Effective IVR and Call Routing Design

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The Future is Constant Change
THE NEXT CX REVOLUTION IS OMNI-CHANNEL
What industries are in the room?

A. Government
B. Banking
C. Retail Goods & Services
D. Telco/Cellco
E. Insurance Home, Auto, Life
F. Insurance Medical
G. Utilities
H. Other
Is IVR too old school?
Is IVR dying?

Reports of IVR death have been greatly exaggerated.

Use of IVR is evolving within an explosion of channels.

- Back Office
- Website
- Mobile App
- Messaging
- eMail
- Social
- Chat
- Video
IVR remains critically important
IVR is not dying. IVR is evolving.

Context enables Customer Experience

DTMF

Speech Recognition

Hello!

Tell me why you’re calling.

Intelligent IVR (DTMF or Speech)

Customer Journey (DTMF or Speech)

Are you calling about...?

Can I help you finish that web form?

Genesys
In what channels do your customers contact you today?

A. Web
B. Inbound Voice
C. Chat
D. Email
E. Mobile smart phone app
F. Web co-browse
G. Social (Facebook, Twitter...)
H. US Mail
Customers really don’t want to talk to you!

Customers often prefer IVR self-service

- What’s my balance?
- Is my flight on time?
- Refill my prescription

Well designed IVR improves efficiency and customer experience
Your IVR experience should be like an escalator
I don’t want to repeat myself
I don’t want to be transferred
Respect my time, no long waits
Resolve my issue the first time I contact you

Typical IVR Goals

• ID/Authenticate callers
• Provide reasonable self-service options
• Route to skilled agent with good screen pop
One Dozen IVR Tips

- The Essentials
- The Enhanced
- The Epic
IVR Tips

1. Place menu options in decreasing order of call volume
   • Most common call reason should be option 1
   • Monitor menu peg-counts, adjust menu order

*If you want them to use it, make it easy.*
2. No more than “4 options wide and 3 deep”
   • Limits of caller patience and tolerance
   • Get lost if too many options, forget choices
   • Will start pressing “0” to get to agent

3. Description first, followed press “x” option
   • “For customer service, press 3”
4. Be concise, avoid insider jargon
   • Avoid: “For parts replacements, replacement manuals, SmartParts, or WellParts programs, press 3 now.”

5. Caller information should “follow” through transfers
   • Agents need proper screen pop of all information

You want my account number AGAIN?
6. Text to Speech versus Recorded Prompts
   • Use TTS only for dynamic prompts that cannot be pre-recorded
   • Recorded prompts always sound better

7. Sweat the concatenation and prosody “pitch” of prompts – both TTS and recorded
   • Makes speech “natural”
   • Consider phone number read back, digits with rising, flat and falling pitch

The phone number is 1 - 8 5 5 - 5 0 6 – 2 3 1 6
One Dozen IVR Tips

- The Essentials
- The Enhanced
- The Epic
8. Offer Call Back in the IVR

Offer callers immediate or scheduled call back

- Avoid having to wait on the phone for an agent
- Call back routed to right-skilled agent
- Agent gets full context popped to screen
9. **Persona** - every IVR has a persona, intentional or not
   - Reflect your brand through voice talent, prompts and in-queue music
   - Audition voice talent to reflect your brand
   - Prompts “coach” should work with voice talent

*Who writes your prompts?*
Who writes your prompts?

Dialog design is art
  • Spoken language is not written language
  • Intonation, timing, and emotion

Voice talent matters!
  • Prompts actually touch callers
  • Use professional talent and professional studio

Redesign of DTMF prompts is typically of more value than adding speech recognition.
Worst Prompts - Top Offenders

YOUR CALL

IS IMPORTANT TO US

PLEASE LISTEN CAREFULLY

OUR MENU OPTIONS HAVE CHANGED

YOUR RESPONSE WAS INCORRECT

GOODBYE
FOR ENGLISH, SAY "ONE"

FOR SPANISH, SAY "STAR"
Who do you include in your IVR design efforts?

