

Ohio Data Transfer

THINKING OUTSIDE THE BOX IN CUSTOMER SERVICE

Warning, DO NOT LOAD THE NEW MICROSOFT EXPLORER 7.0 INTO YOUR ODT VISION UNIT. TURN OFF AUTOMATIC UPDATE SO IT WON'T LOAD AUTOMATICALLY!

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Defining Your User, Their Needs, and Their Applications is Paramount

It is so easy to get caught up in what the ODT VISION Voice Response Unit is and how it can help you address customer service, vendor communications and employee support. All firms and departments are looking at ways to provide greater customer service and to do it for less. There is a growing tendency for firms that may have been against this type of machine automation in the past, thinking that this is impersonal, to review their strategy. Most large enterprises now incorporate IVR solutions to optimize existing personnel. Call into your bank, cable company or firms like American Express and you will most like be talking to an IVR application which directs the call based on the caller's responses. **We will always be the first to tell you that not all users' requests can be handled by a VRU and sometimes a live representative is needed for the caller.** However, any call which is administered by the ODT VISION VRU will cost substantially less than a live person and it may even address that call quicker and in better fashion.

In order to design a truly functional IVR application, one must first define the different type of users and what requirements they have. It is always recommended that you work with the customer service department or whoever is currently working with these users to note what type of requirements each user type has, where that information is found, and what routine calls



can truly be addressed in the IVR solution. Forget about any preconceived notions as to what is needed. The ODT VISION VRU is an interface which is customized to provide the needed solutions, but we must know the user first. The associates that work daily addressing these users or the users themselves can define their needs. It is useful to create grocery lists defining these users, their needs, the systems currently in use and where the data comes from, as well as any characteristics which define the talking points of this future application.

General requirements for the User

- Friendly and easy to use by the caller
- Provides real-time information
- Provides interactive communication 24/7
- May provide automatic call distribution based on callers' responses and needs
- May allow call transfer to live customer service representative during office hours
- May provide delivery of hard copy documents via fax or e-mail
- May provide call out or e-mail support
- May provide emergency protocols for critical mass situations
- May provide store forward applications

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If Mary Jean is the director of customer service and has taken calls from your clients for the past fifth teen years, no one knows more about your customers than Mary Jean. She can tell you what normal customers' requests are routine and suited for the ODT VISION VRU. Our goals here are to optimize existing personnel, allow users to perform self-service functions after hours and improve the over all customer service functionality. Always start by defining the user. They may be different user types and each solution provided by the IVR will be defined by the type of user. An example of this is the insurance company that has three general type of users; the firm which supplies the insurance for its employees, the employees who have the insurance and the providers who are providing the medical procedures for those employees. Within each of these user types may also be sub-sets such as new employees/providers vs. existing callers who we are aware of from previous calls. The user type will define what menu options are open to them, what information the caller needs to supply and whether we need to immediately transfer this call out of the system to a live representative. The sophistication of the user may vary and they may immediately request a live customer service representative. It is a common trait for our senior citizens to not want to deal with an IVR application. Always allow a caller to press "0" or be transferred upon no input after the first request prompt. This exit strategy may also be required if the caller obtains information which needs further clarification or assistance. In a shipment status system, the user may find the order has not been shipped due to a credit hold and that individual needs assistance in paying an invoice, increasing their credit limit or working with a company



representatives to get this credit hold released.

One of the common user requirements we are seeing on many of our clients' VRUs is to support a foreign language such as Spanish. The ODT VISION routines can have a foreign language menu to support up to 10 different languages per unit. There is a noted problem with French in the system voice files as French speakers don't speak currency values in the same format as English. This variation of the French language can be overcome by adding the Text to Speech option to your ODT VISION VRU with a French TTS dictionary. You would then use the syntax within your customization script to speak currency for the French user with TTS vs. the normal "SpeakDollars" syntax we normally use to speak a currency variable value.

Making your Solution Friendly

The main rule of any IVR application is to never ask the caller something they don't know. If your user may not know their account number for the water bill, cross reference it to the home phone number which is tied to that account. You will also want to use

the same format throughout the routine, such as "0" always transfers out of the system to a live person. The menu options should always be under five, and if you have a greater logic for your option menu, use sub-menus. Always optimize you menu so the most widely used menu options are listed in order of selection. If 80% of your calls are for "Order Entry" then menu option 1 should be "Order Entry". This menu option optimization should also be seen in sub-menus so the flow of the call is most often to press 1. You should also

optimize the voice prompts, where the voice banner is terminated as soon as the caller enters anything. These things will make for a shorter caller and it will seem friendlier for the caller.

