The IVR Survey Advantage:

The Benefits of Immediate Customer Feedback

Over the years, organizations have spent a great deal of time and money garnering customer feedback for the purposes of improving customer service and assessing the viability of new products, services and promotions. Historically, much of this surveying took place by either mail or telephone - each with significant disadvantages. However, with IVR surveying, many of the shortcomings plaguing mail and telephone surveys can be overcome. And with the new IVR technologies, discussed later, a new level of assessing the customer experience can be achieved.

For readers who already fully understand the advantages and disadvantages of different survey tools, we encourage the reader to skip to the section of this white paper (New IVR Survey Technology: Enhancing Customer Experience Assessment) that discusses the attributes of the latest IVR survey technology advancements.

The Mail Survey

The mail survey is often the most leveraged survey method deployed by companies. The challenge with this survey vehicle is that the average mail survey costs approximately $5 per piece. While many organizations can afford to get small quarterly samples for customer satisfaction trending, this vehicle is cost prohibitive in obtaining reliable agent level customer feedback reporting. For instance, assume that we want to have a sample of 10 completed customer surveys per agent per quarter to provide a reasonable average score. Given a 15 percent response rate, typical of most mail surveys, we would need to send out 67 surveys per agent just to achieve this quarterly goal. For a contact center of 100 agents, this would require mailing 6,700 surveys per quarter or 26,800 surveys per year. At $5 per survey, the annual cost would approach $135,000 – a prohibitive cost for most contact centers.

Additionally, mail surveys do not provide timely information. They often take 1 week to send out after verification that the customer called the contact center. Add another week for mail time to the recipient, add another 2 weeks until the survey is received back from the customer including return mail time, add the time it takes to sort and scan the completed surveys when they are received…. and organizations are literally waiting at least a month before they can report on the survey results.

This delay has another significant disadvantage. Assuming the customer does not see the survey typically until at least a week after the transaction, the survey respondent can provide a fairly reliable overall satisfaction rating – it is not difficult to recall whether the call went very well or very poorly, but all those other details? (e.g., "Did the agent thank you for calling?", "Did the service representative ask you about other products or services you might be interested in?"). Since the transaction occurred several weeks prior to the customer receiving and answering the mail survey, it is not surprising that due to the fallibility of memory, many of the ratings regarding the agent's performance on specific tasks are quite unreliable.

What's more, up to 22% of inquiries in the call center take more than one call to resolve or are handled by multiple agents such as with dial transfers[1]. So if a company sends a survey to the customer and asks how well the agent performed, which agent is the customer expected to assess? The first agent they talked to? The second?

In conclusion, the ability of mail surveys to obtain reliable customer satisfaction metrics on specific call attributes is questionable. In addition, the cost to obtain agent level customer feedback is prohibitive, and the delay in obtaining customer feedback is less than desirable.

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1 Purdue Call Center Benchmark Study

The Phone Survey

The phone survey overcomes some of the shortcomings of the mail survey, but remains a costly and somewhat intrusive survey vehicle. One advantage over mail surveys is that the latency time between when the transaction occurred and when customer feedback is received can be better controlled. For instance, a survey call to a customer could happen on the same day that the customer contacted the call center. This would allow for timely feedback reporting and would minimize recall issues plagued by mail surveys. However, contacting the customer on the same day after the transaction is not practical for most organizations. Lastly, the cost for the telephone survey is many times more than the mail survey due to the labor costs incurred by having personnel contact customers by phone.

In addition to the cost disadvantages, the telephone survey is a rather intrusive form of surveying since customers are not always receptive to being contacted at home. In addition, with consumer call blocking technology, it has been increasingly more difficult for businesses to reach the consumer.

IVR Surveying

Many companies have chosen to limit or discontinue the use of phone and mail surveys opting instead to leverage IVR surveying technology. Often referred to as "after call" surveys, these systems prompt customers, while waiting in queue, to agree to participate in an after call survey. Upon the agent hanging up, the customer is immediately transferred to the automated survey system where an IVR script provides the questions and the customer responds by pushing the appropriate key on their phone pad. This survey type is ideal for measuring customer satisfaction and providing market research information.

IVR survey systems when leveraged fully, can be more cost effective than mail or telephone surveys. While an initial up-front investment is made to purchase the technology, there are no ongoing or additional expenses regardless of the volume of surveying conducted. Therefore, organizations that desire more robust, higher volume surveying are not constrained.

Apart from being more cost-effective, IVR surveying has several other advantages over traditional mail and telephone surveys. IVR survey results are immediately available and a large volume of surveying can be done in a short period of time. Therefore, it is possible to provide customer satisfaction scores for a team or the entire organization even on a daily basis which neither mail nor telephone surveys can achieve. Additionally, since customers provide their feedback immediately after the call, the transaction is "fresh" in their minds so even very specific questions about the transaction, or the agent's performance, can be rated more accurately and reliably.

IVR Best Practices

Despite the many advantages of IVR surveying over mail and telephone surveys, executing successful IVR surveying campaigns take more forethought than just plugging in the technology.

Many companies have implemented IVR surveys and have found key practices that made them even more effectual. Companies have found IVR surveys to be highly successful when they contain a small set of questions and when the customer is informed of an estimated time to complete the survey, prior to taking it. Experience has shown that as surveys get longer, response rates can suffer. This result should not be surprising. Customers call contact centers because they wish to have their inquiry answered and resolved promptly -- the purpose of their call is not to provide the call center with feedback regarding products and services. So it is key to keep the IVR survey to a manageable length.

