



## IVR Buyer's Guide

### **A GUIDE FOR BUYING IVR AND DIGITAL SELF-SERVICE SOLUTIONS**

It's an exciting time to be in the market for an IVR. A modern system has the power to transform your business processes, increase revenues, lower operating costs and change the way your company is perceived by customers.

In many industries today, customer service is a key competitive differentiator. While a small handful of companies excel at delivering unrivaled service, others struggle to deliver service that can only be described as 'good enough' while attempting to maintain costs. Organizations evaluating IVR technology, either for the first time or to replace legacy systems, have a rare opportunity to shake up the status quo.

Over the last 10-15 years, IVR technologies have evolved. Organizations are no longer limited to all-in-one solutions that guarantee vendor lock-in or rigid systems that are difficult to modify without the help of IT. This IVR Buyer's Guide introduces some of the technological advances that IVR systems have undergone over the years and how they address common business challenges, like increasing IVR utilization and enabling customer self-service. This guide will give you a glimpse into what can be achieved with today's technologies and transform your expectations for your IVR.

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## CHAPTER 1

# Five IVR Failures to Avoid

Interactive Voice Response (IVR) systems save companies millions of dollars a year by automating high-volume service calls. But for many reasons, customers often “zero out” and are transferred to a live customer service agent. This is a major failure of an IVR system, and such failures have a direct impact on customer satisfaction and return on investment. Unfortunately, once implemented, few companies know how they might improve IVR system utilization.

Operational cost savings is one of the primary drivers for implementing an IVR system. It costs much less to service a customer call via an automated IVR system than it does with a customer service agent. On average, an IVR system costs two-to-four cents per minute, versus an agent at three-to-five dollars to handle the same call. It stands to reason, incremental improvements in IVR utilization can significantly impact ROI. Increasing automation by only 1-2% can result in millions of dollars in savings. Case in point: When a large financial services company that takes 200,000 calls a day increased its automation by 1-2%, it saw a \$1.5 million per year savings.

But that's not all. Contrary to popular belief, improvements in IVR utilization can actually increase customer satisfaction. The reality is this: Customers want easy access to information. They typically don't care if they get that information from a customer service agent or an IVR system – as long as they get the accurate and timely information they need, easily and efficiently.

Clearly, a little bit of automation can go a long way to increasing your cost savings and the ROI of your IVR system, and improving customer service. Here are five ways IVR systems fail, and tips for increasing utilization. When evaluating IVR systems, consider whether they provide the flexibility needed to keep customers from “zeroing out.”

### IDENTIFICATION AND AUTHENTICATION FAILURE

When a call comes in, the IVR application must first identify and authenticate the caller. There is no way around it. The system must ensure that the caller is who he says he is before any kind of request can be granted, issue addressed or information dispensed. It doesn't matter how well the IVR system is designed otherwise; if it can't identify and authenticate the caller, the system will fail and the call will go to a live customer agent, frustrating the caller in the process.

Look for an IVR that separates the identification and authentication processes and makes the difficulty of the processes reflect the sensitivity of the information provided by the IVR. For example, the IVR might perform a caller ID match to identify the caller by the number they're calling from. Then, common information that the caller is likely to know (such as the last four digits of the caller's social security number) can easily and partially authenticate him/her. This “partial authentication” information may be enough to establish a level of trust that is sufficient for providing an account balance. However, it's not enough information to allow the caller to complete tasks like changing a PIN or transferring funds. For those more complex and sensitive tasks, your IVR application will require full authentication, including full SSN, security questions, PIN, etc. Thus, you establish identification and authentication processes according to the task. For those tasks deemed highly secure or covered by compliance mandates, you fully authenticate the caller. For less sensitive tasks, your application can partially authenticate, creating an easy to use and less error prone application for the majority of callers. Adding caller ID and partial authentication to your IVR application will increase utilization and provide an instant ROI for this enhancement.

