

I don't receive Health Benefits, You don't have to pay FICA, nor do I Take Days Off

Volume 7 Issue 83  
7/31/2011

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## The Kiss Principle Is Always the Best

There is an old adage that embodies common sense and is a focal point of what your application needs to embody.... "**Keep It Simple Stupid.**" In the design of any telephony self-service application, nothing is more important than the "**KISS**" principle. If your IVR application is not friendly or easy to use, your users will be discouraged from using it. This month's newsletter will cover some of the common topics that you need to consider.

### IVR systems are generally used:

- ⇒ To service high call volumes
- ⇒ To take customer service to 24/7
- ⇒ To lower the cost associated with customer service
- ⇒ To reduce the demand for the high cost live customer service representatives
- ⇒ To improve customer service by making the experience easy and functional while meeting the client's schedule to use your self-service solution

In general, an IVR application allows the caller to interact with a company's database via the touchtone keypad or through simple words using Speech Recognition. Either a prerecorded voice

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banner or dynamically generated voice banner (Text To Speech) is used that prompts the caller to make a selection or informs the caller of information retrieved from data within their database record. The ODTVision VRU is a customizable interface that allows the simple creation of these IVR applications to satisfy your customer service telephony needs.



## Never Ask A Caller Something They Don't Know

If there is a cardinal rule in the design of an IVR application, it is to never ask a caller something they don't know. This requires you to define the needs of each caller group and what information they would have to work with. For example, if we are doing a utility billing/payment system that is based



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on an account number, you need to ask yourself...will our caller know their account number? Chances are they may not but they most likely would know the phone number of the home phone associated with that account number. By simply asking for that 10 digit phone number and looking up the proper account with that, the system would then be able to see the proper account record even though the caller didn't supply that account number and then the system can move on though this self-service application.

As stated, it is so important to know your caller, what they know and what their needs are. If your firm's IVR application needs to cover more than one type of user with different functions, you may consider having different groups of lines tied to different types of calls. Therefore a customer won't get into an employee's menu where they are asked a question that they have no idea how to answer. As an example, you don't want the outside client to get into the employee's application where they are asked to supply their driver's load number where this function is unrelated to their needs.

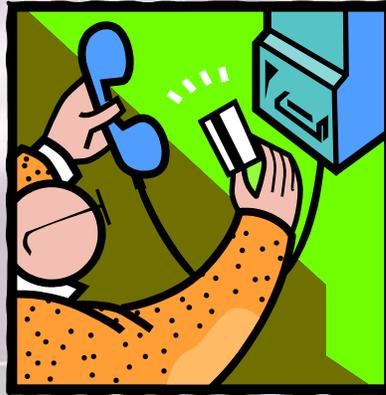
### Never Go Beyond 5 Menu or Sub-menu Options

We have all done this before,... called into an IVR self-service solution that has a menu so complex with so many steps that by the time the list is given, we forgot what the menu options there were. It is best to limit your menus and sub-menus to just a few possible responses and then use sub-menus off of this if you need to go deeper. The caller will not only

feel better when the steps are limited but the system will just seem to be more friendly. We recommend to our clients that a menu never goes beyond five options. Once again, we see where the "KISS" principle is an effective choice.

### Optimize Your Menus

Sometimes there is a grey area in your application design where you don't know how a self-service solution will be used. If you see trends after implementation where most callers are selecting a particular menu option, make that the first menu prompt as a large percentage of the callers will always select this for the menu or following sub-menus. This will shorten most calls.



### Optimize Your Voice Banners

One of the important options in the customization of the ODTVision is the ability to stop the playing of a voice banner once the caller has entered a selection. This will allow the caller to move to the next step, shorten the call and in general make the system seem less complex as the caller isn't hearing a bunch of

#### Define the User and Assign Phone Lines Based on Type of User

A customer will be totally confused if they are sent to a menu for an employee application where they are asked to enter their employee ID and clock-in time.