A. IVR team
B. Call center operational management
C. Business leaders
D. Agents
E. Other?
How do you test the Voice UI of your IVR?

A. Usability Test - Wizard of Oz
B. Usability test – Prototype
C. What’s Usability Testing??
10. Use Speech Recognition? Yes and No.

Sometimes Yes

- Complex info better spoken (Address capture, stock quotes, alpha-numerics…)
- Number of “routing targets” is very large (60+) and fairly evenly distributed

Sometimes No

- Straightforward menus
- Number of “routing targets” is not too large (up to 60) and concentrated (top 10 drive 80% of calls)
- Background noise
DTMF and Speech Recognition

Touch Tone DTMF
- Numeric entries
- Alphas are awkward
- Lowest cost

For A, press 1... for B, press 2
- Simple spoken responses
- Spoken addresses, alpha#
- Needs DTMF “backup”
- Medium cost

Directed Dialog Speech
- How may I help you?
  - Open ended spoken responses
  - Still needs Directed Dialog and DTMF “backup”
  - Highest cost

Natural Language Speech
- Do you want A, B, C or other?
  - Simple spoken responses
  - Spoken addresses, alpha#
  - Needs DTMF “backup”
  - Highest cost
What input does your IVR use?

A. DTMF only

B. Press or Say “1”

C. Directed Dialog Speech “Balance please”

D. Natural Language Speech Recognition “Yeah, I want to replace my credit card, I think I lost it.”
One Dozen IVR Tips

The Essentials

The Enhanced

The Epic
11. Intelligent IVR

- Use caller context to simplify caller experience
- Impress your callers
- Often of more value than natural language speech recognition
Use Intelligent IVR

Natural Language IVR

“Please use a short phrase to tell me what you’re calling about.”

- No context
- Reactive, Impersonal
- No Knowledge of Customer

Intelligent IVR uses caller context

“Are you calling about your recent stop service request?”

- Lead with Yes/No Question
- Proactive, Personal
- Use Context of Customer Journey
Intelligent IVR Intercept

Are you calling about <topic>? Yes/No

- Lead with context, fall back on menu
- Direct route to self-service or agent
- Base route on business value
Why not just use CRM customer profiling instead of recent context personalization?

Intelligent IVR would treat these two differently, per their recent context.
IVR Reporting

KEEP CALM AND SHIFT GEARS
12. Reporting, analyze IVR performance, tune IVR

What can be tuned?
- Better order: 2, 3, 1
- High opt-out rate: 25%

Why is this Epic?

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**Peg Count Menu 36**
- Pressed 1: 15%
- Pressed 2: 40%
- Pressed 3: 20%
- Pressed 0 Agent: 25%
Epic IVR Reporting – go OmniChannel

1. IVR Purpose of Call
   - Welcome Mr. Smith. Are you calling about the status of your recent claim?

2. Yes
   - Exit Point 42
     - Eligibility

3. No
   - Peg Count Menu 36
     - Pressed 1: 15%
     - Pressed 2: 40%
     - Pressed 3: 20%
     - Pressed 0 Agent: 25%

4. Self-Service End Point
   - Transfer to Agent

5. Conversation Manager
   - IVR Maturity Levels
     1. Black Box IVR
        - In/Out counts only
     2. Visible IVR
        - Menu Peg Counts, Exit Points
     3. Intelligent IVR
        - Are you calling about...?
     4. Path Analytics IVR
     5. Omni-Channel Customer Journey
        - Lifecycle Across Channels
Routing

Go Omni-Channel
Routing Tips

- The Essentials
- The Enhanced
- The Epic
Routing Applies Across All Channels

Route caller to skilled agent as quickly as possible.
Router chooses agent using Skills + Proficiency

<table>
<thead>
<tr>
<th>Can do “X”</th>
<th>Also have “X”</th>
<th>Has achieved “X”</th>
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<tbody>
<tr>
<td>Capabilities</td>
<td>Soft Attributes</td>
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<td>• Products</td>
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<tr>
<td>• Specialized</td>
<td>• Empathy</td>
<td>• Compliance</td>
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</tbody>
</table>

Proficiency per Skill:

- Low = 3
- Medium = 6
- High = 9

- Fair
- Good
- Great
1. Use True Skills Based Routing

Skills Based Routing

- Route interactions to agents
- Router automatically load balances

Queue Based Routing

- “Routes” agents to queues of interactions
- Manual “reskilling” of agents to different queues to maintain service levels
Hard Truth – Many projects go bad

Do not recreate an existing, outdated queue-based contact center.