Look for an IVR that separates the identification and authentication processes and makes the difficulty of the processes reflect the sensitivity of the information provided by the IVR.

#### IVR UTILIZATION TIP

The processes used to identify and authenticate a caller depend on the vertical (financial services versus health care, for example), the company's goals and the sensitivity of information being exchanged. However, it's possible to make these steps easier for the caller and the IVR system.

## CONFUSING MENUS FAILURE

Offering too many options. Offering rarely chosen options before popular options. Sending callers to the wrong option... These are all signs that an IVR system menu is poorly designed. When callers cannot easily find the task they want and successfully navigate through the IVR system, they often are quickly frustrated and opt out to speak to an agent.

In addition, offer high volume choices first. It can be confusing and frustrating for callers if they have to listen to several options before getting to the one they want. Also, make sure that the IVR system works properly. If the caller presses three, are they directed to the proper branch in the tree? If your application supports speech, is the system accommodating noisy environments with touchtone fall back? Has the IVR system changed in accordance with customer host system changes? Occasionally testing your IVR system will ensure that the menus are logical and well written, and that the system is operating correctly.

## UNAVAILABLE TASK FAILURE

An IVR system will fail if the application doesn't offer the information or tasks callers are looking for. If the caller wants to report a lost credit card, change their mailing address or file a billing dispute, and the system doesn't offer that task, the call will go to live customer service every time. Users who navigate through multiple menus before discovering that the option is not available become frustrated, and the company may pay for tens-of-thousands of calls that could be automated.

The traditional methodology for identifying why callers are requesting live agents is to examine the contact center disposition reports. But those reports don't always tell the whole story. For example, a caller may have zeroed out to request a change of his mailing address, but then also asks for his balance. Upon completion of the interaction, a customer service agent will typically disposition the call for only one task. If the agent disposes the call as a balance request, that's not entirely correct. So to fully understand what tasks are going to the floor, you need to listen to live or analyze recorded calls – a time consuming and costly proposition.

A more effective option is choose an IVR system that allows you to insert a customer service transfer menu in your automated IVR that prompts callers for more information when they request an agent. The transfer menu can offer up to five options that you suspect are the main reasons callers request customer service agents, as well as a default choice of "something else." When callers select a specific option (i.e. billing, balances, etc.) you can send them to a skill group that specializes in that problem. More importantly, you are generating

### IVR UTILIZATION TIP

Limit your IVR system menu to no more than five options. If you have additional choices, categorize them under the five options and organize them into submenus.

### IVR UTILIZATION TIP

This problem seems easy enough to solve, right? You simply find out what tasks are being sent to the floor and add them to the automated IVR application. Not so fast. Identifying these tasks can be costly, time consuming and very misleading.

detailed IVR reports that confirm the specific tasks that are missing in the automated service. Most IVR application designers avoid this extra menu due to concerns that the additional step will inconvenience customers. But the caller is already dissatisfied, so the additional customer service menu is perceived as a benefit that they will receive specialized help.

It is recommended that this customer service transfer menu be highly configurable so you can quickly add, delete and move menu choices if, in fact, your customers are choosing "something else." It is also recommended that this menu be toggled on or off based upon where or how the caller was transferred to the contact center. The detailed reports generated from this exercise will help to quickly identify and provide clear direction for your next IVR enhancement and indicate the ROI for the development of adding the task in your automated IVR.

### **CUSTOMERS UNAWARE OF TASK FAILURE**

Your IVR system will fail if callers don't know they can do a certain task in the automated system. They call the 800 customer-service number, identify and authenticate themselves, and then hit zero in the main menu because they think they can't possibly complete their desired task in the automated system. Unless the customer service agent tells the caller that next time the task can be completed through the IVR, the caller will simply zero out each and every time they call for that specific task. These are the callers you can easily contain in the IVR — if only they knew their desired information could be obtained or task could be completed without an agent.