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unnecessary menu options or voice prompts. If combined with the previous suggestion prioritizing menu choices, you will develop a smooth flow where most callers are very quickly moving through their IVR application by just always taking the first possible menu response. In the end, this will reduce the amount of time a call takes, frees up resources and seems friendly to the user.

### Reduce the steps

There are several ways to reduce the steps or menu options and therefore make the IVR application seem simpler and more friendly to use. The newsletter already discussed having various types of users assigned to a particular group of lines that have menus with fewer options. Another method is to add some logic that assists the user. For example, if we know the CallerID of the caller and we can match it to a database record that contains this CallerID value, we can bypass the sign-on section of the application to identify who the user is. Now you may not know the CallerID of all your users but once a user has called and signed into the system, you could write their CallerID value to their profile, and in the future they would be recognized by this value.

Once your user has logged into their profile, retrieve from that profile values of variables that may be used later during the call. Lets say we are working with an account inquiry payment system. It could be for any type of firm. The first thing your IVR application does once a caller has identified themselves

is to give the current payment amount and when it is due. Most likely you would also state what the last payment was and the date it was posted to your payment system. Now, assuming what we really want to do here is collect the payment due....

The system now plays a voice prompt stating....

**“Please Press 1 if you would like to make that payment now....”**



The script has eliminated the caller's possible payment mistakes :

- ⇒ By providing the payment amount, you assure that it meets what your payment system requires for that account (especially if you do not allow partial payments)
- ⇒ The user may not have correctly heard, remembered, or entered the value that the system spoke so those errors are removed
- ⇒ There is one less step for the user to do
- ⇒ Instead of returning to a general menu that may have an option to make a payment within it, the system allows you to strongly suggest or require the caller to make a payment now...

Always retain values for any data a caller may need during their call whether they are pulled from the database record or values the caller supplies. No caller will ever like being asked the same question again. Let's go back to our original application of the inquiry/payment system. We already know the account number from the CallerID, the account financial information, and other data. So if your

### No Caller Likes Being Asked The Same Question Again

Keep all variable values to reuse when the caller is in another part of the system.



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## THINKING OUTSIDE THE BOX Get Your Own Demo Today

Contact us to get your own demonstration of the ODTVision 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 ODTVISION VRU to simulate a phone call to the data. Manuals and case studies are also available on the web site.

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payment system needs the name tied to the account to fulfill the payment transaction, the script could automatically supply that from the database rather than requiring another entry by the caller. Since we now know the account number, the name on the account, the amount of the payment,...etc...we can now bypass steps in the payment process and we know all information is accurate.

### When a Call is Transferred, No User Ever Likes Being Asked Again, Who Are You?



One thing this is always an aggravation to IVR systems users is to be transferred out of the self-service application to a live customer service representative and then be asked again who are you and what do you need. This falls into the area of Computer Telephony Integration (CTI). In an ideal world, when a call is transferred to a live customer service representative, there would be a screen popping for the representative where the account information and what they need would be displayed.

This requires many elements of the environment to work together in harmony. The VRU needs to know what customer

representative has taken the transferred call and then it has take over control of that agent's screen and call up the proper caller profile screen. It is not always possible to integrate phone systems with your computer systems, especially if you are doing blind transfers to random hunt groups However, there is a simple modified version of CTI that can be done in almost any environment. Before the call is transferred, a database record can be written that contains the VRU phone line/extension that is doing the transfer, what account is using that line and what function they are needing help with. The live representative sees the extension number that did the transfer and looks at the data within this database for that extension:

#### Ext. Account Number What is Needed

1001	123456789	needs help with pmt.
1002	Unknown	can't locate account info

Now the agent is able to greet the caller...Please let me pull up your profile...Thank you Mr. Smith, I see you need help with a payment..

Always keep the "Kiss" principle in the design of any IVR application to make it friendly and easy to use. It will improve the way your self-service application is viewed by its users and as a result they will use it more. ■