Vision Voice Vantage, Inc.

THINKING OUTSIDE THE BOX IN CUSTOMER SERVICE

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ODTVision VRU Can Be Anything

A number of years ago our VRU was awarded the prestigious national award from "Search400.com for Product of the Year in the Business to Business category." While talking with a member of the selection committee on why our VRU solution won, ….this individual stated, **" it was no contest as our product could do anything."** There is a real benefit to having a VRU solution that can be modified and customized in-house by the client themselves to provide self-service solutions. No one knows their business better than the client themselves. They know all the elements of their products and services. They also know their customers and what is needed to properly meet their customer service needs. Finally, they see the new trends and requirements of their vertical and understand the need to keep up with these trends and changes.

IDENTIFICATION OF THE NEED

Obviously any call that is addressed through the self-service IVR application frees up a live customer service representative and will be cheaper to provide. This also adds to the capacity of how many concurrent calls your firm can handle and frees up that live customer service representative to address users that have a situation which requires human attention immediately. You may have a variety of needs for a self-service IVR application.

- ☎ Address customer service needs 24/7
- ☎ Give users instant access to information with-out holding
- ☎ Adding capacity for concurrent calls
- ☎ Freeing up live reps to address calls requiring human intervention
- ☎ Reducing hold times in waiting queues for all users
- ☎ Address non-English speaking users
- ☎ Define the users needs and transfer them to the proper department or individual to address their request
- ☎ Automatic notification regarding their account such as over due notices or statuses
- ☎ Transaction Confirmation
- ☎ Shipping

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Sample Applications for
ODT VISION®
Telephony for Windows and the IBM iSERIES/AS400

- Order Entry
- Password resets
- Transaction Confirmation
- Shipping Information
- Pricing Information
- Stock Availability
- Customer Inquiry
- Available Credit
- Information Hotline
- Offsite Payroll Input
- Employee Benefit Hotline
- Customer Response
- Automated System Operator
- Automated Paging & Email Delivery
- Fax Back Systems
- Query Reports On Demand
- Human Resource Support
- Warehouse & Logistics Support
- Automated notification to personnel in field
- Audit and Log trails of all activities

These are just some of possibilities of general applications that you could automate with the ODTVision VRU. A more detailed example with flowcharts and talking points is found within the web site using this link.

http://www.odtvision.com/includes/ODTVision/20Application/20Examples.pdf

CONDITION MEANS LOGIC CHANGES

In the design of an IVR application sometimes you have to examine what you want to happen if a certain account status or condition is now reached. For example, in a simple order entry and shipment status applications, if an order is on credit hold not only do you want to tell the caller that but also try to correct the credit hold. This may be where you allow the user to make a payment to remove the credit hold or transfer to a live customer service representative that can take a payment or perhaps even revise the credit limit to free up the shipment.

The very logic of the call may change based on something within the account status. Years ago we were working with a very large national veterinary supply company. Their IVR application was a simple account inquiry, invoice/statement fax back application and also a payment system. After the system was designed the client came to me with a request to change the logic before the general menu. They asked the question:
Once the account is identified, could the application look at the outstanding balance and if the outstanding balance was above $500 over sixty days or any amount over 90 days…..could the system recognize if the office was open and if it was….transfer the call to the account receivables department? The goal of course was to collect outstanding receivables. If the office was closed, the user heard they had an outstanding balance and tried to get them to pay. If the caller

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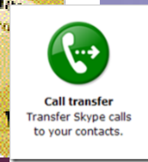

Contact us to get your own demonstration of the ODTVision Voice Response Unit. This demo application is a simplistic order entry and shipment status system which is running off a Microsoft Access database. The demo is in the test mode and you will be using the "Test Phone" feature of the ODT VISION VRU to simulate a phone call to the data. Manuals and case studies are also available on the web site.

over-road that request, a note was written to their profile that the automated attendant told them about the issue and the data was written to that account including date and time stamp.

AUTOMATIC CALL DISTRIBUTION

The previous section talked a little about call transfer based on account information which is an example of automatic call distribution. This can also come from a user's request. A user many need more information or a live customer service representative so they issue a request for a call transfer.

There is also the ability for the user to select what they need such as a department or individual. We have seen this type of call distribution within modern PBXs for years.

The identification of the caller may come automatically through CallerID or by the caller entering account information. Once the account is identified, an ACD transfer may be based on which account is calling. We had a large national scale manufacturing company that would identify the annual sales volume that a caller calling in was at. IF it was under $5000 per year, they referred to that account as a dead account only ordering supplies and any needs would be addressed by the IVR. If they account was above $5000, they could address their needs through the IVR application or request a transfer to a live representative during office hours which of course, the IVR application knew.

Sometimes two companies work from one self-service system. In this case, the identification of account can now define which entity the caller works with and by that, what logic and options are available for that caller.

The account itself may also have tags which identify the language to be used for this session.

The language will not only define which will be used during this session but also to which group of customer service representatives the call is transferred to if the user requires a call transfer out of the automated attendant system.

CONCLUSION

In conclusion, you need to determine what needs to be accomplished in your self-service IVR application. Understanding the needs of your users and the data that you will be working with will go a long way in the design of the self-service application. The last page of this newsletter has a questionnaire that will help you understand what is needed.

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Questions which Defines Your Voice System Applications

- ⇒ List the applications you want to accomplish in order of priority. (Please note which needs to be done in the first phase and which will be done later if multiple phases will be used.)
- ⇒ Define the users of these applications and their needs
- ⇒ Designate a date that the project needs to be live
- ⇒ Does this type of project require a capital budget expenditure and if so, when does the new period begin or has the money been allotted for this project
- ⇒ Identify a customer service representative who knows how this application is done
- ⇒ What computer system platform provides the data that these applications use
- ⇒ Identify the technical contact for the computer system, who can provide technical information regarding the host system
- ⇒ Define the characteristics of customer service you do well and what functions can be improved
- ⇒ Define the hours of operation for customer service and strategy changes, if necessary for after hours communications
- ⇒ Define any special requirements (e.g. bank connection for credit/debit card clearance) that this application requires
- ⇒ How many calls does the department where the ODTVISION VRU will be used currently take
- ⇒ What is the average length of call within this department
- ⇒ Are there any peak periods during the day or week
- ⇒ Identify future applications
- ⇒ Decide whether to implement a transfer (exit strategy) for a caller to talk with a live representative upon request or for certain conditions (i.e. Credit Hold on Shipment is met) during office hours
- ⇒ Define protocols for emergencies
- ⇒ Define if you need to support personnel in the field or individuals on call
- ⇒ Define if you need to support multiple foreign languages and if so, what are they (i.e., Spanish…etc.)
- ⇒ Define your logging and audit trail requirements
- ⇒ Define your security requirements
- ⇒ Define if you need to support 3rd party programs or connect to other devices or sensors

Once a project is defined, we can start by building a flowchart of what the project will look like. This flowchart will show the logical paths that a caller goes through as they call into your unit. We also examine where the data is and in what format it is stored. (Helps in defining the means of connectivity.) The computer system screens or database will define the flow of this routine. ◘