Contact Center - IVR Applications

It's Not Just For Energy Anymore

May 5th, 2011

Presented to:

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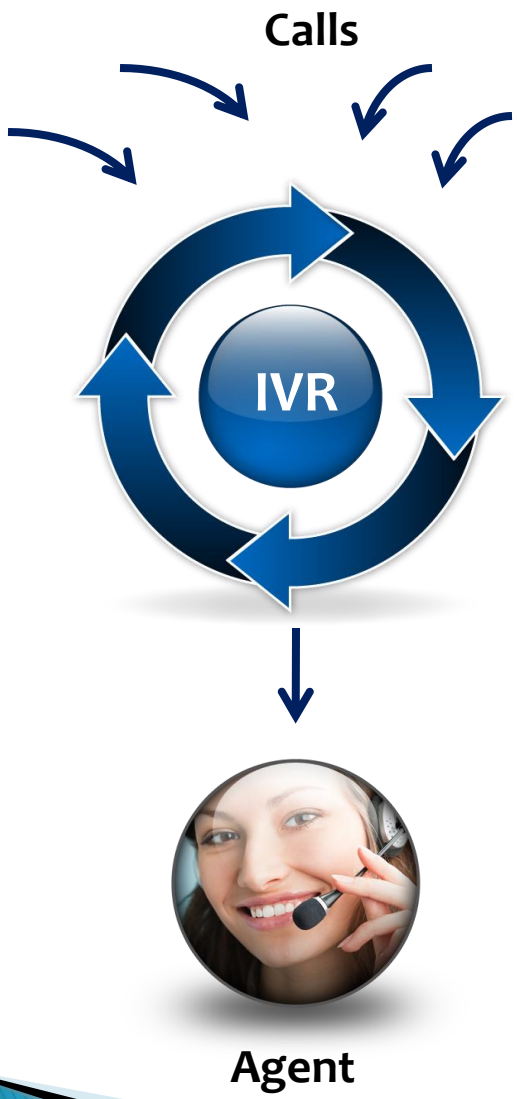
It's Interesting…



… that even though we consciously force all callers through our IVR applications, most "good" contact centers spend little to no time evaluating and/or improving this critical functionality!

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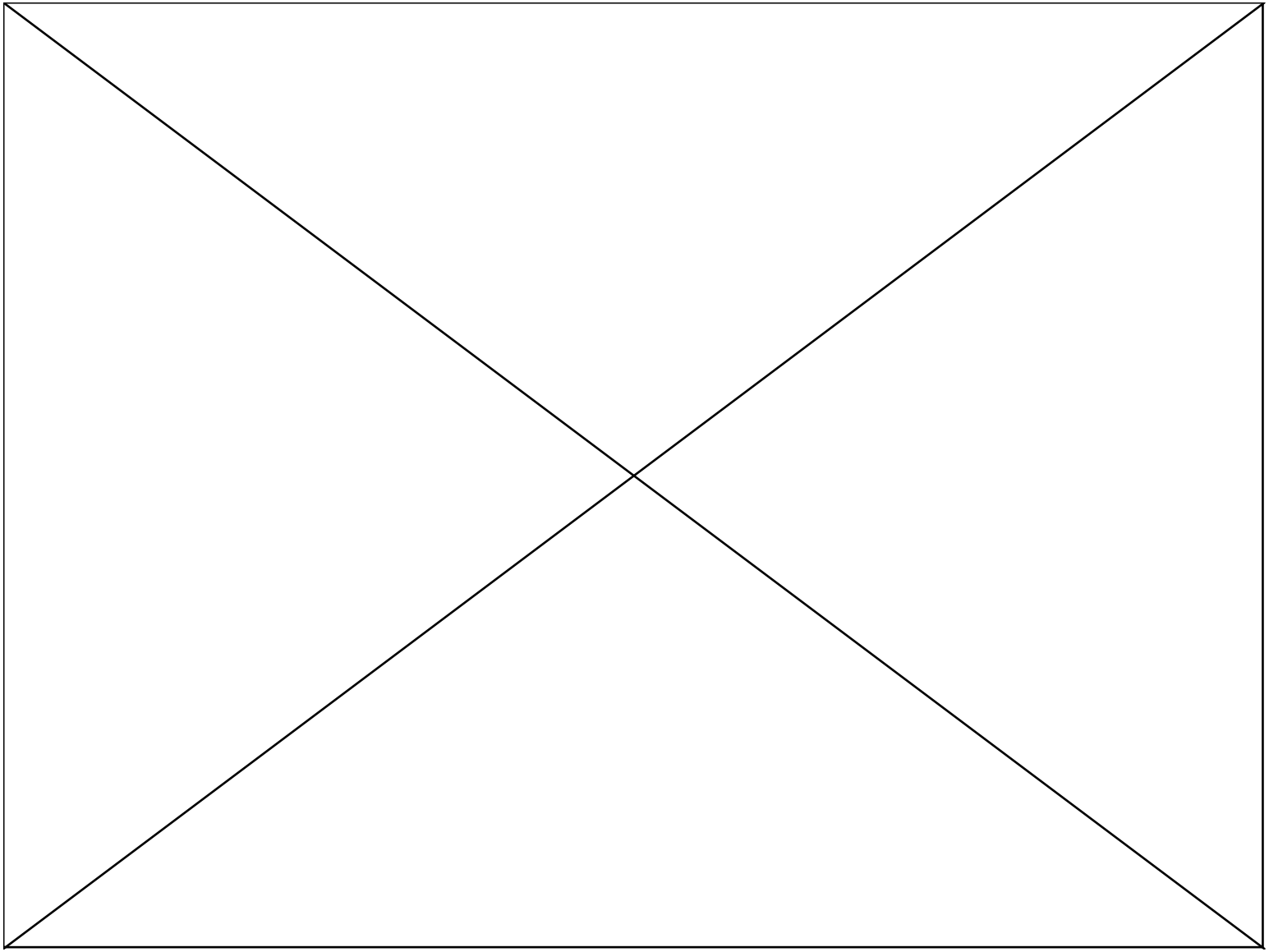