As part of the "to better direct your call" customer service menu, add choices for tasks that you suspect your callers do not know are available. For example, the transfer menu prompt might say: "To better direct your call, if your call is related to recent deposits, press one."

If recent deposits are available in the automated IVR, these are callers you can save immediately. Your customizable customer service menu should include choice selected prompts and submenus you can configure so callers pressing one will hear: "Did you know you can access all of your recent deposit information in our automated system? If that's not what you want, press one to speak to a customer service representative. Please stay on the line."

Again, this requires a flexible and dynamic customer service transfer menu. But it increases customer satisfaction while also increasing IVR utilization. Users get the information they need and you prevent low-cost calls from becoming more expensive ones.

### **IVR UTILIZATION TIP**

A customer service transfer menu can help prevent IVR system failures related to customers not knowing a task is available in the system.

## CUSTOMER TRUST FAILURE

Sometimes customers know the information they need is available through the IVR system, but they don't trust it. They simply want to confirm it with a live agent. Perhaps a caller has just made a transfer online and wants to confirm the new balance. He doesn't know or believe that the IVR system knows that the transfer was made. So the customer hits zero. He may be satisfied with the information he receives from the customer service agent. However, that call costs the company more than necessary, and the caller could have received the same information more efficiently by going through the IVR system.

For example, if the caller has selected an option "For calls related to your balance" the IVR prompt may say: "Did you know our automated service has the most current and updated information about deposits and transfers? To get your current balance, press one; or to continue to hold for the next available representative, please stay on the line."

Thus, callers learn that the information they'll get from a customer service agent is the same information they'll get from the IVR system.

## BONUS FAILURE

*Not Monitoring and Continually Improving  
the IVR System for Better Utilization*

If your new IVR system is not achieving 80-85% utilization and you're not continually monitoring the system and tuning it for better utilization, you have an IVR failure on your hands. There's no reason to settle for less than optimum performance when incremental improvements in automation can save your company millions of dollars – even if you lack the expertise in house.

Managed IVR services in the cloud can offer additional operational and capital expenditure savings over traditional IVR systems. Not only are you automating customer service calls, but you are moving the basic operation and maintenance of the system off premises. You are letting the experts handle the system and because they are experts, they can also help you fine-tune the system for optimum IVR utilization.

### IVR UTILIZATION TIP

The answer to the IVR trust issue can also be solved with the customer service transfer menu. In effect, you want to tell users that they don't have to wait for a customer service agent because they can get the same information immediately through the IVR system.

### IVR UTILIZATION TIP

Few companies have the expertise in house to improve IVR system utilization. But that expertise can be had easily and cost effectively by choosing a cloud-based IVR.

Managed IVR services in the cloud can offer additional operational and capital expenditure savings over traditional IVR systems.





## CHAPTER 2

# Must-have Capabilities to Increase Sales with an IVR System

Upselling and cross selling techniques that transform your IVR system from an expenditure to a profit generator

Contact centers and interactive voice response (IVR) systems have historically been considered a necessary expense of doing business. At the same time, businesses understand the value of upselling and cross selling. For years companies have offered incentives to agents who successfully upsold or cross-sold. Unfortunately, this method of increasing sales is expensive.

Organizations are slowly realizing that there is a better way to take advantage of incoming service calls to increase sales with little or no expense. The secret of this underused strategy lies in your automated IVR system. Using sales leveraging within an IVR application can increase sales and turn your IVR system into a profit generator. In this chapter, we introduce five sales leveraging techniques. As you evaluate IVR systems, ask the providers how these techniques can be implemented within their technologies.



## INTRODUCTION TO SALES LEVERAGING

Companies are always looking for new ways to grow sales. But, they need to be efficient about it. For example, mailing post cards or sending e-mails to potential customers can be a costly endeavor with little or no return. Unless a recipient has a need of your product or service at the time of your outreach, it is likely to end up in the trash. Sales leveraging is a more efficient option.

