Roundtable: IVR and Self-Service Best Practices

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IVR BEST PRACTICES

Tom Lewis
CEO, SmartAction
SPEAKER PROFILE

Tom Lewis

- 25 years of Customer Service Experience
- Leader of Deloitte’s Contact Center Advisory Practice
- CEO of SmartAction
Contact Center Challenges & Priorities Survey Findings
– Contact Center Pipeline Report 2016

**TOP CHALLENGES**
- High attrition
- Lack of/poor collaboration
- Insufficient self service (IVR, ...)
- Inability to achieve service level...
- Lack of or poor desktop tools
- High absence rate

**TOP PRIORITIES**
- Improve performance...
- Improve training
- Improve reporting & analytics
- Redesign / improve/automate...
- Improve knowledge...
- Implement /improve...

Challenges & Priorities aren’t aligned
“Customers today start a conversation more demanding and frustrated than ever before. This is causing our Live Agents significantly more stress.”

Chief Innovation Officer, Tier 1 BPO with 50,000+ Live Agents
About half of customers call when their issue is not resolved quickly.

Want to Self Serve:
- 57% Begin Online
- 35% Use The Phone
- 8% In Person

Issue Resolution:
- 41% FAQ
- 15% Live Chat
- 6% Email
- 3% Social Media

About half of customers call when their issue is not resolved quickly.

SmartAction: Automating Calls. Intelligently.
IVR BEST PRACTICES

AI AND MACHINE LEARNING

PERSONALIZED EXPERIENCE

NATURAL LANGUAGE
IVR BEST PRACTICES

CONVERSATIONAL

ADVANCED ASR

ONGOING TUNING
Fewer People
Simple, redundant calls are all handled by technology

A More Valuable Call Center Agent
Agents can focus on more important calls & customer retention

A More Efficient Call Center
With a mix of technology and top agents operation run smooth

Costs Decrease, Margins Increase
Less agents equal lower overhead

Customer Satisfaction Improves
Callers are able to complete transactions efficiently

Customer Loyalty
A happy customer is a loyal customer
Conventional Customer Service

**SIMPLE**

**MIDDLE TIER**

**COMPLEX**

**SELF SERVICE**
($)

**LIVE AGENTS**
($$$)

**AI-based Voice Self-Service**
($$$)

**LIVE AGENTS**
($$$)

Advanced IVR Solution

**PARADIGM SHIFT**
Poor Self-Service can have a negative impact on multiple areas of your contact center.

Implementing a best-of-breed IVR can address multiple top line contact center challenges.

Technology is quickly enabling an evolution in voice self-service.
AVOKE Analytics

IVR Best Practices

Rick Marvel
Director of Professional Services
April 19, 2016
IVR Functions

1. Identify a caller
2. Discern the reason for the call and route accordingly
3. Offer self-service where applicable
IVR Flow Example

Is Barge-in on?
Universal opt out?
No play rule?
Speech to DTMF?

Greeting
Language Menu / Monitoring Statement
Main Menu

Sales
Payment/Billing
Service
Something Else

Sales Agent
Sub Menu
Service Agent

Retries how many?
Max errors?
Application failure?
Network failure?

What are the answers to these questions for calls outside of business hours?
IVR Best Practices

• Are not universal to all business types
  – From the customer’s POV, yes they are

• What do we mean?
  – Some practices are unique to certain industries
  – Your customers don’t just call your industry
BP 1: When to allow Barge-In

• If the caller wants to begin to respond to the prompt before it is finished, let them
• Or communicate to callers that they need to wait so they know not to expect a response
BP 2: Let Customers Skip to an Agent

- List an option to skip the IVR (after ID)
  - There are customers who will only speak to an agent
  - This option should be provided with the beginning menu options
  - “Zero out” option?
BP 3: Maintain Information Flow

- Track the information gathered in the IVR
- Speed up the process and make it more efficient
- Customer perception of the experience degrades from having to repeat information
  – Impacts C-SAT, NPS, & CES
BP 4: Allow your callers time

• Give the callers time to respond
  – At main menus, short amounts of time are good
  – Sub-menus lengthen the wait for a response by 1 sec

• Caller is speaking or keying
  – Have the IVR wait until they are done

• Complicated business
  – Expect the caller to have to think rather than react to what the IVR is saying
BP 5: Limit Wait Time Messages

• Here’s your estimated wait time
• Then every 3.5 minutes they have an additional message:
  – You’re call is important to us, please continue to hold
  – 50% of callers were hanging up after that message

Please continue to hold
Thank you for holding..
Your estimated wait time is..
Please wait for our next available agent
IVR Check List

- Opt-out options are what?
- Maximum retries are set to?
- Error out to agent occurs when?
- Barge-in is set how and where?
- Queues are blind or transparent?
- Do I know the queue experience?
- Information being passed to agents?
- What self service applications are there? Success %?
- QA the IVR regularly, even when things appear smooth
Recommendations

- IVR’s need to be tuned up periodically
  - Voice systems, need voice tuning
  - DTMF systems, question tuning
- Regularly review and evaluate your IVR
  - Are callers hanging up in your IVR?
  - Consider tweaking the layout and options
- Testing – Have someone call production
  - Scripts are good for testing (have a variety)
  - Off script sheds new light
✓ End-to-end insight
✓ Automatic categorization & trending
✓ Jump to interesting calls & events within calls
✓ Observe real customer behavior & experience
✓ Listen inside the IVR, agents, partners, all transfers
Make Your IVR Digital

Roundtable: Best Practices IVR and Self-Service

Daniel Hong
Sr Dir Product Mktg Strategy
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April 19, 2016
Engineering the right customer journey

Where does IVR fit?

Smart phones (digital)

Moments (interactions)

Context (remember)

Omnichannel (journey)

Know me (intent)
Make IVR web-aware

Preserve context and presence to enable customers to complete journeys in their preferred channel

Customer starts on web

Customer then escalates to IVR

Presence makes IVR web-aware

Multi-modal and visual experience

touch
visual
voice

64%  63%
on both (website or mobile app)
User calls 800 number

“I see that you are calling about some charges on your current bill.”

“yes”

“It looks like you’re currently on our website. Would you like to review your charges on the website?”

“yes”

“Ok go ahead and navigate back to the website, already open in your browser and a ‘review charges window’ will pop up.”
Thanks for calling United.com support
Welcome back, Daniel
I see that you were recently on United.com and tried to book flights from San Francisco to Mahe Island. Would you like to speak to an agent about that trip?

Yes!
Ok. Please hold while I transfer you to an agent who can assist you.

Agent handle time and IVR time decreases

85% proactive offers accepted

CSAT improvement
Give visual capabilities to IVR

IVR becomes a voice and visual mobile web experience

Customer calls IVR → Speech only → Multi-modal, visual

Voice, visual, touch
Case study – global financial services leader

- **$12M** Annual savings due to call deflection, fraud loss prevention
- **86%** Smartphone users accepted multimodal invitation
- **92%** Success Rate
- **87%** Rated experience 4 or 5 stars
Leverage the same Natural Language technology across channels

- **IVR**
  - Understand intent
  - Route to live agent
  - Provide self-service
- **Virtual Agent**
  - One intent model
  - Shared app logic
  - Best channeling
- **Voice Agent**
- **Chat Agent**

Siloed: Build better, deploy less
Case study – global financial services leader
Give your IVR digital roots and capabilities

Improving the experience, shorten the journey, and save customers’ time

- Web-aware
- Visual and Multi-modal
- Single Omnichannel Natural Language
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Best Practices
Q&A

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