With a Show of Hands…

1. How many of you have had a frustrating experience using an IVR?

2. How many of you **love** IVRs (as a consumer)?

3. How many of you **hate** IVRs (as a consumer)?

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Today is All About…

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What is an IVR?

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I nteractive

V oice

R esponse

IVR		Auto-Attendant ("AA")
Primary function is to enable automated caller "self-service" – no "live" agent is required.	**Vs.**	Primary function is to collect call attributes and enable accurate call routing.

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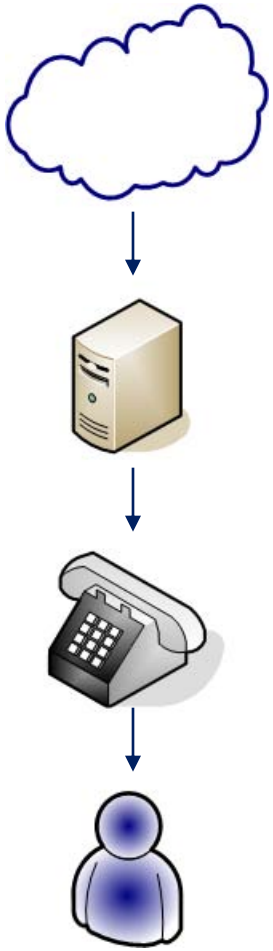
What does an IVR / AA Fit?



"The Cloud" – Telecommunications carrier where all inbound phone calls to Savvis' contact centers are received. Outside users call toll-free access numbers and will be routed into the company's environment where other technology components handle remaining call processing

IVR / AA – All calls received through **"the cloud"** are immediately routed into the IVR where either (a) additional information (call attributes) are collected for effective call routing and/or (b) callers service themselves using self-service functionality available within the system.

ACD – Calls that cannot be "self-serviced" within the IVR are sent to the ACD along with all call attributes collected while in the IVR application, the ACD then routes call to the most appropriate available agent based upon proficiency of handling the call type and overall importance of the call to Savvis.

Screen-Pop – Once the ACD determines the most appropriate agent to deliver the call to, the Agent will receive a screen-pop containing all relevant caller-specific information collected by the IVR. Information is used by the CSR to more efficiently handle the call.

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Why use an IVR and Auto-Attendant?

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Primary Functions

1. Call Routing
2. Customer Self-Service

Primary Benefits

1. Increased First Call Resolution ("FCR")
2. Increased Customer Satisfaction ("C-SAT")
3. Reduced Operational Expenses

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What You Might Be Missing Out On?

