long-Term
Dispute Claim Outcome	140	5	35	Long-Term

Insight

High-volume intents like Claim Status Update and Lodge a New Claim show strong automation potential via multi-turn voice bots, handling routine inquiries and status updates. Policy Cancellation and Payment Setup calls are largely straightforward, suitable for early automation. Complex dispute and document submission calls require hybrid models with live agent escalation. Data lookup IVR can support billing and status inquiries effectively. Overall, a hybrid automation strategy can deflect ~50% of calls, saving ~292 agent hours monthly and \$14,600 in costs.

ROLLOUT ROADMAP

Short-Term (15% of calls)

Focus: Automate straightforward billing inquiries and policy cancellations with data-lookup IVR and voice bots.

- Automate straightforward billing inquiries and policy cancellations with data-lookup IVR and voice bots.
- Deploy FAQ chatbots for common procedural questions and payment failure notifications.
- Focus on quick wins with low complexity and high deflection ratios.

Medium-Term (60% of calls)

Focus: Automate high-volume claims status and new claim lodgment calls with multi-turn voice bots.

- Automate high-volume claims status and new claim lodgment calls with multi-turn voice bots.
- Integrate backend data systems for real-time claim status, payment verification, and document tracking.
- Implement seamless live agent escalation for complex or unresolved cases to maintain service quality.

Long-Term (25% of calls)

Focus: Develop advanced automation for complex dispute resolution and multi-party coordination.

- Develop advanced automation for complex dispute resolution and multi-party coordination.
- Enhance integration with CRM, scheduling, and knowledge bases for personalized interactions.
- Invest in AI-driven conversational agents to handle nuanced claim disputes and legal inquiries.

Prioritisation rule used

Volume × Automation Score × Deflection Ratio, weighted by complexity and integration feasibility.

CHANNEL RECOMMENDATIONS

Category	Call Type / Topic	Primary Channel	Secondary Channel	Rationale
Claim Status Update	claim	Multi-Turn Voice Bot	Hybrid	<p>Moderate automation score and volume suggest this is viable with some changes. The Claim Status Update intent involves a high volume of calls with a mix of straightforward status inquiries and moderately complex interactions requiring data access and personalized explanations. While many calls involve routine status checks, payment confirmations, and procedural FAQs suitable for automation via a multi-turn voice bot, a significant portion requires nuanced understanding, coordination, or escalation, necessitating a hybrid approach with seamless live agent handoff. Implementing automation here can deflect approximately half of the call volume, improving efficiency and customer experience while reserving live agents for complex or sensitive cases.</p>
Lodge a New Claim	claim	Multi-Turn Voice Bot	Hybrid	<p>Moderate automation score and volume suggest this is viable with some changes. The call intent to lodge a new claim involves a mix of straightforward inquiries and moderately complex interactions requiring data verification, document collection, and coordination with third parties. While many routine and informational aspects can be automated via a multi-turn voice bot, complex cases involving liability disputes, multiple parties, or detailed claim processing will still require human intervention. Implementing a hybrid approach combining automated self-service with seamless live agent escalation will optimize operational efficiency and improve customer experience while managing complexity.</p>

Category	Call Type / Topic	Primary Channel	Secondary Channel	Rationale
Claim Status Update	customer service	Multi-Turn Voice Bot	Hybrid	Moderate automation score and volume suggest this is viable with some changes. The call intent group involves a wide range of claim status inquiries with varying complexity, data access needs, and resolution outcomes. While many calls involve straightforward status updates, procedural questions, and data verification that can be handled by a multi-turn voice bot with backend integration, a significant portion requires nuanced judgment, coordination with third parties, or escalation due to complexity or unresolved issues. A hybrid approach combining automated self-service for routine inquiries and seamless escalation to live agents for complex cases will maximize deflection while maintaining customer satisfaction.
Submit/Request Claim Documentation	claim	Multi-Turn Voice Bot	Hybrid	Moderate automation score and volume suggest this is viable with some changes. The call intent primarily involves document submission requests, status follow-ups, and general claim process inquiries, many of which are straightforward and procedural, making them suitable for automation via a multi-turn voice bot. However, the moderate to high complexity of some calls, need for backend data access, and frequent unresolved issues requiring human intervention suggest a hybrid approach with seamless escalation to live agents is necessary. Implementing automation for routine inquiries and document status checks can deflect about half of the call volume, improving efficiency while maintaining quality for complex or sensitive interactions.
Submit/Request Claim Documentation	customer service	Multi-Turn Voice Bot	Hybrid	Moderate automation score and volume suggest this is viable with some changes. The call intent involves a mix of straightforward inquiries and complex, multi-party coordination requiring backend data access and nuanced judgment, limiting full automation

Category	Call Type / Topic	Primary Channel	Secondary Channel	Rationale
				potential. A multi-turn voice bot can handle common procedural questions, claim status checks, and document submissions, while complex cases should escalate to live agents via a hybrid approach. Investing in automation for routine interactions can improve efficiency and customer experience, but human expertise remains essential for complex claim disputes and coordination.

DATA & INTEGRATION REQUIREMENTS

- CRM integration for customer and policy data access
- Claims management system for real-time status and document tracking
- Authentication services for secure identity verification
- Knowledge base for FAQ and procedural guidance
- Scheduling system for callback and appointment management

Mitigation Strategy

Phased integration starting with CRM and claims system, leveraging APIs for data lookup. Use secure authentication protocols. Implement knowledge base updates in parallel. Employ fallback to live agents for incomplete data or complex cases.

KPI & BENEFIT TRACKING

- Monthly deflected call volume
- Agent hours saved per month
- Cost savings (\$) from deflection
- Customer satisfaction and NPS scores
- Automation containment and escalation rates

NEXT STEPS

Prioritize high-volume intents

Develop multi-turn voice bots

Integrate CRM and claims data

Implement secure authentication

Establish live agent escalation

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