

THINKING OUTSIDE THE BOX  
IN CUSTOMER SERVICE

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

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**Inside  
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issue:**

## Rules of Business

Any client that has ever worked with us on the design and implementation of an IVR application using the ODTVision VRU will constantly hear me use a phrase as we discuss the project ..... "**What are your rules of business on this?**" As the client and our firm are working on the customization of an IVR solution to provide the telephony application, we are discussing the traits and needs of your users and features needed to perform your business functions. The IVR application needs to incorporate all the logic for any function or condition.

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## How is Customization Done

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. **ODT VISION®** addresses these issues by being the most versatile and inexpensive telephony solution available. Direct connectivity to the

host in real time is not even an option for most telephony systems. With the 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 or data.

Your own voice response applications can be created using the script compiler. ODT VISION® uses an easy to learn "Basic" - like scripting language allowing you to quickly create your own voice applications from any display screen application from the I5/iSERIES/AS400 or linked from table within a databases.





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## What are your rules of business ?

Sorry to digress with the whole section on customization but it is important to understand that our solution allows the end-user to make their IVR application do anything that their business needs it to do. There are some general talking points that any early design needs to address:

- ⇒ What applications does the self-service solution need to achieve
- ⇒ What are the type of users for these self-service applications
- ⇒ What are the needs or the different types of users
- ⇒ Define how your current customer service works on this application
- ⇒ Define how you could improve customer service though this new self-service solution
- ⇒ Does there need to be a protocol for after hour emergencies
- ⇒ Upon certain found conditions during the caller's progress through the application or upon request, does the caller need to have the ability to be transferred to a live customer service representative
- ⇒ Define if the system needs to incorporate an interface to a payment system
- ⇒ Define if the system needs to send email

and/or SMS text messages

- ⇒ Does the system need to make calls out upon certain conditions
- ⇒ What are your logging requirements for the application (s)

What I am saying is that before we start, use this publication's montage "Thinking Outside the Box In Customer Service" to design your IVR solution to be friendly and easy for the caller to use, at the same time it needs to be responsive to the customer service needs of your firm. Bottom line, most likely you are acquiring the ODTVision VRU to improve your customer service by allowing the customer bi-direction communication with you firm on a 24/7 basis while lowering the overall cost in providing that service.



## Real Life Examples of the Application of Rules of Business

Most clients come to Vision Voice Vantage with a predefined concept of what they want to do. It may be some type of inquiry system where a caller can check on the shipment of an order or the balance of their account. Perhaps it is a payment system where the user can log onto their account and then pay a monthly cable bill.

It might be a hospital or medical clinic that is calling into the insurance company to check the insurance policy coverage, to report a claim or maybe check the status of the claim. These are all just general



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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 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:  
[TechSupport@ODTVision.com](mailto:TechSupport@ODTVision.com)  
Or Call: 888-252-2555



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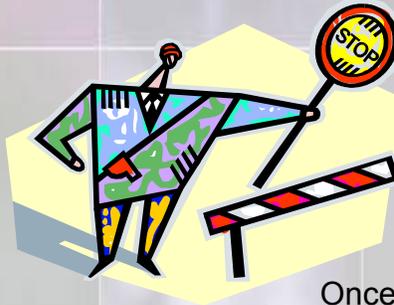


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functions and easy to design and implement once we have a handle on the data, characteristics of the user and how you want this application to function. We always start with a flowchart and there is an interactive conversation between the new client that is acquiring the ODTVision VRU and our personnel. There is an old adage, "You can't see the forest for the trees"...and right now we are working on the trees. Now for the interesting part of the creation of an IVR application, which is like putting a puzzle together where there are many pieces.

We don't work with any one vertical or type of business. The ODTVision is integrated into a variety of sizes of firms. We don't always know how you do business and what you want to accomplish with your telephony self-service solution. So there is always a point where the general functions of the application and its logic are now built in the initial flowchart. We sometimes have to tell the new client to slow down at that point and stop to think about their "Rules of Business" and what they want to accomplish. Now comes the need to enhance that original design to implement logic and features for certain conditions that



will customize this application around the client's rules of business.

### Example (Wants to get Paid)

We see this one a lot. We had a large veterinarian supply company that created an IVR application where the veterinarian staff could call in, sign onto their account, check balances, check statements, have statements faxed on demand and also make payments. This is a typical client's request and pretty much straight forward.

Once the caller had signed into their account, the caller normally would get a general menu where they could select what they wanted to do.

As we were working on the design of this project the VVV client asked if the VRU could look at the current account status and if the customer had a balance due of \$500 over 60 days or any balance over 90 days, the system would encourage a payment of X dollars. So before the unit gave the caller the general menu, it informed the caller of their past due account balance. At this

Vision Voice Vantage, Inc. is a certified ISV for IBM. Visit our web site on IBM.com at <http://www-304.ibm.com/partnerworld/gsd/solutiondetails.do?&solution=25001&lc=en>

point, instead of going to the general menu, the caller would be prompted to make a payment via the VRU. If the caller refused to make the payment via the self-service IVR application, the call got transferred to a live account representative that request the payment. If the office was closed and the caller still refuses to make a payment, the IVR application writes a note to their account record that the IVR told the user on (date/time stamp) that X dollars was owed and they wouldn't make the required payment. This is an example of how this firm's "Rules of Business" were applied to the application. We see this type of logic in so many accounts. Perhaps it is a cable company where if the past due amount isn't paid, the service will be terminated. This makes for unhappy customers, and lost business for the cable company. You can avoid these issues by building the business rule in your IVR application to assist the caller and make it easy for them to pay.

If during the shipment status application the caller finds out the order has not shipped due to a credit hold, the application needs to incorporate the "Rules of Business" to alleviate this condition.

#### **Example (Needs to Send an Email/Text)**

We are working with an account that rents vacation homes, condos and apartments. They are acquiring our solution to replace an old VRU that they have had for years. It is being implemented to serve the rental clients, in-house cleaning crews and 3rd party repair vendors.

Basically the first stage of design was just to document what they currently have and clone that functionality. Now comes the question of how they do things in real life. When a renter comes to their city, they go to the rental office to register. That property may not be available at

that given moment but once the unit is clean and available, the rules of business require them to be notified. This will now happen via an email or text. Once the cleaning crew calls in to report the unit is clean, the IVR application will send a notice to the renter that the unit is available.

#### **Example (After Hours or Emergencies)**

The ODTVision VRU has a simple to use configuration setup to determine if an office is open or closed. This is a combination of the day of week and time of the call with a table of scheduled closures and holidays. This means that at the time of the call, our customization script knows if the office is open or closed. Based on this office status we can determine whether the call can be transferred to a live customer service representative or that this is an emergency that has been reported after hours and needs to follow an emergency protocol...what are the "Rules of Business" to handle this?

There are so many conditions and elements that will trigger certain rules of business in your IVR application but you need to first define your "rules of business." The planning starts there. ■