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Average Industry Cost of One (1) Live Agent Phone Call

$7.00

Vs.

Average Industry Cost of One (1) IVR Self-Service Transaction

$0.21

Conclusion: Call handled through an IVR are on average 97% less expensive than calls handled by "live" agents.

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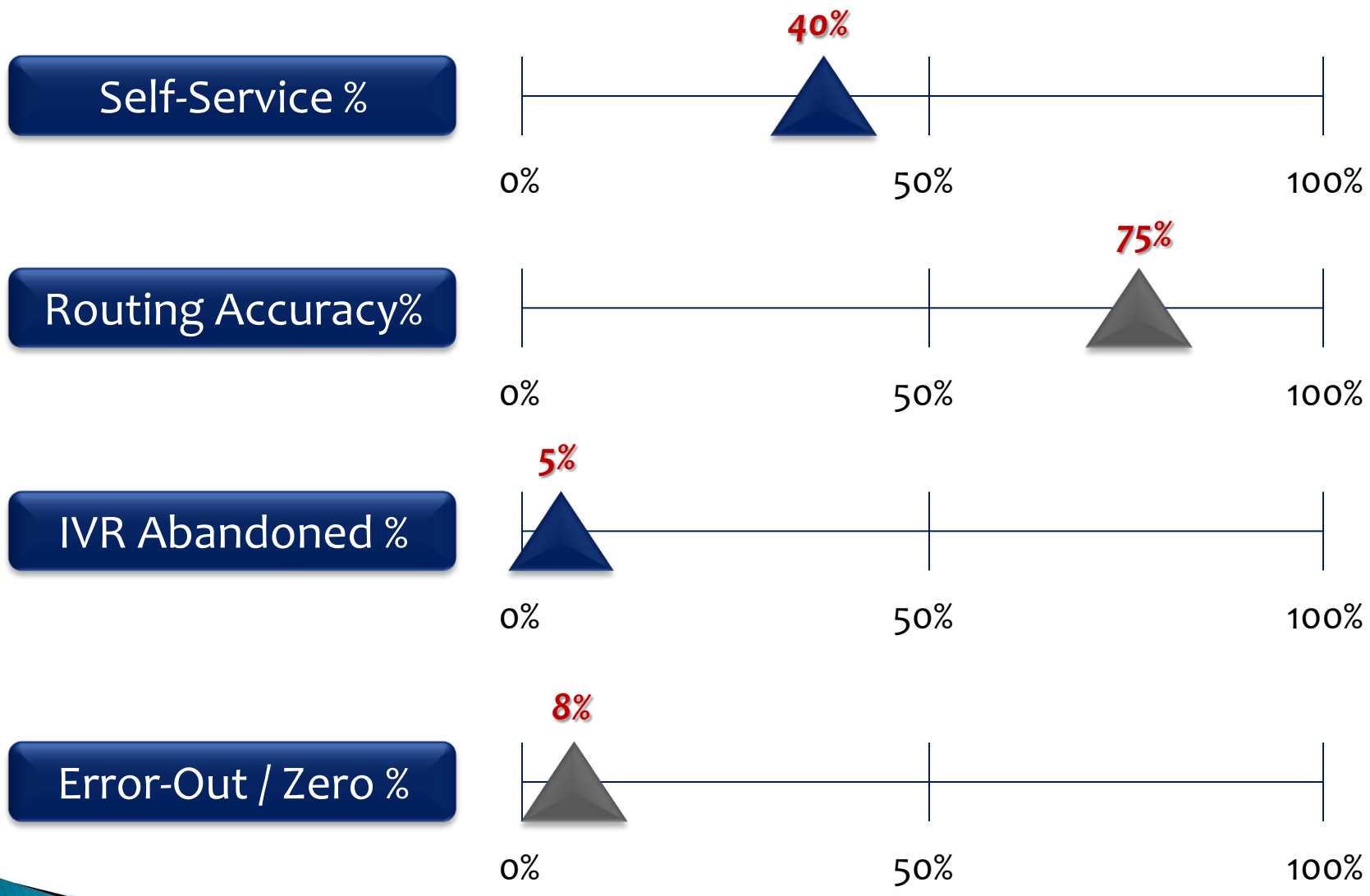
Related Industry Benchmarks



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With a Show of Hands…

1. How many of you have an Auto-Attendant?

2. How many of you have an IVR?

3. How many of you would like to learn how to improve your current capabilities?

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Achieving IVR / Auto-Attendant Success

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Two (2) Primary Focus Areas:

No IVR Today

Steps necessary to successfully implement a high-quality IVR and Auto-Attendant application.

