

Month: **October 2025**

REPORT DETAILS



Total Calls

2472



AVG Duration (m)

5



Deflection %

58



Hours Saved

111



Cost Benefit

5542

Headline: Approximately 58% of customer service calls are suitable for automation or self-service channels, enabling significant deflection and operational efficiency gains.

Rollout mix: 5% Short Term, 40% Medium Term, 55 % Long Term

SCOPE & METHODOLOGY

- Analyzed 40 categorized call types with detailed attributes including volume, complexity, data needs, and resolution flows.
- Evaluated automation readiness using Automation Score, candidate status, and strategic summaries to segment calls into deployment phases.
- Quantified business benefits by estimating deflected calls, agent hours saved, and cost savings based on average handle times and \$50/hr cost.

KEY OPPORTUNITY AREAS

Category	Volume	Avg Automation Score	Avg Deflection %	Dominant Phase
Claim Status Update	771	7	60	Medium-Term
Lodge a New Claim	437	6	55	Medium-Term
Submit/Request Claim Documentation	393	6	55	Medium-Term
Policy Cancellation	178	7	62	Long-Term
Payment Setup or Change	150	7	61	Long-Term

Insight

High-volume, routine inquiries such as claim status updates, payment failures, and policy cancellations present the strongest immediate automation opportunities. These calls typically have moderate complexity and data needs, making them suitable for data-lookup IVR and multi-turn voice bots with live agent escalation for exceptions. More complex or sensitive calls involving disputes, multi-party coordination, or nuanced judgment require hybrid approaches and longer-term automation investments.

ROLLOUT ROADMAP

Short-Term (5% of calls)

Focus: Automate straightforward payment failure and policy cancellation calls with high deflection potential.

- Automate straightforward payment failure and policy cancellation calls with high deflection potential.
- Deploy data-lookup IVR and multi-turn voice bots for consistent, low-complexity interactions.
- Ensure seamless live agent escalation for exceptions and verification steps.

Medium-Term (40% of calls)

Focus: Target high-volume claim status updates, document submissions, and payment inquiries with partial automation.

- Target high-volume claim status updates, document submissions, and payment inquiries with partial automation.
- Implement hybrid models combining conversational voice bots, FAQ chatbots, and data-driven IVR systems.
- Focus on improving backend data integration and identity verification to increase automation scope.

Long-Term (55% of calls)

Focus: Address complex claim disputes, multi-party coordination, and nuanced billing inquiries requiring human judgment.

- Address complex claim disputes, multi-party coordination, and nuanced billing inquiries requiring human judgment.
- Invest in advanced AI, backend system integration, and hybrid escalation frameworks.
- Prioritize automation of routine components while maintaining live agent support for sensitive cases.

Prioritisation rule used

Calls segmented by Automation Score, complexity, data needs, and strategic summaries to balance quick wins with sustainable long-term automation.

CHANNEL RECOMMENDATIONS

Category	Call Type / Topic	Primary Channel	Secondary Channel	Rationale
Claim Status Update	claim	Data-Lookup IVR	Multi-Turn Voice Bot	Moderate automation score and volume suggest this is viable with some changes. This call intent group involves a high volume of routine inquiries such as claim status updates, payment confirmations, and procedural guidance, many of which can be effectively automated through data-driven IVR and conversational voice bots. However, the presence of moderate to complex cases requiring backend data access, personalized explanations, and occasional human judgment suggests a hybrid approach with live agent escalation for exceptions. Investing in automation for the straightforward interactions will improve efficiency and customer experience while reserving live agents for complex or sensitive cases.
Lodge a New Claim	claim	Multi-Turn Voice Bot	FAQ Chatbot	Moderate automation score and volume suggest this is viable with some changes. The call intent group involves a mix of straightforward claim lodgment, information provision, and updates that are moderately complex but follow standard procedures. Automation can effectively handle initial claim registration, FAQs, and simple updates through multi-turn voice bots and chatbots, reducing agent workload. However, complex liability discussions, multi-party coordination, and nuanced claim assessments require live agent involvement, suggesting a hybrid approach for optimal customer experience and operational efficiency.
Claim Status Update	customer service	Data-Lookup IVR	Multi-Turn Voice Bot	Moderate automation score and volume suggest this is viable with some changes. This call group involves a high volume of routine inquiries around claim status, payment, and procedural guidance, making it a strong candidate for automation through data-driven IVR and conversational voice bots. However, the complexity and need for backend data access, identity verification, and occasional nuanced explanations suggest that full automation is not yet feasible, and hybrid approaches with live agent escalation for complex cases are recommended. Implementing automation for straightforward status updates and procedural guidance can significantly reduce agent workload and improve customer experience.
Submit/Request Claim Documentation	claim	Multi-Turn Voice Bot	FAQ Chatbot	Moderate automation score and volume suggest this is viable with some changes. This call intent group involves a high volume of routine, document-related inquiries with mostly straightforward resolution steps, making it a strong candidate for partial automation. Automating document requests, status updates, and procedural guidance via a multi-turn voice bot and FAQ chatbot can reduce agent workload and improve response times. However, due to moderate complexity in some cases and the need for data verification or escalation, a hybrid approach with live agent support for exceptions is recommended.
Submit/Request Claim Documentation	customer service	Multi-Turn Voice Bot	FAQ Chatbot	Moderate automation score and volume suggest this is viable with some changes. This call intent group involves a mix of straightforward inquiries and moderately complex interactions requiring data verification and coordination with third parties. Automation can effectively handle routine status updates, documentation guidance, and claim lodgment assistance, but complex liability disputes and multi-party coordination will still require human intervention. Implementing a multi-turn voice bot complemented by an FAQ chatbot can deflect a significant portion of calls while ensuring seamless escalation for complex cases.

DATA & INTEGRATION REQUIREMENTS

- **CRM system integration for real-time customer and policy data access**
- **Authentication and identity verification services**
- **Scheduling and booking system connectivity for claims and hire car arrangements**
- **Knowledge base integration for FAQ and procedural guidance**

Mitigation Strategy

Adopt phased integration starting with high-impact systems (CRM, authentication) to enable core automation capabilities, followed by incremental connection of scheduling and knowledge bases. Use APIs and middleware to ensure data consistency and support hybrid escalation workflows.

KPI & BENEFIT TRACKING

- Monthly deflected calls and deflection rate (%)
- Agent hours saved per month
- Cost savings in \$ based on agent time reduction
- Customer satisfaction and resolution rates post-automation
- Live agent escalation volumes and resolution times

NEXT STEPS

Validate integration capabilities with CRM

Develop pilot for payment failure automation

Design hybrid escalation workflows

Implement multi-turn voice bot for claim status

Establish KPI monitoring dashboards

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