

Building an IVR/VRU Self-Service Voice Solution on Your IBM i5/iSeries/AS400, Unix, ODBC Compliant Database

ODT VISION® for the **I5/ISERIES/AS400** is a revolutionary product that allows two-way telephone access to your **IBM I5/ISERIES/AS400** or **Micro Database**. With **ODT VISION®**, every touch-tone phone in the world becomes a remote terminal on your data. Although computer telephony systems have been available for a number of years, these systems have traditionally been expensive and not easily customized. The **ODT VISION®** addresses these issues by being the most versatile and inexpensive telephony solution available. Direct connectivity to the host or ODBC compliant databases in real time is not even an option for most other telephony systems. With **ODT VISION®**, not only is direct I5/ISERIES/AS400 telephony access a reality, but it comes with little or no modifications to your existing host display programs, application systems, or databases..

Is it an IVR or VRU?

These two acronyms are many times used synonymously. An "Interactive Voice Response" application interacts with the

user's input and a reciprocal action based on that touchtone or voice input is preformed. The user's input interacts with the data and the routine's logic. The actual unit is referred to as a "Voice Response Unit." The VRU actually performs the IVR process.

How can my company use the ODT VISION® System

Customers, employees or 3rd party business partners will now be able to place orders, check status, and verify information from remote sites even after hours. Employees can verify benefits, enter payroll information, or check messages from the road or the comfort of their own homes. Operators or support personnel can be notified of system problems or issues that need immediate attention via phone or text messages. These kinds of functions and many more can be provided 7 days a week, 24 hours a day without the high expense of live personnel. The use of an VRU will lower cost and improve customer service.



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Sample Applications

- Order Entry
- Transaction Confirmation
- Shipping Information
- Pricing Information
- Stock Availability
- Customer Inquiry
- Available Credit
- Warehouse & Logistics
- Employee Benefit Hotline
- Customer Response
- Automated System Operator (ACD)
- Automated Paging & E-mail Delivery
- Fax Back Systems
- Query Reports On Demand



A Self-Service Voice Solution is Defined by the User

Your users' needs will define your voice solution. Look at the functions that your current customer service department provides. This may be a combination of live customer service agents, self-service web/voice solutions, e-mail/fax systems, and batch file transfers. Start by grouping types of users and their respective needs. Now list the characteristics of these users and what methods would best fulfill their needs. Please keep in mind that the method the user desires may change as that user becomes mobile or if the action required is an emergency after hours. New CS applications may be implemented more expediently and at a lower cost through our IVR unit than through a web solution.

Connectivity to the Data

Your method of connectivity to the data and other devices may vary based on the user's application and the logic within the VRU's routine. As an example; off the general menu, items 1,2, and 3 are using a methodology of HILAPPI Screen Scrapping from a host application



It doesn't do any good to place an emergency order through a web order entry system. It will just go to the normal order queue. This order will not be fulfilled until Monday since the office is closed. This user needs the product or service ASAP. Your system needs to have the ability to match the client's requirements to go around your normal supply chain restrictions for this order.

screen program while menu item 4 goes through an ODBC dynamic link to a database found on a sequel server. Finally, general menu item 5 initiates a 3rd party program call to poll a production sensor type of device to provide today's production count.

Review Current Web Solutions

Examine your current web customer service solutions and realize that not all users have web access or may have periods each day where another form of self-service solution is required. You may also provide CS solutions through the VRU solution which are not available on the web. Some users may not speak English so the self-service IVR solution may need to be bi-lingual.



Output

Output may be spoken, faxed, e-mailed, or text-messaged to digital pagers or other devices. Besides activities which are initiated by the caller's input, the unit may take a proactive activity such as calling out or sending e-mails based on clock/date occurrence from our ODT VISION scheduling program or even if a certain threshold is reached on a connected system or device.

- At 8:00 each morning, we pull up a screen for over-due invoices and send notices to clients as a friendly reminder
- A control sensor which is now out-of-bounds causes the unit to send a notification through a call or e-mail
- An over-drawn checking account sends an e-mail notice to its owner

We have all done it before; dialed into a VRU which is more of an aggravation than a help. It is important in your design of this solution to review a few traits which will make the system more friendly and easier for its callers.

