Vision Voice Vantage, Inc.

THINKING OUTSIDE THE BOX
IN CUSTOMER SERVICE

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It Was A Bad Monday For Customer Service

I would be the very first person to tell you that firms need to implement various versions of self-service customer service whether that is our own IVR solution, Web sites, Email support as well as the most expensive method to respond to a client's needs with live customer service representatives. But, it was **"JUST A BAD MONDAY FOR CUSTOMER SERVICE."** No one can argue with the need to lower the cost of customer service with these less expensive self-service methods to respond to client's questions and expediently address any concerns or needs for assistance but you need to acknowledge that not every call can be addressed through self-service. In additions, you need to make sure that the self-service function is actually doing what is needed.

At the start of my week on this Monday morning I generally do simple functions around the office since I believe most clients are busy starting their week and not in the mood to talk with a vendor. This day started with a simple task, going online to download a simple tax form from a federal governmental agency. It was simple enough to find the proper form but the problem arose that it could not be downloaded. I could down load a sample of what that form looks like but it required me to fill out a request form and the request would be sent to me in the mail. The PDF form that could be downloaded was marked as a sample and it was in a different color so it couldn't be used. The web site even noted that this form could not be used and a fine would be levied if used. This brings up one of my first pet peeves of a self-service solution,... that the self-service solution doesn't deliver on a timely basis what is needed. Pagers, cell phone, FedEx, faxes, and email have all brought about one general trend in the business environment, we all have the **"I NEED IT NOW, MENTALITY."** I filled out the form and realized I would have to wait 7-10 days for my request to be fulfilled but I thought, why not an instant response to my request and how expensive it is to mail to me what should have been able to be downloaded.

The next issue I worked on that morning was to reconcile my firm's bank account. During that process I found several erroneous transactions. The first group was

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regarding a major freight carrier that we have an account with where the transactions are automatically debited out of VVV's checking account. I called their billing department and was literally passed around where I felt like a ping pong ball. Each live customer service representative would tell me they saw the problem but were unable to address it and then would give me another 800 number to call as they didn't have the ability to transfer the call. Bottom line, there were three transactions that are being refunded but it took four calls and a bunch of time to achieve what should have been able to be accomplished with one call. The first CS representative should have identified what was needed and if they couldn't do that, transfer me to the individual that could.

Finally I had purchased some new PC software through the nation's most used auction web site and the payment was processed through the most used payment system tied to that process. A few days after the transaction was complete, I got a notice from the auction web site that this vendor was being removed and my funds would be refunded. Sure enough, the funds were given back to my account. In fact, this vendor debited the transaction payment account two days later and that was refunded automatically as well. The main issue here, there was another transaction on my payment account for $139.99 that wasn't mine. The auction site had no record of this purchase. I could download the payment system history of my payment system account and this transaction showed but the problem arose that there was no transaction number tied to this transaction. Now you would think this should be easy to resolve but here comes the real problem, Even though I knew the amount, date, and payee,….without the transaction number no one could help me. This started with me emailing the payment center to notify them that I had an issue. I was emailed back what was called a web identification code to use during the call to customer service. I called customer service, indentified myself with the web identification code and after answering some simple security questions, they knew who was on the phone. The first question, "What is the item transaction number?"...Answer…"I don't have it." Apparently the CS representative saw the same screen that I saw as he couldn't give me this transaction number but saw the transaction. He identified the payee which I already knew and finally gave me the 800 number to call that vendor. I now called that vendor who of course didn't know me by name or firm since we obviously didn't do business with them. The first question from this individual, "What is your transaction number"...which of course I didn't know. Since I didn't have this number...they couldn't help me and told me to go back to the pay service customer service. I did and they suggested a use their web remediation function but guess what, you can't complete this process unless you have the transaction number….and here we are….a continuous loop in customer service with no solution in site.

It is easy to design a self-service customer service solution as long as you assemble some simple rules and guidelines:

1. It must be easy to use, even by a first time user
2. It must address the client's needs and if the self-service solution cannot, transfer to a method that can perform the required function or instruct the user what they can do to get a solution
3. It must deliver real-time information that is accurate
4. You should build of log of how the self-service solution is used so it can be revised to better serve its users
5. You should build an audit trail of any collected data as a backup

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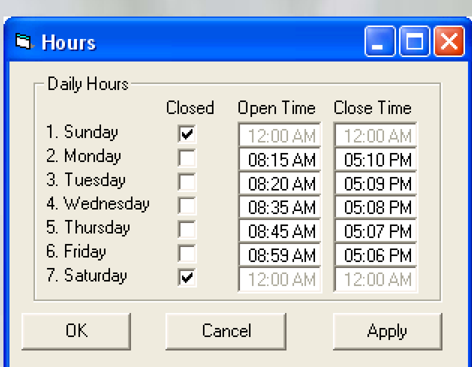
Seven things that should always be in an IVR self-service solution