IVR sales leveraging entails using your IVR system to cross-sell customers into other products/services or upsell them in their current product/service. Sales leveraging via an IVR system automatically puts sales offers in front of customer service callers. This is an effective way to increase your sales because customers are receptive to your pitch. They are coming to you with a need that they feel you can address, and they are ready to engage with your company. Cross- and up-selling to these customers via sales leveraging comes at little or no additional cost because customer service calls are already automated through an IVR system.

You can compare sales leveraging via an IVR system to a company website that displays advertising for products other than those the visitor has already purchased or subscribed to. Perhaps the customer of a communications service provider goes to the company's website to request another cable TV connection in his home. This is an opportunity to promote upgraded movie or sports packages to that customer via a banner ad, for example. Sales leveraging via an IVR system works similarly.

By increasing sales in this manner, sales leveraging transforms the IVR system from a cost center to a profit center. The return on investment (ROI) for the IVR system increases.

As an added bonus to increasing revenue, sales leveraging enables organizations to gather additional data about their customers. The IVR system can track which customers heard which offers, and whether the offers were accepted or rejected. With this information, the organization can deliver future promotions that are better tailored to the customer's needs and more likely to result in a sale.

Given the benefits of IVR sales leveraging and the competitiveness of today's marketplace, it really is a no-brainer for increasing sales. Let's look at some specific sales leveraging techniques that you should look for in your next IVR system.

When a major, US-based department store with more than 900 retail stores throughout the country introduced sales leveraging on its credit card activation 800-number, it experienced a 10% IVR acceptance rate increase in the products offered.

## SALES LEVERAGING TECHNIQUES



### THE BYPASS OFFER

A bypass offer is a sales leveraging technique that involves bypassing the IVR system and sending the caller directly to an available customer service agent. If the caller's profile matches that defined by the organization as being targeted for a specific offer and there is a customer service sales agent available, then the caller is sent directly to that agent.

#### For Example...

A financial services company temporarily lowers the interest rates on new student loans. The organization can look at caller profiles, determine which customers have children of college age, and when these customers call the organization, present the offer to them in bypass mode. When the customer calls in, he is directed to a customer service agent who first addresses the customer's request, then presents the student loan offer. The customer is only bypassed for an offer once. He will not be presented the offer again regardless of whether he chose to apply for the discounted student loan.

*Bypass offers benefit both the selling organization and the customer.*

The customer receives immediate and personal service from an agent, thereby improving his service experience. The ability to talk to the customer and build a rapport with him offers the agent a natural segue into the sales offer, improving the chances of a cross-sell or upsell.



### THE SCRIPTABLE OFFER

A scriptable offer is similar to a bypass offer in that the organization has identified a customer profile that qualifies for a specific offer. In this case, the offer is recorded and presented through the normal IVR interactions with the caller. The caller authenticates and a dynamic scriptable offer menu is played based on the customer's profile. The caller is typically prompted to accept or decline the scriptable offer. Options for more details on the offer can be made available prior to the accept/decline option. Detailed reports can be generated to inform the company which customers accepted the scriptable offer.

#### For Example...

An insurance company might use a scriptable offer to cross-sell insurance policies. Perhaps the customer has automobile insurance, but doesn't have a life or home insurance policy through this same company. When the customer calls, a scriptable offer for one of these other insurance policies may be presented.

## A GLOSSARY OF SALES LEVERAGING TERMS AND TECHNIQUES

### Sales Leveraging

Using an IVR system to cross-sell customers into other products/services or upsell them in their current product/service.

### Sales Palette

A set of offers for which a specific customer qualifies.

### Bypass Offer

Bypassing the IVR system and sending the caller directly to an available customer service agent when the caller meets certain criteria.

### Profiling

Targeting offers to customers based on certain criteria.

### Routable Offer

Playing a recorded offer to a caller when he opts out of the IVR system and requests an operator.

### Sales Teaser

Presenting a promotional message to every caller via an IVR system.

