

Can a Web Self-service Customer Service App be a Total Replacement for Self-service IVR Applications?

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It is a discussion I have had many times with a potential client while addressing self-service applications and the user's needs. *It is most likely*

that the one size fit all approach may not fulfill all your different type of users and their specific needs.

This month's newsletter will address why you may find yourself needing multiple concurrent types of self-service applications.

The modern trend is, "We will do it through a web site as everything can be done through the internet." That may be possible but it reminded me of a story from a client site years ago. I was at a whiteboard in a client's conference room discussing the needs and logic of a new self-service application for a utility company for customers to report electric outages. Now our VRU unit and the host system would be on a backup generator so the application would always be

live even if the electric network went down. As the discussion continued, there was a raised hand in the back of the room where an executive replied, "Isn't an IVR application out of date and wouldn't this be better to do this through a web site as that would be more modern?" I replied, "think of what is happening here. The customers have no power and we want them to report the outage." This was before smart cellular phones and web access would have been limited for most users wanting to report the outage. This points out your self-service application needs to be built around the needs of the user and the situation. Always start by defining the situation and the user's needs.





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USER'S NEEDS AND REQUIREMENTS

The critical reason for a self-service applications for customer service is to improve the ability of those applications to address user's needs 24/7 while lowering the overall cost. While some users may always have web access, that may not be true for every user at every time.

Besides just having access to a web site, the internet self-service approach requires the user have a degree of sophistication and training to navigate a web site. In the IVR application method, the app provides audio banners that allow a first time user to navigate the application by responding to the voice prompts. The

application may be very simple. An example may be where the user calls a phone number and based on CallerID, it provides the customer with current account balance and information regarding the last payment.

An IVR self-service application reaches the largest audience as it :

- Requires no equipment other than a phone
- Can address users in the field even with no web access as cellular phones can be used
- Requires no training of the user or ?supplication? so first time users achieve their goals
- Can be automated based on CallerID so no user input is required
- Can address multiple languages where the user selects what language they want the session to be in

APPLICATION REQUIREMENTS

Almost weekly, the news reports that some firm's website has been breached where unlawful access has been detected and which has exposed personal user information. Banks went with IVR applications 20 years ago for customer service as it reached every customer, was easy for them to use and most importantly by the actual function being provided,....was very secure. This is an inherent trait to a properly designed IVR application. An IVR application can be more difficult to breach as the data and logic of the application can only be used as designed by the system. The IVR application may be linked to live data but there are tight restrictions for access to other components of the database. The logic flow of the interactive IVR application drastically reduces the chance of a user from doing anything outside the scope of the application.



In addition, the very logic of the application may be defined by the type of user and their needs. Let's say you have a self-service solution that needs to address customers, employees, and perhaps a variety of users that work for 3rd party companies that your firm does business with. Once the user identifies themselves and that may be from CallerID,..... the logic of the application may be directed based on what that type of user needs to be able to do. This user type will also define what data is accessible or if and to who that user can transfer if needed. Within a user



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THINKING OUTSIDE THE BOX
IN CUSTOMER SERVICE

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.

type, you may have sub-sets of users with specific needs. We had a construction firm that had the ability for employees to call in to report being absent, report being late to work or to request vacation dates. An additional function of this self-



service IVR application was for the shift foreman to have the ability to do remote payroll entry. That could only be done by the foreman and that ability and menu item only became available with the proper signing on by the foreman himself. Additionally, the foreman could do work status reporting to the central office. This function could also be done by 3rd party companies doing work on a project. Of course, the foreman could only post payroll hours for workers under his shift. Both the foreman and the 3rd party user could only post status of completion on projects under their responsibility.

You may require the ability of a user to transfer to a live customer service representative. This function may be defined or limited by many factors. The transfer request needs to define how the call



is to be handled during office hours where there are live customer service representatives to talk to vs outside of office hours. The

ODTVision VRU has setup screens to determine days and their hours for the business to be open to provide the logic for transfers. It also takes into account when the office is closed for holidays or special closure days. The very logic of whether a

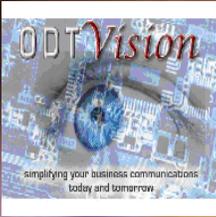
transfer is allowed may be defined by the user type or profile.

Where this user is transferred may also be determined by the IVR based on what part of the application they are in. For example, let's say a customer is having issues with making a payment, they may need to be transferred to accounting for assistance where if there is an issue with modifying an order, that user would need to be transferred to the account representative assigned to them.

Logging and audit trails can be used to see who is using the system and how they are using it. It is quite easy to build audit trails and reports based on data collected by the users accessing the system as they go through the call. By analyzing this information, your firm may want over a period of time to modify the self-service solution to better address the user needs.

This brings up the ease in which the ODTVision VRU IVR applications can be customized and changed. What is important to note, this can be done by the end-user with no programming experience. Our VRU software can be loaded on a secondary PC in a development environment which allows this modification to exist external to the production unit which is left undisturbed. **This ability helps companies meet requirements of the Sarbanes-Oxley governmental regulation.**

Not all changes are to the user's application side of the system. Sometimes there is a



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CONCLUSION

change to the host system data, computer platform or telephone system. There again, the ODTVision VRU makes it easy to modify your system to adjust to these changes.

Over the years the ODTVision VRU software has changed to meet new technology available and changes in the operation systems. We have maintained a migration path so that you maintain your investment in the customization of the self-service application around your needs.

COST CONSIDERATIONS

It will always be less expensive to meet a user's needs through an automated system instead of a live person. Any call addressed by the IVR self-service application will free up the live customer service representative to take on an issue which actually requires personal intervention. This results in a more efficient use of your personnel.

The low initial cost of our solution is only one of its benefits. The ease of customization and talent level required to go live allows you to use in-house personnel. This also lowers the overall cost to administer the solution or make changes in the future.

This month's newsletter points out that a web site may not be the only desirable method to provide self-service and it may be more cost effective to provide some self-service on a VRU. The IVR application will be available for a wider range of users and easier for them to use in some types of applications. It also is more secure and can be more easily tailored to certain user's needs or changes within your firm. The development and design cycle of the ODTVision VRU may be shorter and therefore allows you to get up and running quicker than a web solution. It is also a backup if your web site goes off-line. Feel free to contact us to discuss your firm's needs. ■