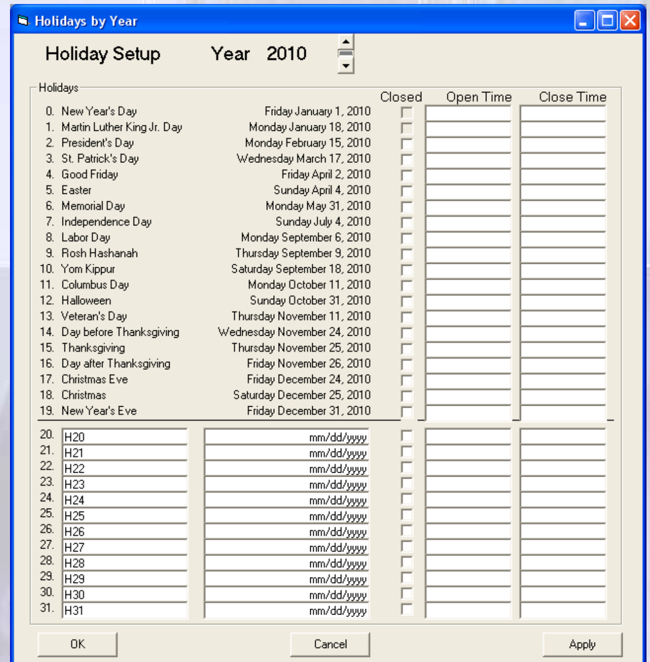
We have all done it before; dialed in to a voice response unit which is more of an aggravation than a help. It is important in the design of your applications to take a few steps to improve the ease of use for your callers.

Can not transfer out of VRU to a live representative

The number one complaint against most VRU routines is the lack of ability to transfer out of the exiting path to a customer service representative. Always build an exit strategy within your program that allows the caller to transfer to a live customer service representative during office hours, leave voice mail outside of office hours, or play a voice banner which gives the caller another phone number to call for additional assistance. The ODTvision has simple setup screens that notifies the system if the office is closed due to a holidays, the day of the week or normal office hours. All one must do in their self-service script routines is to look at what has been defined as hours of operation:



And also look at whether today's date is selected as a holiday or is market as a special company closure day.



Help, I'm in a continuous loop

Almost as aggravating as not being able to transfer to a live person is to be caught into a loop where you can only resolve it by hanging up. Always build a backup step in the menu to go to the previous menu or the general main menu. A caller may find out that the retrieved information may cause them to need to do something else. If that occurs, build logic in the script to address this special user's needs.

This Menu is too complex

Never make a menu beyond 5 menu items. It is better if you create sub-menus with branches of previous menu. If there are too many items to a menu, the caller will forget what is available by the time they get to the last item. You may also consider replaying the menu upon the caller entering a prompt or if no data is entered after a certain amount of time.

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Get Your Own Demo Today

Contact us to get your own demonstration of the ODT VISION Voice Response Unit. This demo application 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

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

Voice prompt keeps playing

If the caller hears what they are looking for or they use the system a lot, they will key the menu option once it is heard. Place in your script the option to discontinue the playing of the voice file once any key is pressed. This will allow the user to use the system faster without having to hear every voice file prompt in its entirely. Optimize the order of the voice file's prompts in the menu to also speed the caller's progress.

Golden rule, "Don't ask caller for something they don't know"

This is one of the most important rules of all. If the housewife calling in to check the status of her shipment doesn't know her tracking number, ask her for the phone number she used when the order was placed. Read back the most recent order which used this phone number. That is probably the one she is looking for.

I don't know the logic of the routine or what data is allowed

The ease of use in some complex routines where a lot of data is going to be entered can be made easier if the user knows what information is expected. An example of this might be an "Open Enrollment" in insurance. In this example, the user just wants to go into one item in the "Open Enrollment" application and change that item instead of answering questions for each item. (Item 23, change family dental deductible...values allowed $200, $500, $1000) Additional assistance could come from an instruction form which contains a number for each question and the values allowed for that question that can be selected on the form before the user calls in. These instructions need to be made available to potential users.

Build a log of usage

Your telephony system may be dynamic where it is always changing to improve the customer service function. It seems to be a second thought in the design and planning of a new application to build a log which will show the audit trail of how your users are using the System. By monitoring the use, you can refine it to be a better self-service solution.

Things that the log should contain:

- User who used system
- Date/Time stamp of activity
- What application did they use
- Length of call
- Did they request a transfer out of the system
- (Optional) Survey of satisfaction of session
- Security issues and changes in profile or passwords
- Hang-ups with no response

By adding any or all of these points, your system will be more informative and easier for the user to use. You need to review the "line usage utility" to monitor capacity issues and review the logs for a comprehensive under-standing of how the unit is being employed. Self-service solutions can save money, offer 24/7 assistance and be made great for the user with some simple planning and understanding of what the self-service solution needs to do.▪