Your team needs a **paradigm shift** to skills based routing, WFM, reporting.

How can you explore this?
2. Evaluate your Contact Center Maturity

FOUR STAGES OF CX MATURITY

RANDOM
- Ad hoc CX only
- Few channels offered
- Operational view

CONSISTENT
- CX isolated within channels
- Multiple channels but siloed
- Operational view

DEFINED
- CX integrated across channels
- Multiple channels integrated
- Business view

DIFFERENTIATED
- CX drives business
- Omni-Channel integration
- Customer Journey/Lifecycle view

CX STRATEGY
- ROADMAP:
  - CURRENT
  - PHASE 1
  - PHASE 2
  - IDEAL

CURRENT
- PHASE 1
- PHASE 2
- IDEAL

GAP
The Pain of Siloed CX Channels

Difficult to...

Route interactions to blend agents across channels
Rollup reporting across channels
Admin & Forecast agents across channels and monitor adherence
Proactively engage customers across channels & time
TIME
FOR
CHANGE
Unified CX Platform

- IVR/Voice
- Outbound Voice
- email
- SMS
- Mobile
- Social
- Back Office
- Chat
- CoBrowse
- Video
- Web

Intelligent Routing
Reporting
WFM
Agent Desktop
Agent Quality Management
Speech & Text Analytics
Customer Journey Analytics

Conversation Manager

Business Systems
- Marketing
- Sales
- Compliance
- BPMs

CRM System of Record

Genesys
CUSTOMER EXPERIENCE PLATFORM
3. Embrace Performance Routing

Who is it?
What do they want?

- Account #, ANI, DNIS...
- History, profile, value
- Likely ask from customer?

Identify

How to treat customer?

- Business logic/rules
- Valuable customer?
- Next best action

Segment

Map Resources

Right agent available?

- Check agent states, profiles (skills + proficiencies)

Skills Based Routing Decision

Route to best agent

- Push to desktop with context

Route Interaction

Attached Data per Interaction
What you know about an interaction.
Updated during the life of an interaction.
4. Relax Your Service Levels

Often see 80% in 20 seconds as “standard” in call centers. What is this based on?

- Time for three or four rings?
- Time before a caller abandons?
- Data published in an ACD system manual?

Relax Maximum Wait Time
Set Service Level as 99% of calls in a defined period of time… 120s perhaps
NPS Not Impacted

80%/20s → 99%/120s
Observe NPS to Relax Service Levels

Based on customer research at a major US bank

Customers begin finding wait times unacceptable

Customers finding wait times unacceptable double

Nearly all customers find wait times unacceptable

Use this time to route to best agent, boost NPS, save $$

Why 80%/20s???

Measure per transaction NPS
Priority clients that should still be answered immediately
Relax service levels to 99%/120s

Based on customer research at a major US bank
5. Routing with Customer Segmentation

Many companies miss this. Guard against churn.

Engage your most valuable customers.

Deflect your most costly customers.

Many companies do this well.
Routing Tips

- The Essentials
- The Enhanced
- The Epic
6. Visual IVR

Smart phone customers

• Hybrid visual + voice
• Caller can bypass IVR
• Provides context to agent
Visual IVR: Bridging Voice and Handset

- Reduce Voice Traffic
  - Redirects Voice to Digital

- Improve Routing
  - Better routes Digital to Voice

- Reduce Handling Cost
  - Hybrid Voice and Digital
Use case – port a mobile number

Visual IVR guides customer through self-service
Visual IVR - Routing 2.0

Personalized options
- Offer likely contact reasons based on context and customer profile
- Offer specific content on company website

Bots - Integrating Text Analytics
- Natural interaction
- Can respond with self-service options, knowledge articles or agent assistance

Hi, I’m Kate, your personal self-service bot. How can I help you?