Limited IVR Today

Steps necessary to optimize and significantly improve the performance of an existing IVR and Auto-Attendant application.

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No IVR Today *(deployment steps)*

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Develop Your CBA → **Design & Deploy** → **Tune & Improve**

Understand your Costs and Benefits, obtain approval to move forward with design and deployment of your new IVR application.

4 – 6 weeks

Produce a detailed IVR and Auto-Attendant Call Flow and provide requirements to IT for configuration and deployment.

12 – 16 weeks

Once your IVR and Auto-Attendant is implemented, continuously revisit your application for improvement.

See Section #2

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No IVR Today *(deployment steps)*

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Understand Your Benefits

1. Determine your Cost Per Call
2. Perform a "Call Type" analysis
3. Determine your top five (5) most routine and easily automated calls.
4. Create assumptions for caller "self-service" rate on top five (5) call types and multiply by Cost Per Call.

Understand Your Costs

1. Determine which IVR / Auto-Attendant platform to utilize.
2. Obtain one-time and ongoing costs of application and development
3. Prepare and present your Cost Benefits Analysis ("CBA") for approval to move forward.

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What is a Call Type Analysis?

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Example Data

Call Type	Calls (Monthly)	% of Total Calls	Automation Potential
Account Information	44,000	51%	High
Make a Payment	27,000	31%	High
Open an Account	12,000	14%	Medium
Close an Account	3,300	4%	Low
Total	**86,300**	**100%**	

- A **Call Type Analysis** provides an assessment of the calls that represent the best candidate for automation within your IVR application.
- An ongoing list of automation candidates should be maintained at all times with additions being made consistently to improve caller self-service.

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Example - IVR Cost Benefit Analysis

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CBA Inputs

Expense Reduction:					
	Project Year	Total Payment Calls	% Calls Self-Serviced	Cost / Call	Savings
Inbound IVR	Year 1 (2011)	-	70%	$ -	-
	Year 2 (2012)	300,000	70%	7.00	1,470,000
	Year 3 (2013)	300,000	70%	7.00	1,470,000
	Year 4 (2014)	300,000	70%	7.00	1,470,000
	Year 5 (2105)	300,000	70%	7.00	1,470,000

Year 1 (2011):				
	Functionality / Services	Description		Cost
One-Time Costs	Software	Included in Dialer CBA	$	65,000.00
	Hareware	Included in Dialer CBA	$	-
	Professional Services (Vendor)	Initial programming and development	$	55,000.00
	Installation	Included in Dialer CBA	$	-
	Training and/or Certifications	Included in Dialer CBA	$	-
	Consulting Support (CCIS Consulting, Inc.)	VUI design, testing, and Project Management	$	39,600.00
		Total Year 1 (2011) Costs:	$	159,600.00

Summary

Five (5) Year Net Cash Flows	Five (5) Year NPV (@ 12%)
$5.7M	**$3.8 M**

IVR projects will typically result in a ***3-4x*** Return on Investment.

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No IVR Today *(deployment steps)*

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Develop Your CBA → **Design & Deploy** → Tune & Improve

Design IVR / AA Application

1. Use IVR and Auto-Attendant Design Best Practices.
2. Construct detailed Call Flows.
3. Align your design closely with existing inbound skill sets and/or redesign call routing strategy.
4. Provide to IT for development and be available for testing.

Develop and Deploy

1. IT or third-party partners will develop your IVR application on selected platform.
2. Record your menus and prompts using "demographic appropriate" voice talent.
3. Test, test, test…
4. Deploy new application.

