inoria
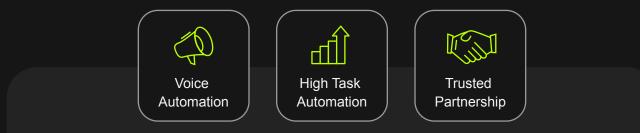a **calltower** company

parloa

calltower

AI-Powered Voice Automation for Insurance Claims

How an Insurance Leader is Automating Voice Tasks to Improve Claims Journeys

Voice Automation

High Task Automation

Trusted Partnership

This nationally recognized health insurance company—already known for its strong digital customer experiences—wanted to build on its success with a new kind of self-service: one that worked over the phone. With millions of policyholders and a focus on efficiency and customer satisfaction, the team turned its attention to automating voice experiences.

The goal was simple but bold: replicate the self-guided ease of the company's digital workflows in the voice channel, using AI and automation to handle routine data collection calls.

THE HIGHLIGHTS

Challenge

○ Manual outbound calls for routine claim updates

○ Missed calls created delays and increased agent load

○ No scalable voice self-service solution in place

Solution

○ AI-powered voice assistant built with Parloa + Inoria

○ Natural, guided interactions for claim-related tasks

○ Reusable modules (e.g., date collection) for scalable automation

Outcome

○ 71.4% task automation rate (call containment)

○ Reduced agent workload and faster claimant resolution

○ Improved customer experience and operational efficiency

The Bottom Line

In the insurance industry, voice calls are a major touchpoint for customers—but it's often the channel that is least automated and requires the heaviest burden for support teams. For one national insurer, voice presented a clear opportunity: why not bring the same kind of intuitive, efficient self-service available in digital channels to the phone?

Partnering with Parloa and Inoria, a CallTower company, the insurance company rolled out an intuitive, AI-powered voice assistant that guides claimants through leave-related tasks—like reporting a surgery or confirming a return-to-work date—without ever needing to speak to a live agent.

> "That's the kind of interplay... the kind of symbiosis between ourselves and Parloa—our ability to communicate, ask 'what should we do?' and make the solution bulletproof. And fully supporting the end user in the business along the way, perfectly."
>
> Marc Goldstein, Director - Conversational AI Practice, Inoria, a CallTower company

The Challenge: From Missed Calls to Missed Opportunities

Before automation, the insurer would handle routine tasks—like confirming a surgery date, an expected delivery date, or a return-to-work timeline—via outbound calls to the claimant. If they missed those calls and phoned back, they'd reach an agent who had to manually walk them through a form.

These manual processes tied up agents with repetitive form-filling tasks for routine data collection. There was a lack of certainty for claimants and a need to provide an interim level of support between fully digital self-service and a support call with a live agent.

"Walking through a digital form with an agent was taking time and money away from the insurer," observes Marc Goldstein, Director of Conversational AI, from Inoria, a CallTower company. *"They certainly wanted to replicate the support they offered on their digital channel… but we also knew we wanted to evolve and accommodate the voice channel in a way that Parloa does with its technology, and Inoria, a CallTower company, does with our professional services acumen."*

The Solution: Voice Automation, Thoughtfully Designed

company. Parloa's platform powered the voice assistant, while Inoria, a CallTower company, brought its deep expertise in conversational AI design and implementation—leveraging Inoria- A CallTower Company's Conversational AI practice to ensure consistency, adaptability, and scale. Together, they created a friendly, intuitive, AI-powered voice experience that rivaled and even surpassed the company's digital experience. And with smart reusable components (like a "date-collection" module), the system was designed for scale from day one.

Inoria, a CallTower company, emphasized discovery, context, and ease of use by designing flows that adapted digital logic into natural, voice-first interactions. With Parloa, they crafted reusable conversation components, such as a robust date-collection construct, enabling scale across workflows. The solution was as elegant as it was effective, rooted in real conversation design principles.

> *"Right from the start, I saw all the opportunities we could do with the Parloa platform,"* **says Léandre Guertin, Application Developer at Inoria, a CallTower company.** *"The possibilities were endless."*

The insurer's team also deserves credit for the success of the implementation, says Goldstein, which came as a result of their vision and hard work. "It's rare to engage with the kind of personnel that we did with this client," he notes. "Rolling up their sleeves, getting their hands dirty, completely invested in the conversation design and technical environment."

The Results: Containment and Customer-Centricity

The voice automation quickly delivered results: a high containment rate, representing a significant reduction in manual workload and a boost in claimant convenience. The experience was intuitive, guided, and respectful of the caller's time and intent. "Containment was the metric in the spotlight," *says Goldstein*. "Obviously CSAT is very important, but CSAT should come with the expediency and the feeling that they're moving through a natural dialogue."

When technical constraints meant that mid-call agent transfers wouldn't retain form progress, the teams worked around it, educating and guiding users gently with prompts like "You're almost there" to help obtain completion and head off future frustration.

The result was not just a technical success and a design triumph, balancing business goals with customer empathy.

+ 71.4% task automation rate (calls contained by voice assistant).

+ Reduced call burden on agents, helping to handle use cases such as caller lookup, business hours checks, form surveys, email and FAQs

+ Improved experience for claimants with natural, guided interactions.

> *"What stands out with Inoria, a CallTower company, is the care they take to craft authentic customer experiences. Their adaptable, personalized approach aligns perfectly with Parloa's vision and helps us deliver high-impact solutions that truly connect businesses with their customers."* **Dorothy Copeland, SVP Partner Ecosystem**

The Partnership: Trust, Symbiosis, and Shared Vision

From the start, the collaboration between Inoria, a CallTower company, and Parloa was characterized by mutual respect and aligned values. Inoria, a CallTower company, saw Parloa not as a vendor but a true partner—with flexible, forward-thinking technology and a commitment to voice-first innovation. "We've now been partners with Parloa for about a year and a half," says Goldstein. "We knew that we could complement them with our professional services experience and our adherence to conversational AI best practices."

"Everything [with the Parloa platform] is designed in a way that you can adapt to whatever your use case is," adds Guertin.

Parloa, in turn, saw Inoria, a CallTower company's depth of experience and rigor as essential to making the implementation succeed. As Andrew Porter, Lead Partners Manager from Parloa explains: "From our very first collaboration with Inoria, a CallTower company, it was clear we had found a kindred partner—one that shares our voice-first philosophy and brings deep expertise in conversation design. Together, we're creating solutions that deliver real impact."
The two companies operate "with the same kind of desire to build on contact center platforms with a voice-first mindset," says Goldstein. The result is a symbiotic partnership that blends best-in-class tools with world-class service design.

"The amazing, interesting part of this is that transformation from the digital interaction to the voice interaction. It's a delicate procedure that requires conversational AI design best practices along with exquisite technology. That's what the partnership between Inoria, a CallTower company, and Parloa is all about—being able to put those two sides of the coin together."

Marc Goldstein, Director - Conversational AI Practice, Inoria, a CallTower company

Looking Ahead: Scaling What Works

Both teams see this as just the beginning. With the foundation in place, future phases for this client and others promise deeper integrations, expanded workflows, and even greater automation. And at the heart of it all is a shared focus on the person at the other end of the line. As Inoria, a CallTower Companie's Conversational AI practice continues to evolve, it will further accelerate how clients bring voice-first innovations to life—making every new implementation faster, smarter, and more customer-centric.

"Parloa is a really strong part of the foundation of Inoria's, a CallTower company, conversational AI practice," **says Goldstein**. *"They make our partnership something we look forward to building on. We're convinced there's going to be great things to come… especially for the people for whom we provide the solutions, the end users—the most important people in the world to us."*

Let's Connect