Message

Check My Balance
Buy a Product
Talk to an Agent
7. Back Office Routing
You have a Back Office

Your workers process non real time work items. Emails, orders, follow-ups, overnight batch rejects...

Bring the visibility and discipline of the contact center to your back office team.
Why “route” items in your Back Office?

In a typical back office, 17 minutes of every hour are unproductive and wasted.

Source: The Future of BPM
Challenges managing your Back Office

- Reporting – how long does it really take per work type item?
- Assignment & distribution of work items is often done manually.
- Cherry picking, fall thru cracks.
Today, work is pulled from various workbins

**CRM, BPM, & Business Applications**

Tasks assigned to workbins by supervisor staff

Manual selection of tasks across workbins

- **Incoming requests**
- **CRM**
- **BPM**
Tomorrow, work is pushed to optimal Rep

Prioritized Global Task List based on business SLAs

Automatic work allocation across departments / resources

CRM, BPM, & Business Applications
Where does back office worker time go?

A. Pull Item  SAP, email, Excel, etc.
B. Pull Data  Multiple systems and applications.
C. Navigate  Get to the right screen to do the work.
D. Agent Do the Work  Time required to complete the task. Just like today.
E. Self-Report  Activity tracker, tick sheet, daily Excel file, etc.
F. Wait  Time between tasks not measured.

Genesys will Automate
A. Inventory Items  Compile/inspect inventory of work items to be processed.
B. Distribute Items  Distribute work items.
C. Report  Create reports/dashboards on back office team performance.
D. Redirect Problem Items  Track and redirect problem items not completed to be handled.
8. Micro Apps
Genesys Micro Apps

SIDE BAR
Entry point to all micro apps

CHAT
Knowledge integrated chat micro app with ability to escalate to Co-browse

KNOWLEDGE
Search your web or use Knowledge Center to manage your enterprise knowledge
**LIVE ASSISTANCE**
Access all channels of communication that could lead you to an agent from one easy to access location.

**APPOINTMENT & CALLBACK**
Locate and schedule an appointment with a representative at a branch. Notify customers about their upcoming appointments.

**OFFERS**
Use Web Engagement to serve ads, notification, recommend knowledge articles.
Mobile optimized, all form factors
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<th>Want more?</th>
<th>Breakout Sessions on Tues, Wed</th>
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<tr>
<td>Avaya</td>
<td><strong>Tues 4:15</strong> BUS-ESS-302 Avaya Users: We Help You Mitigate Risk</td>
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<tr>
<td>Looking for a simple DIY</td>
<td><strong>Tues 3:15</strong> BUS-ESS-101 Is Your Contact Center a Fixer Upper? DIY</td>
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<tr>
<td>Routing</td>
<td><strong>Tues 4:15</strong> BUS-ESS-202 Getting Skills Right</td>
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<td>Add Digital Channels</td>
<td><strong>Tues 2:15</strong> BUS-ESS-300 RIP Call Center of Old</td>
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<td><strong>Wed 1:30</strong> BUS-ESS-111 The Beginners Guide to Digital Transformation</td>
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<td>Bots</td>
<td><strong>Tues 2:15</strong> BUS-EP-500 Future + Tech + You = Wicked Smart</td>
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<td><strong>Tues 4:15</strong> BUS-EP-602 Blended AI: Bots and Automation, Human Touch</td>
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<td>SalesForce</td>
<td><strong>Tues 3:15</strong> TECH-PEN-201 Genesys + Salesforce = Amazing</td>
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I’m on Avaya, what next?

Book a PureBridge Assessment
- Visit main Genesys booth
- [www.genesys.com](http://www.genesys.com) search “purebridge”
Questions? Thank you!

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