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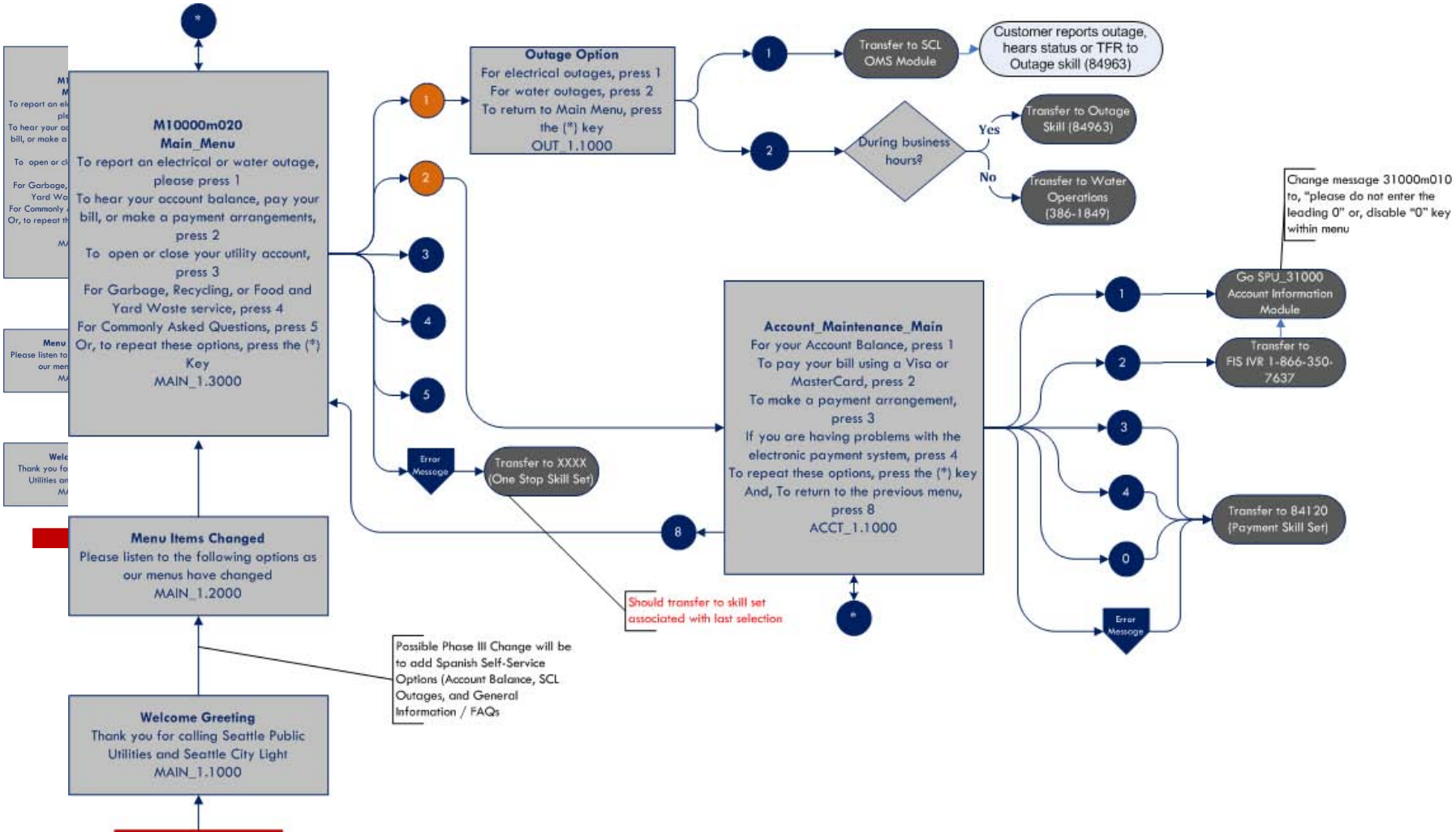
What is a Call Flow?



- Regularly evaluated

and Auto Attendant optimization.

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IVR Design Best Practices

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IVR Design and Usability Best Practices

1) Design for the masses
2) Design to the user's mental model
3) Choose the appropriate persona for the audience
4) Use multiple input modes effectively
5) Get the point quickly (greeting)
6) Keep verbiage as brief as possible
7) Keep menus short
8) Ask for the most accessible information
9) Don't ask, simply give!
10) Give callers time to respond
11) Limit the number of input attempts
12) Limit "help"
13) Design to ensure the user is not at fault

Factors that Commonly Confuse Callers:

- Welcome menu is too long
  (No more than 15 seconds)
- Callers hear unnecessary content
  (Your call may be recorded…)
- Too many options are presented to caller
  (Area code ID = United States vs. Canada)
- No "fast path" functionality available
  (Order number, existing order, etc.)
- Ineffective error handling
  (Graceful recovery, customer not at fault, etc.)
- Inconsistent user options
  (Type ahead, use of the "#" sign, etc.)

