

CASE STUDY: CONVERSATIONAL AI & AUTOMATION

National health insurer redefines claims journeys with Parloa's Voice AI Automation

Delivering smarter, more human self-service for phone-based claims support



About the Company

The client is a nationally recognized health insurance provider, known for delivering robust digital experiences and exceptional service to millions of policyholders.

Challenges

Despite significant investment in digital channels, voice interactions remained largely manual and inefficient. Routine tasks — such as confirming surgery dates or reporting return-to-work timelines — consumed valuable agent time and often delayed support, especially when claimants missed outbound calls and had to call back.

Key challenges included:

- High agent workload due to repetitive, form-driven conversations
- Missed outbound calls resulting in service delays
- Lack of intuitive self-service options via voice
- Limited scalability of voice-based support workflows

To address these issues, the insurer aimed to create a hybrid experience that bridged digital self-service and live-agent support. The goal was to bring the same seamless, user-friendly experience of its digital workflows to the phone channel using conversational AI — automating routine, time-consuming tasks without compromising the human element.

The Solutions

To overcome these challenges, the insurer partnered with Servion, Parloa's implementation partner, to automate voice interactions. Leveraging Parloa's AI Agent Management Platform (AMP) and Servion's expertise in voice-first AI deployments, the team developed a scalable, human-centric AI voice assistant to guide claimants through various processes without requiring live-agent interaction.

The solution was built on three core pillars:

- **AI-Driven Voice Automation:** Parloa's platform enabled natural, guided conversations capable of autonomously handling tasks such as collecting surgery dates and confirming return-to-work timelines.

- **Reusable Components for Scalability:** Servion utilized modules, such as a robust “date-collection” component, to support rapid deployment across multiple workflows with minimal redesign.
- **Conversational Design Expertise:** By incorporating Inoria’s conversational AI experience and the INO AI framework, Servion crafted flows that were intuitive, context-aware, and respectful of callers’ time, ensuring every interaction felt seamless and purposeful.

This collaborative approach transformed the insurer’s voice channel into a self-service engine that delivers experiences on par with its digital offerings.

Benefits

The transformation delivered immediate and measurable outcomes:

- 71.4% task automation rate, with most calls resolved independently by the voice assistant
- Reduced agent workload by eliminating basic data entry calls
- Enhanced claimant experience through natural, guided interactions
- Faster resolution and improved convenience for callers across various use cases, including business hours inquiries, FAQs, and routine form submissions

Intelligent interaction design—such as proactive prompts that guide users to completion—ensured callers felt supported, understood, and in control even without live-agent involvement.

This success marks only the beginning. With a strong AI voice foundation, the insurer plans to expand automation across additional claims workflows. Future enhancements include deeper system integrations, personalized voice interactions, and proactive outbound automation — all aligned with the insurer’s mission of supporting people when it matters most.

Client Testimonials



The flexible AI-based speech recognition makes it easy for callers to communicate their concerns, even if they don’t know the right terminology. They can get in touch with the right person quickly and easily.

Tom Schneider

Consultant for Process and Project Management



SwissLife



Where Journeys **get done**

Servion is a US-headquartered global systems integrator with over three decades expertise in customer experience (CX) transformation. With over 1,000 employees worldwide, we support brands like Costco, Rogers, Roche, Farmers, and Citibank in delivering exceptional service solutions. Our JourneyWorCX™ framework amplifies human connection through intelligent technology, creating customer journeys that drive growth. Servion makes journeys that work.

Servion is a registered trademark worldwide. The mention of other product and service names might be trademarks of other companies. This document is current as of the initial date of publication and may be changed at any given point of time.

© Servion Global Solutions

Learn more at servion.com

Follow us at linkedin.com/company/servion-global-solutions

For more information, contact marketing@servion.com