Other best practices include the evaluation of low survey ratings. Low ratings can identify downstream process breakdowns, agent servicing issues, even issues with existing products and services. Due to the best practice that IVR surveys should be relatively short so as not to increase survey abandon rates, there need to be other methods to identify the "root causes" of the low ratings without adding significantly to the length of the survey. In fact, some companies try to resolve this issue by calling dissatisfied survey respondents to request that they provide more detail on what led to their low ratings – greatly increasing costs and "hassling" survey respondents. With the latest IVR survey technology however, this is no longer required.

So how can latest IVR survey technology help to identify root causes for low ratings without adding significantly to the survey length or requiring follow-up calls to survey respondents?

The Latest IVR Survey Technology: Enhancing Customer Experience Assessment

What if you could actually auto-link IVR feedback results with the actual customer/agent call recording and allow customers to add voice comments at the end of the IVR survey itself? How would these features add value and resolve some of the issues previously discussed?

As mentioned earlier, when trying to get more detail behind low ratings, it is not practical to add significantly to survey length and risk higher survey abandon rates. Nor is it practical to conduct follow-up calls to survey respondents with low ratings. But with the latest IVR technology you can point and click on any of the low ratings in the IVR report and immediately hear what transpired on the agent/customer call. For most intents and purposes, all the information on what led to the low rating can be garnered from listening to the call recording itself. This feature is a perfect feature to identify process breakdowns. Also, by having the survey and the call recording auto-linked, there is never any confusion about which agent the customer was assessing.

What's more, with latest IVR survey technology, survey respondents can be prompted to add voice comments during the IVR survey – giving them ample opportunity to justify their ratings or provide additional comments and suggestions.

Implementing Multiple Survey Programs Simultaneously: How Can The Latest IVR Survey Technology Help?

Organizations often have surveys that perform different functions. For instance, some IVR surveys are "short and sweet" and are used to provide a daily or weekly customer satisfaction score. The primary function of this "real time" survey reporting is to give regular performance benchmarks with trending for motivational purposes – not for the purpose of identifying process breakdowns or conduct "root cause" analysis. In this scenario, setting up a simple IVR survey with one or two questions is often all that is needed. For example, two common questions like "On a scale of 1to 10, where 10 is the highest score and 1 is the lowest, how satisfied were you with the customer service you received?" and "How many inquiries did it take to resolve your issue - 1 inquiry only, 2, 3, 4, or more than 4 inquiries?" This quick survey would give both a general customer satisfaction rating and a first contact resolution score. Also, because the survey contains only two questions, response rates are likely to be high enough to provide an adequate pool of completed surveys to ensure a reliable daily average customer feedback score.

The other survey type is more expansive. This is a survey that may have as many as 10 to 15 questions. Also, due to the fact that longer IVR surveys result in a higher survey abandon rate, the survey will likely need to be "active" in the system for many weeks until enough sample is garnered. The goal of this survey type is not to garner "daily" scores, but to provide tactical and strategic information to 1) ensure process improvement by identifying downstream process breakdowns, 2) capture consumer preferences on products/promotions to guide marketing and sales strategy or 3) evaluate agent performance to identify knowledge and skill gaps to be addressed with coaching or training.

The challenge is managing these two survey types simultaneously. That is, to conduct short surveys with only 1 or 2 questions for daily/weekly trending and broader surveys requiring a longer period of time to obtain adequate sample size. With the new IVR survey technology, this issue is no longer a problem. The latest IVR survey tools allow users to launch and manage multiple IVR survey programs simultaneously.

Greater Administrative Control for Better Survey Sampling

One of the shortcomings of not using the most up to date IVR survey technology is that historically these systems required the agent's intervention to transfer the customer to the IVR survey system. This limitation makes the survey process vulnerable to bias. For example, in some instances, agents may be reluctant to forward a clearly dissatisfied customer to the IVR survey system, especially if the IVR feedback is used for incentive programs that directly benefit the agent. Also, agents may be unlikely to recommend an after call survey to an angry customer – fearing requesting anything additional from the customer would generate additional wrath. However, the new IVR survey systems allow greater control.

The latest IVR survey systems afford the organization with the flexibility to permit the system or the agent to prompt the customer to complete the after call survey. For instance, the new systems permit the caller to be prompted by an IVR script to take an after call survey while in queue. The customer simply presses their phone pad to confirm acceptance. Also, the prompt language can be modified in any way, even to include incentives or special offers to motivate the customer to complete the survey to bolster response rates (e.g., store credit, bonus points etc.).

With the introduction of new IVR survey tools, IVR surveying has never been so cost-effective and powerful. Companies exploring alternatives to mail and telephone surveys should take a serious look at IVR survey technology that has the latest features. When evaluating IVR surveying systems, remember to look for several key new functions: 1) the ability to point and click on any survey report to drill down to specific ratings and listen to the agent/customer call recording associated with the survey 2) the capability to automate the request and verification of the customer's participation in the after call survey while the customer waits in queue and 3) the capacity for customers to add voice annotations to the IVR survey to explain ratings and add additional comments/suggestions.

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customer experience management