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No IVR Today *(deployment steps)*

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Develop Your CBA → Design & Deploy → Tune & Improve

Section #2 provides high-level steps for performing consistent , ongoing analysis and improvement of your IVR.

Key Watch-Outs When Designing your New IVR / AA:

1. **Must Have Reports:**
   - Node level
   - Abandonment rate
   - Zero Out
   - Error Out

2. **Design Strategy:**
   - Design for what makes sense for your users, not for what makes sense to you.

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So What, Who Cares?

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Why spend valuable time redesigning your existing IVR?

Major Northwest Water Utility
IVR Redesign Project Results

Metric	Before Redesign	After Redesign	Benefit Driver
Self-Service %	14%	32% (+18%)	Expense Reduction (9 FTEs)
IVR Abandoned %	24%	09% (-15%)	C-SAT
Error/Zero-Out %	19%	08% (-11%)	C-SAT
Call Routing Accuracy %	34%	81% (+47%)	C-SAT Expense Reduction (FCR)

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Limited IVR Today *(optimization steps)*

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Node-Level Analysis	Design & Deploy	Tune & Improve
In-depth evaluation of current IVR performance will indicate where caller "usability" issues and opportunities exist.	Using the Node-Level analysis, detailed call flows, and IVR design best practices, the new application should be designed and deployed.	Once your IVR and Auto-Attendant is implemented, continuously revisit your application for improvement.
4 – 6 weeks	4-6 weeks	Ongoing

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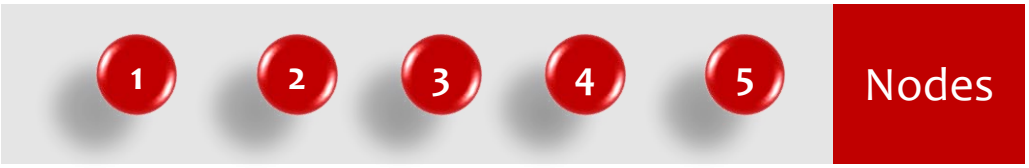
What is Node-Level Analysis?



- A **"node"** is any location within your IVR or Auto-Attendant where a user makes a decision.
- **Node-Level Analysis** is a detailed study over time (90 days preferred) to determine user behavior at every key point in your application.
- The analysis examines abandonment %, error-out %, zero-out %, and other key metrics to determine where caller frustration and usability issues exist.
- Results from this analysis are used to make decisions on changes to your existing IVR call flow.

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What is Node-Level Analysis?

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Location in IVR / AA

How many times did it happen?

What happened?

Node	Status	Cnt
cntEnterQuote	ErrorOut	149
cntVerifyPhone	ErrorOut	110
cntUsCanada	ErrorOut	108
cntVerifyAcct	ErrorOut	53
cntExtEnter	ErrorOut	43
cntVerifyPin	ErrorOut	21
cntMainMenu	ErrorOut	20
cntLoadETA	ErrorOut	8
cntSalesMain	ErrorOut	3
cntAcctLogin	ErrorOut	2
cntEtaMain	ErrorOut	2
cntGetETA	ErrorOut	2
cntBillingMain	ErrorOut	1
cntDriverNum	ErrorOut	1
gdtUsCanada	Hang Ups	344
gdtMainMenu	Hang Ups	241
grtInvalidUsCanada	Hang Ups	147
grtAgentTransfer	Hang Ups	68
dlExtTransfer	Hang Ups	61
gdtAccountLogin	Hang Ups	58
gdtSalesMain	Hang Ups	56
ohkMsgEnd	Hang Ups	31

Using the call flow and results from this analysis will provide the key tools needed to significantly improve your IVR and Auto-Attendant applications.

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Limited IVR Today *(optimization steps)*

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Design IVR / AA Application

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Limited IVR Today *(optimization steps)*

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Node-Level Analysis → Design & Deploy → Tune & Improve

Once your optimization effort is complete, best practices suggest the process should be repeated every ninety (90) days.

