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## Overview

Pull up last month's call log for an organization with a dozen locations, and the same few questions fill the top of it. What time do you close on Saturday? Which office does X-rays? Where do I send this form? Each one takes a minute to answer, and someone at every site answers them all day.

That's where automation should start. Put the wrong call type in front of an automated system first and callers learn to press zero. Put the right one there and they stop calling the front desk for answers that never needed a person.

This guide gives you a quick test for sorting your own call types. Then it walks through IVR examples from three industries (healthcare, insurers and benefit funds, and field services), with one call to automate first in each and one to send to a live agent.

## A Four-Question Test for Any Call Type

Take the ten most common reasons people call your business. If this isn't something you track, have your front desk categorize every call that comes in over a week. For each type of call, ask:

1. **How often does it come in?** Volume is key. A call you get twice a week isn't worth automating first, however simple it is.
2. **Is the answer the same for every caller?** "What are your hours?" has one answer per location. "Why was my claim denied?" has a different answer every time.
3. **Where does the answer live?** If it's already on your website, an automated system can give it today. If it lives in a scheduling, claims, or billing system, that system has to be connected first, so the call comes later.
4. **What happens if the answer is wrong, or the caller is upset?** A wrong closing time costs someone a wasted trip. A wrong answer about coverage, or a flat reply to someone who's frightened or angry, costs far more. Those calls go to a person.

Call types that come in often, have one answer, live on your website, and carry little risk are your first wave. Our white paper has the short version as a two-column table: what to automate cleanly, and what to route straight to a person.

The money adds up quickly. Gartner puts the median cost of a contact at $13.50 when it's handled by a person and $1.84 when the customer serves themselves.[1] McKinsey's analysis of millions of customer interactions found that 50 to 60 percent of them are still transactional.[2] You don't have to automate all of those. Start with the top three or four on your list.

# IVR Self-Service Options by Industry

### Healthcare

**Automate first: "Which location do I go to, and when is it open?"**

A health system with ten clinics gets this call all day. Long-time patients know where to go, but new patients and family members calling for a parent don't. They want to know which clinic does X-rays, whether the walk-in clinic is open on Sunday, and where to park. All of that is already on your website. An automated system can answer those questions and give the caller the right address and hours, at 9 p.m. as easily as at 9 a.m.

**Send to a live agent: anything about symptoms.**

"My daughter has a fever of 103, should I bring her in?" isn't a self-service call. The moment a caller describes symptoms, the call should go straight to a nurse line or the clinic, with no menu in the way. Set that rule before the first call goes live.

Appointment changes sit in between. Rescheduling comes in all day and follows the same steps every time. The answer lives in your scheduling system, though, so it belongs in a later stage, once that system is connected.

### Insurers and benefit funds

**Automate first: "How do I file a claim, and where do I send it?"**

Members of an insurer or a union benefit fund call with the same procedural questions every week: which form to use, which address or fax number it goes to, what the deadline is, and whether open enrollment has started. The answers are published, and they're the same for every member. That makes this the cleanest place to start. It also catches the calls that come in after the benefits office closes, when a member finally sits down with the paperwork.

The eligibility check is a good second step. Doctors' and dentists' offices call to confirm a member is covered before an appointment. Those calls are frequent and the answer is a yes or a no. It sits in your eligibility records rather than on your website, though, so it waits until those records are connected.

**Send to a live agent: a denied claim, or a death in the family.**

A member disputing a denial needs someone who can open the file and explain it. A spouse calling to report that a member has died should reach a person on the first try. Neither call comes in often, both carry a lot of weight, and your staff have more time for them once the procedural questions are handled.

### Field services

**Automate first: "Do you cover my area, and when are you open?"**

For a company running crews out of several branches, many calls come from people who haven't booked anything yet. Do you work in my town? Do you come out on weekends? Which branch handles my ZIP code? Those answers are fixed and already published. A system that understands the question can answer it and send the caller to the right branch to book.

Routing can help before any questions are even answered. When a caller says “my furnace stopped working” instead of pressing 3 for heating, the call can go straight to the branch and the team that handles it.

**Send to a live agent: no heat in January, water through the ceiling, or a question about a bill.**

Urgent repairs should reach a dispatcher right away. Billing disputes go to a person too, because how that call goes decides whether the customer books you again.

## Running the First Pilot

Pick one call type from your first wave, ideally one that came up at every location, and point it at the automated system for a few weeks. Then look at what happened. How many of those calls ended without a transfer? How many callers asked for a person anyway, and what were they asking? Listening to recordings of real calls will show you questions you didn’t plan for. Add the next call type once the first one is working. Our white paper lays out the full staged approach and the four numbers to track.

Computer Instruments has been building IVR and voice automation since 1979, and the AI Concierge is how we add conversational AI to the phone system you already run. Callers say what they need in their own words. It answers from a knowledge base built from your website, sends calls that need a person to the right number, and picks up at night, on weekends, and on holidays. You can play back recorded calls to hear what callers are really asking for. **Book a 20-minute demo** and hear it answer a call.

### Sources


1. Gartner, “Benchmarks to Assess Your Customer Service Costs,” doc. 5164231, February 1, 2024: the median cost per contact is $1.84 for self-service and $13.50 for assisted channels.
2. McKinsey & Company, “The contact center crossroads: Finding the right mix of humans and AI,” March 19, 2025: “50 to 60 percent of customer interactions remain transactional,” from an analysis of millions of interactions across more than 30 organizations.