### Scriptable Offer

Presenting a recorded offer to callers through an IVR system.

Because it is automated within the IVR system, a scriptable offer reduces the cost of a cross- or up-sell. The organization already has an engaged caller and can present an offer within the context of the call. Presenting callers with one-time offers is a powerful sales leveraging technique. The IVR keeps track of what the caller is being presented so the customer is not forced to listen to the same offers each time. This all contributes to an improved customer service experience.



### THE SALES TEASER

Sales teasers are promotional messages that are played to every caller. The IVR system may or may not track who heard the messages based on where they are embedded in the call flow.

If the message plays after the caller identifies and authenticates himself, then the system can track callers who have heard the message and prevent them from hearing it again. Typically, no action is required by the caller to accept or reject the promotion, nor is he sent to an agent.

Sales teasers are a great opportunity for organizations to share important news or other information that may not otherwise be effectively communicated. Utility companies often include safety information with their billing statements, but have no way of knowing whether customers have read the literature. IVR sales teasers offer a way to present the information when the customer is receptive and provide the ability for businesses to know who has heard the message.

#### For Example...

A utility company may remind users that the Spring planting season is around the corner, but before digging, they should call a certain number to ensure that they won't hit any utility lines.



### THE ROUTABLE OFFER

A routable offer is a sales leveraging technique that is played to a caller when he opts out of the IVR system and requests an operator. If the caller is eligible, he is offered a product or service, and sent to a sales agent instead of a customer service agent. The routable offer can be played every time the customer calls, or the offer can be tracked by authentication and presented a specified number of times per caller.

#### For Example...

A technology company may offer consumers an extended warranty on their recent purchase when they call customer service and request an operator.



Addressing a customer issue via a live agent can be more costly than addressing that same issue through an IVR system. When a customer who is interested in a product chooses to speak to an agent, the organization can get the most out of that expense by presenting the caller with a service or product sale via the IVR system prior to connecting the caller to a sales agent. When the IVR system presents an offer before the call connects to a live agent, it saves the agent time and allows the caller to be connected to the appropriate sales agent.



### CUSTOMER PROFILING

Profiling is a sales leveraging technique that targets offers to customers based on certain criteria. The organization creates a customer profile for a specific offer and the IVR system queries the database for the data when a caller authenticates.

#### For Example...

A banking customer calls and authenticates. The IVR system checks the caller's checking account balance. If the balance is below a threshold (established within the profile) then the customer is not presented with an offer. If, however, the customer is over a threshold, perhaps he is offered a low interest rate on a new auto loan.

Profiling provides flexibility and ensures that the right customers are given the right offer at the right time. And the more targeted an offer is, the higher the likelihood of a sale. As in the example above, it also ensures that high-risk customers are not presented with an offer, thereby reducing the cost of such customers. Similar to the routable and scriptable offers, an IVR sales leveraging system tracks who hears, accepts and declines each specific offer so that repeat callers are not presented with the same offer twice.

### SALES LEVERAGING BEST PRACTICES

When sales leveraging is done correctly, it benefits both your business and your customers. For example, you must track offers and callers. Tracking the offers presented, offers accepted and offers declined is a fundamental requirement for IVR sales leveraging. It allows you to make educated decisions about future offers while providing an enhanced customer experience. It also prevents you from wasting sales opportunities by presenting offers that have already been rejected, and it allows you to hone future offers that are more likely to be accepted. This data also allows you to measure your IVR sales leveraging success and quantifies how your IVR system is operating as a profit center.

A sales palette is also an important part of IVR sales leveraging. A sales palette is a matrix of offers for which a customer currently qualifies. At a given time, an organization can have any combination of offers running in its IVR sales leveraging system. For example, it may have three scriptable offers, two routable offers and two bypass offers. But customer Jim Smith may not qualify for all of those. His unique sales palette indicates which offers he qualifies for and in which priority they should be offered. The IVR system intelligently selects the right offer to present to a customer based on the sales palette, and once that offer is satisfied, the IVR moves on to the next one.