Wash and Repeat…

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Other IVR Best Practices and Ideas…

1. Fast-Pathing Capabilities
2. Outbound IVR
3. Integration with Web Site

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Fast-Pathing Capabilities

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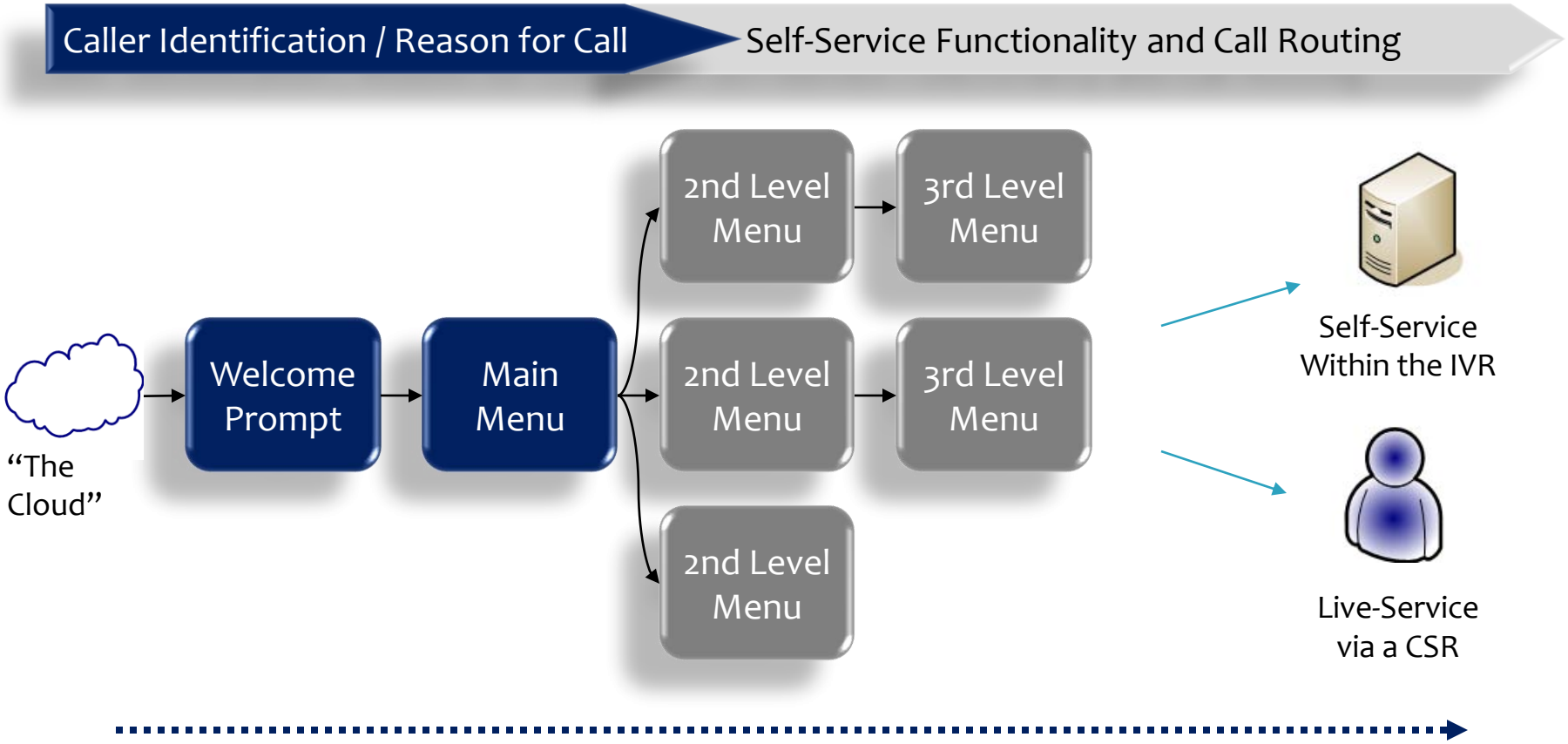
Typical Caller Experience…