We will also work to minimize the information the caller needs to enter. If our unit has already obtained the account number during the call, it should never have to ask for that information again, even if the caller is using a different part of the system to do a different function. Nothing is more of an aggravation to a caller than to be asked for the same information twice. We may also use this information to obtain further profile values from a database about a caller without them having to enter it.

Security

Security and a sign on procedure is required in many applications. This is especially needed if the application is medical/insurance in nature where the requirements of HIPPA are in effect. This could be as simple as a cross-reference routine where the caller needs to enter an insured individual insurance number and then an authorization code. This may be a code supplied by the insurance policy company or perhaps something like the last four digits of the social security number assigned to that individual. Besides insuring that the caller requesting the information is allowed to access these medical records, it also insures that the correct record is recalled. This requirement to supply two variable string values will show in the log that this caller had the clearance to obtain this medical data.

In many applications, the CallerID provided during connection will identify the user and this can eliminate the need for the caller to sign on to our application if that CallerID can be cross-referenced to an account or individual user.

Menu prompts off the general menu may require additional security to lock out unauthorized users. We had a construction

company which was doing remote payroll entry using the ODT VISION VRU. If the caller took option 3 off of the general menu to do remote payroll entry, a manager ID and password were required. This prevents a user from posting additional hours to HR for his profile, but still allowed remote managers to post the crews' hours remotely to the corporate office.

Sometimes you may want to add to your application a random security check logic where each 1,000th-caller has to provide additional information. An example may be where the ODT VISION is used for hourly employees as a time clock. Normally the caller just has to supply his employee number to clock in/out, but, occasionally, an employee security code is requested or the caller has to say his name for verification. This will prevent an associate from clocking in or out for a fellow worker.



Other Methods of Output

A provider calling an insurance company may want output delivered via fax or e-mail of the status of all claims where they are the payee instead of talking with a live customer service representative and going over the status of each claim individually. Additionally, a user may be calling after hours with an emergency situation where the unit needs to contact an on-call support person to handle the problem that needs immediate attention. Further, the ODT VISION unit can bring up production screens and automatically generate e-mail notifications that the individual orders being custom built for a client are now going in to production and it can also take the estimated delivery date from those records and generating an e-mail to that customer as to when they can expect delivery.

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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

Get free project analysis regarding your telephony application or submit technical questions at:
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<http://www.developer.ibm.com/gsdod/solutiondetails.do?solutionId=25001&lc=en>

http://search400.techtarget.com/productsOfTheYearWinner/0,296407,sid3_gci1157611_tax302575_ayr2005,00.html

This type of automation is truly next generation customer service. The ODT VISION VRU can also call out to clients who have purchased home appliances as to when they can expect delivery. Finally, the ODT VISION can support your company's marketing department by having new users record their name, company name, address and call back phone number which is delivered to the marketing department so they can be contacted directly by a marketing representative.

In Conclusion, all these talking points of a your future IVR application have one thing in common; they are defined by the user and the user's needs. When defining you future self-service solutions, make sure the application fits the user. The best way to do that is to listen to the associates who currently support those users and once the new solution is in place, listen to the feedback of your users. ■

Working from An ODBC Link

The ODT VISION VRU can be connected interactively to any ODBC type of database through a dynamic link which is established from the ODT VISION.mdb and that database. The ODT VISION.mdb is a Microsoft Access type of container. Syntax is available to do such database functions such as open the table, close the table, seek (find) a table record based on conditions, edit that record, insert a record, or

delete a record. This link is established through the use of Access. A good rule of thumb is that if you can do it with Access to the external link table, you will be able to do it with the ODT VISION customization script. If you can not do it with Access, don't assume that you can do it with the ODT VISION syntax. This link must follow the rules of security which your LAN administrator has established.

A common issue many times when you are first working using this means of connectivity is that the value for the variable doesn't match the format of the record field within the records of the external table. We see this many times if the field we are working with is a date or time field. Another common error is if your database table design doesn't allow null values. Even if we are updating just certain record fields, a null value will be automatically supplied for the other records fields. ■

```

SeekDB CustomerFile, =, CustIn      ; Look for customer in the file
IF MatchDB Then                    ; If customer found.....
    EditDB CustomerFile             ; Allow changes to record
    CustomerFile.CallsToday = CustomerFile.CallsToday + 1
    UpdateDB CustomerFile           ; Update record
    CloseDB CustomerFile            ; Close the Table
Else ; If customer not found, tell user & loop back for next customer number
    Goto GetCustomerNumber
EndIf

OpenDB OrdersToday, *NONE
InsertDB OrdersToday               ; Add a new record
OrdersToday.Date = DATE            ; update any fields in the new record
OrdersToday.Customer = CustIn
OrdersToday.Item = ItemIn
OrdersToday.Qty = QtyIn
    
```