Sales leveraging does not have to be static. You should change offers as frequently as business needs change, like when new products or services become available, or prices or rates come down on products and services.

The goal of IVR sales leveraging is to provide offers that are relevant, timely and not repetitive. The IVR system should be able to track and throttle offers to each individual caller, so repeat callers are only provided a sales offer once every few calls or days, configurable by your business requirements. The IVR system should allow you to control where, in the call flow, specific offers are presented and the criteria under which they are presented.

Implementing sales leveraging techniques and best practices can be difficult without dedicated personnel and IVR systems that can accommodate sales leveraging techniques. But there is no need for organizations to do it on their own. Hosted service providers can work with organizations to implement sales leveraging techniques and best practices. With a trusted partner doing the work on the backend, organizations are able to respond quickly to changing business requirements and rest assured that they are reaping the full benefits of sales leveraging.



## CHAPTER 3

# Advancements in IVR and Digital Self-Service

### Features that transform an IVR system into a powerful customer engagement tool

Your new IVR system should not become the bane of everyone's existence. As the backbone of your contact center, your IVR system should facilitate customer service efforts – making it easier for agents to help customers and for customers to help themselves.

Thanks to the cloud and advances in IVR technology, organizations and their customers no longer have to settle for inflexible and difficult-to-manage IVR systems. In fact, when fully leveraged, today's IVR systems can serve as powerful tools for customer engagement.

Here are seven advanced features that can transform an IVR system into something you—and your customers—will love. Make them a must-have for your next IVR system.

#### ANI IDENTIFICATION/AUTHENTICATION

Identifying and authenticating callers are important first steps to starting a call, but they can easily aggravate callers if not handled efficiently. Caller ID by Automated Number Identification (ANI) can provide quick access to account information by accelerating the caller identification and/or authentication processes. Callers that can be identified with ANI have a 3-5% increase in IVR utilization because of the shortened path to authentication in the IVR. Some IVR



applications can track repeat callers and offer them the ability to update their account profile in your CRM. The result is increased ANI MATCH rates in the IVR, which increases your IVR containment. It creates a better experience for your caller while providing your business with the latest customer contact information.

IVRs can further benefit from Positive ANI Signature functionality, which tracks caller patterns over time. Additionally, this capability captures phone number, network signature and other attributes and calculates whether a call and signature can be trusted. Trusted callers will have a faster and easier identification and authentication process in the IVR. They can also be given access to high risk transactions in the IVR without requiring additional identification. Furthermore, the calls, if transferred to the contact center, can have the same shortened authentication process at the agent desktop.

### **SPEECH AND CONVERSATIONAL IVR**

Virtually everyone has had a bad experience using a speech-only IVR application. The system doesn't recognize your request or misinterprets your speech. But speech functionality has come a long way in the past 10 years, and it's a good thing, because the proliferation of mobile phones has made touchtone-only IVR applications equally frustrating.

We have found that transitioning a touchtone or speech application to a "Speech only" or "Natural language with speech only" application results in an 8-10% reduction in IVR utilization. That means up to 10% of callers are opting out of the IVR system to speak directly to a customer service agent. These customers are typically calling from an environment where background noise prevents the IVR system from working effectively or where the customer would prefer not to speak out loud to the IVR.

A unique feature called "Speech Transitioning" addresses the challenges associated with speech and mobile devices. Speech Transitioning dynamically reacts to the caller's speech success/failure at each menu and transitions the caller from "Speech Expert" mode all the way down to "Touchtone Only" mode with several modes in between.

As callers successfully respond to the IVR, they are transitioned up the speech mode ladder. Today's IVR application can provide Natural Language, Directed Speech, Press or Say, or just Touchtone functionality. The choice is up to you.