Call Attributes Collected While Call is in the IVR

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Fast-Pathing Capabilities

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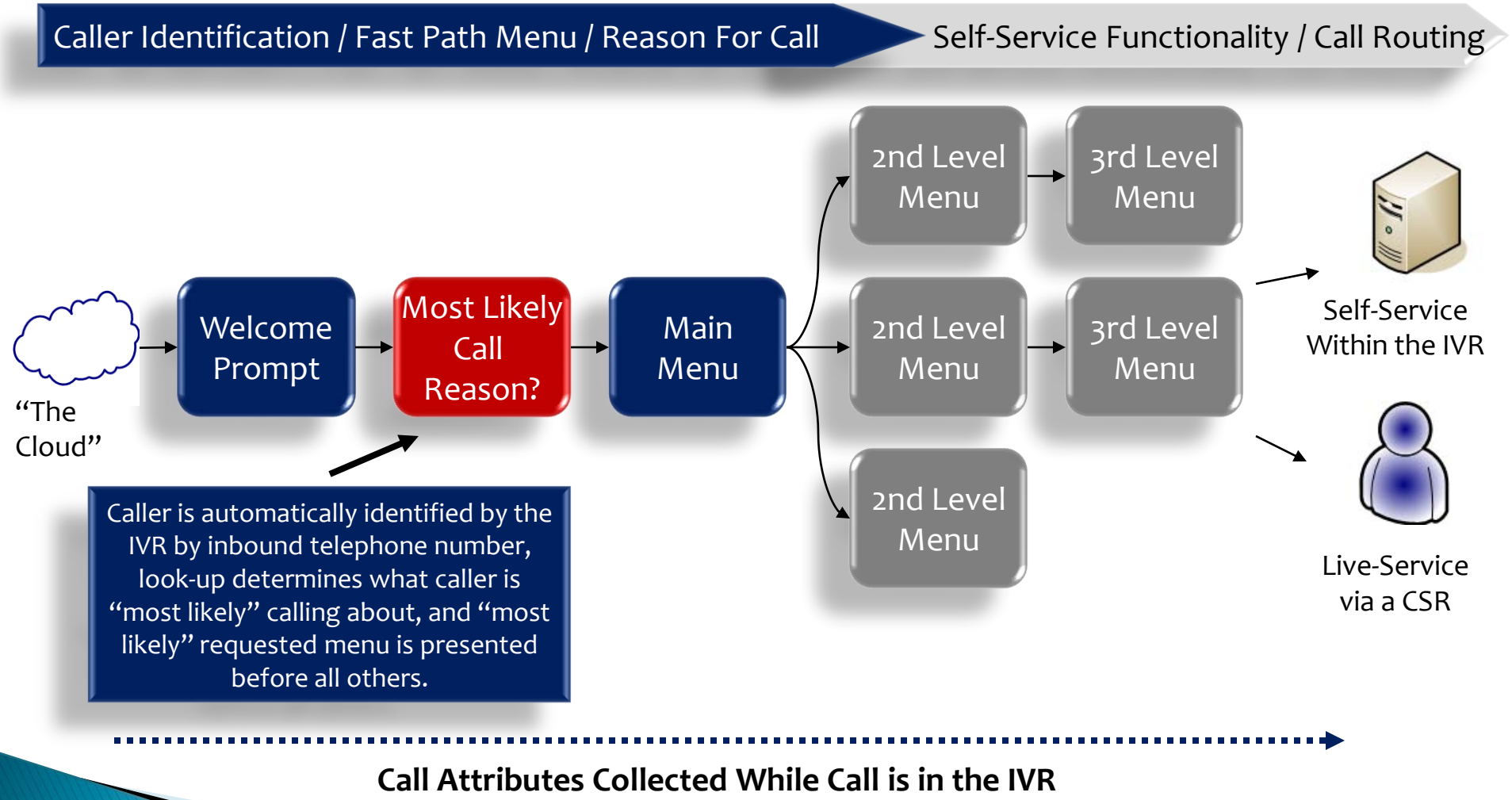
With a "Fast-Path" menu…



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Other IVR Best Practices and Ideas…

1. Fast-Pathing Capabilities
2. Outbound IVR
3. Integration with Web Site

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In Closing…

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Additional Information:

- Cost Benefit Analysis ("CBA") templates
- IVR Design Best Practices
- IVR Re-Design Standard Operating Procedures
- Call Flow examples
- Node-Level Analysis examples

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In Closing…

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Questions?

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