All Voice Solutions Should: Optimize Voice Prompts

The voice file prompts should be optimized. The voice file banner should stop playing once the caller inputs data. Secondly, the menu items should be sorted by order of most used preferences so item "1" is the menu option selected most frequently.

Allow a transfer out of IVR to live customer service representative

The number one complaint against some IVR systems is that they don't allow you to reach a live person. Always build an exit strategy. This is why the ODT VISION IVR has a setup screen which is used to determine if the office is open or closed.

Menu Problems

Either the menu is too complex with too many items for the user to understand or the user is now caught in a continuous loop. Use sub-menu and exit logic.

Golden Rule

Don't ever ask the caller something they don't know. If the user may not know their account number, ask for a phone number used in the account.

Log & Audit Trails

Build a log & audit trail to know who the system is being used by and to define what changes will improve the system.

In conclusion, a well thought design of your new IVR self-service solution will improve the usefulness of it to your organization. ■

Potpourri of Specialized Applications

This month's "Application In the Spotlight" article is the eight of an ongoing series called, "Potpourri of Specialized Applications." Frequently, a client will install the ODT VISION Voice Response Unit for a specific large application, but its ease-of-use and simple customization will later allow for new functions to be added that provide even greater customer service flexibility. Some of these applications have already been done at our clients' sites and some are in the planning stage.

Senior Citizen Outreach

A city would like to offer communication assistance to their senior citizen population that still live in their homes. This community outreach system will automatically have contact with those individuals either daily or as defined in their user profile.

The senior citizen can set up their profile as to the time of day and which days of each week they want to be contacted. In addition, these profiles contain emergency contact information and whether the individual has any medial conditions (i.e. Diabetes, stroke, etc.) which would trigger proactive activities if that individual has not had contact with the system in the proper time frame. This individual can also:

- Change their profile
- Suspend the Outreach System Activity if they are out of town, in the hospital, or not going to be home to receive the calls
- Contact the machine on a day where the Outreach System is to contact them. A call into the system in the morning will result in their call being skipped that day
- Request emergency services directly from the VRU



The senior citizen's record profile is updated to reflect all calls. If an individual has passed the threshold which is maintained within their record profile, the emergency contact individual is notified. (i.e. Call is placed and the unit speaks, Dear Mrs. Smith, we are unable to reach your mother, Mary Smith, We need to hear that she is ok. Press 1 if you know for a fact that everything is ok, Press 2 if you will check on her and call us back at 555-5555, or press 3 if you want us to check on her.) Certain medical conditions within the profile will trigger the city's emergency service personnel to visit their home immediately. In addition to the database record being updated automatically, complete logging is created to build an audit trail of all activities.



The call out progress is initiated from the ODT VISION scheduling program where the individuals who are to be contacted during the day and have not either turned off their profiles or have not contacted the unit are called at the preference time. If the unit is unable to verify the safety of the individual, the emergency contact person is contacted.

City and municipal entities are facing tight budget restraints, but that doesn't mean they don't want to provide community services to their valued long-term residents. By automating this through their IVR, the solution becomes affordable and the city can use its employees for tasks that require more intensive personal assistance. Citizens can also have greater control over their own profiles. ▣

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THINKING OUTSIDE THE BOX Get Your Own Demo Today

Go to www.ODTVISION.com to get your own demonstration of the ODT VISION Voice Response Unit which will run on any Windows based PC of Windows 98 or later with sound card and speakers. This is a simplistic order entry and shipment status system which is running off a Microsoft Access database. The demo is in the test mode and you will be using the "Test Phone" feature of the ODT VISION VRU to simulate a phone call to the data. Manuals and case studies are also available on the web site.

Improving Customer Service Affordability

Submit your technical questions or get free project analysis regarding your telephony application to:
TechSupport@ODTVISION.com
Or Call: 614-985-3814

Profile Options

Check Mark = Yes Mark or fill in Blue Areas

Select Contact Day

Sun

Mon

Tue

Wed

Thu

Fri

Sat

Answer Machine

Medical

Last_Contact

Call Response

Last Call

Call Attempt

Voice File Recorded

HOW DO THEY DO THAT? Flowchart for Senior Outreach Program

Senior Call out System