Additionally, advances in Natural Language Understanding have greatly improved Conversational IVR. With Conversational IVR, callers can voice what they are calling about, in their own words, with greatly improved speech recognition accuracy. The tool gives businesses the ability to offer a more extensive self-service solution to their customers, along with the flexibility to automate more complex interactions.

In this day and age,  
using either touchtone  
or speech-only can result  
in frustrated customers  
and apologetic agents.

## Three Fundamental Ways to Personalize IVR Interactions

### PERSONAL GREETINGS

This methodology greets the caller after identification and authentication processes have been completed using static information. Greeting the caller by name, account status, the number of years he/she has been a customer or other options are all possibilities. For example, your IVR might say, "Thank you Mr. Smith for calling and being a valued Lawn Depot gold customer for the past eight years."

Personal Greetings like this can be configured to play based on a number of conditional combinations from static information returned from your CRM.

### PERSONAL ACCOUNT PROFILE

A customer's ever-changing personal account profile can also be used to personalize IVR interactions. Personalized messages can be configured to play for low balance or late payment warnings, special account offers, change of address or phone number inquiries, and more.

For example, a customer calls his bank to check on a deposit he made to a checking account that is carrying a high balance. This triggers an IVR sales opportunity. Before confirming the deposit, the IVR plays the following message: "Take advantage of our high-yield, two-year CD and enjoy an additional promotional quarter percent by signing up today."

Personalized promotions based on account profiles offer limitless possibilities for aligning the IVR system with business goals or simply increasing IVR utilization by reminding callers of self-service functionality available in the system.

### IVR TASK COMPLETION MESSAGES

Tracking callers over time and during their IVR interactions produces valuable information. Traditionally this information has only been available offline in reporting databases, or in CRM host applications with relevant account profile or transaction data. But that's no longer the case. Your IVR system can access this information and use it to personalize interactions in real time. Historical data and the caller's menu choices are tracked based on the caller's ANI and/or account number.

As an example, let's take a caller who makes a payment via the IVR and calls back within 24 hours. The IVR will know the payment task took place and can play a simple non-intrusive prompt: "Please note, if you've made a recent payment, it could take up to 24 hours to post to your account." The message is played at the start of the call, thereby providing the customer with the information they need.

## IVR PERSONALIZATION

Advanced IVR personalization functionality is a powerful way to improve customer satisfaction rates while reducing contact center costs. By increasing the caller's confidence in the information provided by the IVR, personalization reduces repeat calls and increases first call resolution. But realizing these benefits requires sophisticated personalization features that go beyond a formal greeting at the start of a call.

## OMNICHANNEL FUNCTIONALITY

The days of an IVR system operating as an expensive silo – a costly necessity – have passed. Today's IVR systems feature omnichannel functionality that enables your business to engage customers in other channels, blurring the lines between traditional IVR and digital self-service. Your IVR system can be used as the gateway to omnichannel introduction, customer sign-up and opt-ins, and drive interactions to the contact channels your business and customers prefer. Integrating IVR processes with text messaging, email and Web interactions can improve efficiencies and support your omnichannel strategies.

Consider a "One Call Pay and Confirm" process that can eliminate unnecessary and expensive callbacks by allowing a caller to make a payment, check their account balance and confirm receipt of payment, all in a single contact. Since most payments do not post immediately, One Call Pay and Confirm informs callers when they can expect their payment to be posted and offers the option to be notified via an SMS message when the payment is posted. This feature improves first-call resolution rates, because customers do not need to call back to confirm that a payment has posted. These common tasks are proactively addressed outside of the IVR system. Because the company anticipates the customer's needs, One Call Pay and Confirm also improves customer satisfaction.

