

Happy and Prosperous New Year to Everyone



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### General Traits In Self-Service

Most of the time firms approach us with some type of customer service function which they want to provide to users on a 24/7 basis. The main goal is always to have a friendly system which addresses various user's needs, is easy to use, easy to create and lowers the over all cost to provide this functionality.

When approaching these self-service applications from a user's prospective, we know certain traits for the self-service apps. The user may be sophisticated or possibly not, so the application needs to be easy to use with no training. If the user already knows the application, we want to allow them to answer a prompt immediately and move to the next selection. Also the menu should be optimized so that the most frequently selected item is listed first. That makes the call progress for the user shorter. These two tips are simple design features that help make the self-service application friendly. It is assumed the user is remote and we can provide the self-service application without the user needing specialized equipment. In addition, users of this system may not be English speaking, and we are easily able to provide this application in multiple languages.

Banks have used IVR self-service applications for years. It can be used by any type

of user, is very secure, and defines what the user can/can't do. Through the application we can define the functions available to a specific user or type of user. Besides logging the user into the system with a UserID and Password, the system may also use the CallerID of the phone call to authenticate access into the system to provide an additional layer of security. Using CallerID requires that you collect and store authorized numbers in the employee records of the employees who will use this self-service system.

**This month's newsletter will cover some of the possible application needs that you have for users who are your own personnel.** Those applications have many of the same general needs as for external users for bi-directional information flow as described in previous newsletters. Staff self-service requirements will define specific functions to address your actual personnel needs.

### Job Scheduling and Management

We have seen many different implementations of job scheduling and management applications for a firm's personnel. They include capturing calls and data from delivery drivers proceeding through their route or a cleaning/maintenance crew reporting in.



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Perhaps one of the most unusual applications we ever designed was for one of the largest cemeteries in the country. They wanted personnel to report back to the central office if the grave they were assigned to was open or closed. I remember the DP manager asking me if I was freaked out about the topic where I replied that I was a big fan at the time of the series "Six Feet Under" and actually was intrigued by the application. What we had here was just a Job Scheduling/Reporting Management system with remote users needed to report back to a central office. They called in completion of the first task "Grave open" and later followed by reporting the second task, "Grave closed" completed.



In fact, this account had two other applications they needed. Since this was a very large cemetery with multiple chapels, they wanted the ability for people coming to a funeral to be able to hear the chapel and directions where their family services was to be held at "**Customer Inquiry**" and also address users calling in on availability of plots "**Inventory Inquiry**". To serve their client base, these functions needed to be provided in four languages.

### Human Resources



Perhaps an area within your firm where personalized employee information flow is of greatest need is in Human Resources. We have seen all types of applications developed for HR interaction with its employees.

Years ago we did an employee call in system through our VRU solution where employees could call in to report they were going to be absent or late. Since this was a live system with the employee's personal record, it would not only report to the HR system that the employee

had called in but check their record to see if they wanted to take a vacation day and post that to the profile. If there were no vacation days allowed or if they had missed too many days, it gave a verbal warning which was also posted to the profile. The HR self-service system was further enhanced to look at staffing for that department and if needed, made the calls out to find a replacement worker. Via email it also notified the department about the absent worker and replacement worker.

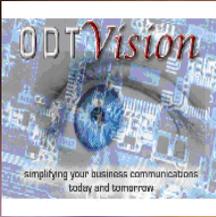


The old fashioned time clock has been replaced in multiple accounts with an IVR application on our VRU solution which provides data directly to and from the HR system. An employee now just picks up the phone in their department. The application recognizes the location and, if there is more than one employee in this department, asks for identification and a security password. We have had several accounts that also ask for a job code for this time period so proper account records can be updated.

Insurance open enrollment is another area of HR for self-service which needs to be secure, builds an audit trail, and provides service at a low cost for this sort term need. To make the system friendly, a pre-printed list of options allowed during this year's open enrollment may be distributed to the employees so they can easily select the options they want when they call in. We have also seen systems where instead of running through the whole list of questions, the user can select an edit option and put in the question number they want to modify or change.

If an employee is applying for a loan or other service, they need to provide proof of income and employment. We had a large account use our VRU solution so that their staff could call and sign into their account to request this proof.





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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 ODT VISION VRU to simulate a phone call to the data. Manuals and case studies are also available on the web site.

They were then were given an authorization code that they could give to the loan officer who then had 48 hours to call in to the employer and gather the required information. That individual could also generate a report that was delivered via fax or email. The employee could also call into the system to cancel the authorization code immediately if they desired.



You may want to allow an employee to call in and check on the availability of vacation time and if available, schedule it remotely. Family's schedules can be tight and let's say during a Sunday family dinner the discussion comes around as to what date will be the family's summer vacation. Your employee could call in and check if the dates in discussion are possible and if they are, lock down those dates.



Another feature would be to allow an employee to call and check on their current commission amount, since that is based on the sales receipts that have been collected and varies over time. Besides the advantage of making this an always available on-demand function, providing a self-service solution allows your personnel to do other things and it also means that staff do not have unnecessary access to other employees earnings amounts.



Retirement is another area where firms now try to address some individual requests through call-in self-service. The employee may want to privately access information and make decisions based on what they see in the payout for their own individual retirement plans.

### Conclusion

In conclusion, many firms want a way to interact with their employees to better serve their needs while maintaining privacy, on-demand requirements, ease of use for the user and a low cost to create and administer. Since we are talking about an IVR application, it can be operational 24/7 without the need for a live person. Privacy and the security of the application can be guaranteed through signing on to the system with a username and password and the use of CallerID or other secure authentication methods. Please feel free to contact us to discuss any employee self-service application your firm needs. ■