## VISUAL IVR

With the ubiquity of smart phones, Visual IVR is becoming a must-have in the self-service mix. Visual IVR is a mobile engagement solution that replicates IVR menus, prompts, flows and rules in a graphical format that is easy to use. The tool offers callers the ability to perform self-service tasks using SMS (text) and mobile web applications. The platform sends text messages with a personalized URL which allows customers to open a web page and enter the required information, without going through additional ID/authentication steps. Since Visual IVR is a true, multi-modal omnichannel platform, the caller can still interact with the IVR while in a mobile session.

Your IVR system can be used as the gateway to omnichannel introduction, customer sign-up and opt-ins, and drive those interactions to the contact channels your business and customers prefer.



## CHATBOTS

Another digital self-service capability that is starting to receive widespread adoption is Chatbot. Chatbots, also referred to as Virtual Assistants, go beyond IVR self-service to function as true digital agents. Leveraging Artificial Intelligence (AI), Chatbots perform a myriad of duties, including addressing FAQs, sales, technical support and customer service. The human-like experience provided by Chatbots increases customer engagement and satisfaction, while avoiding the cost of live agent interactions.

## REPORTING AND METRICS

Improving IVR utilization and call containment can reduce contact center costs. But in order to make the appropriate changes in your IVR, you need to know the details of when and where callers are transferring to agents or ending their calls. A modern IVR reporting tool can provide this visibility.

Some IVR reporting tools allow you to pattern caller behavior in your IVR. An IVR provides all the raw data, and the tool makes it available with full conditional drill-down and detail call traces. Such a tool can identify containment opportunities and allow you to select pre-determined filters to categorize IVR call types. Some tools also allow you to request recordings so you can "listen" to your customers interact with your IVR. By filtering and selecting drill-down criteria, you can listen to just the callers that are struggling.

## PUTTING THESE FEATURES TO WORK FOR YOU

Should you use Conversational IVR, Directed Speech or Press or Say? How many choices on a menu are too many? When should you prompt a caller to enter a terminating # sign for multi-digit menus? When is it time to expand IVR to Chatbots and other digital self-service techniques? If you cannot answer these questions without hesitation then you should work with a professional team of IVR experts that can help you determine the answers and will host your system.

A cloud-based IVR services provider can design and build an IVR system that meets your business requirements. But be wary of vendors who are new to the cloud. Critical IVR applications require operations to be scalable, flexible and, most importantly, available. So don't use an IVR vendor that is just learning to provide hosted services, or the hosted services vendor that does IVR as a side business. Choose a provider that has proven success delivering carrier-grade services.



## CHAPTER 4

### Conclusion

It is our hope that by reading this guide, your expectations for what an IVR system can do and what it can enable in your business have dramatically changed. We intentionally set the bar high because at USAN we know that we can not only meet those expectations but continually exceed them.

At USAN, IVR is our expertise. We have been developing complex IVR applications and hosting IVR systems in the cloud for over 25 years. During that time we have designed, written and deployed complex IVR call flows and processed high quantity call volumes in virtually every vertical market for the most demanding customers.

Our IVR team works with your business owners, IT groups and marketing teams to design and build a world class IVR. The key to success is our years of IVR experience matched with your business goals and customer requirements to create a flexible IVR that you can control and monitor, and can grow with your changing business. We provide detailed documentation of your IVR to ensure timely development and future maintenance. To learn more about how USAN can help you, visit us at [www.usan.com/products/metaphor-ivr](http://www.usan.com/products/metaphor-ivr) or call us at (770) 729-1449.



## About USAN

USAN helps companies profitably engage customers and deliver amazing omnichannel experiences with the industry's best cloud and hybrid customer engagement solution. From traditional telephone interactions to web-based communications including chat, email and SMS, USAN's portfolio of contact center applications gives businesses infinite flexibility in the way they engage customers across channels.

In addition to hosted ACD, IVR, WFM, Quality Management and Agent Desktop, USAN offers back-office integration and business process automation powered by a sophisticated omnichannel rules and workflow engine. All built upon a fifth-generation, carrier-grade infrastructure that delivers the highest availability in the industry, with proven scalability to support the largest enterprises.



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