

The Modern IVR Capability Guide

Traditional IVR systems efficiently route routine inbound inquiries. But, as communication channels and customer demand has increased, a need for Modern IVR solutions has emerged. A Modern IVR ensures continuity across phone calls, predicts the caller intent, proactively calls customers when personally relevant information becomes available, and lays the foundation for embracing digital channels such as text messaging, automated agents / chatbots and compatibility with new consumer devices such as Amazon Echo.

This guide will walk you through the full range of IVR/self-service capabilities available today to determine what functionality you believe would be valuable to your organization. It covers the following:

- Section 1: Capabilities For A Superior Customer Experience
- Section 2: Business Owner Priorities
- Section 3: Technical User/Developer Priorities
- Section 4: Emerging Trend: Are Chatbots Relevant For You?
- Section 5: Your Environment Today

Once you've familiarized yourself with the information in the guide, use [this link](#) to go to the online form and enter your selections. You will select from the options below for each capability:

- Already Have
- Essential
- Nice to Have
- Would have no value

When you complete your checklist, a notification will be sent to an Aspect representative, who will generate your personalized capabilities report and send it to you.

1) Contact Information

First Name: _____

Last Name: _____

Title: _____

Company: _____

Email Address: _____

Phone Number: _____

Number of Agents: _____

Section 1: Capabilities For A Superior Customer Experience

IVR systems are a highly efficient tool for routine inbound inquiries and common outbound notifications like appointment reminders. You can also use an IVR system to collect customer responses and let callers self-serve, thereby deflecting calls from your contact center agents. IVR solutions can be used to create highly customized applications around specific business cases. Automating these everyday customer interactions results in quick and easy customer access to the right information at the right time – freeing up your agents for more complex customer issues and de-escalation tasks.

Foundational capabilities include:

2) Touch Tone

Allows for input of information to the IVR by pushing numbers on a touch-tone telephone.

- Already have
 - Essential
 - Nice to have
 - Would have no value
-

Automatic Speech Recognition (ASR) helps flatten menus and provide quicker access to information, as menus no longer need to be traversed one by one, and callers can say their needs with a few words.

3) Basic ASR

Speech inputs are restricted to zero through nine and yes or no.

- Already have
 - Essential
 - Nice to Have
 - Would have no value
-

4) Directed Dialogue

Menu structure instructs the contact to respond with pre-defined responses. This is typically restricted by a vocabulary size. For example, a bank may prompt a customer to “say checking account.”

- Already have
 - Essential
 - Nice to Have
 - Would have no value
-

5) Open Dialogue

Contact is able to respond in an unstructured way and is not restricted in vocabulary.

- Already have
 - Essential
 - Nice to Have
 - Would have no value
-

6) Text to Speech (TTS)

Speech synthesis that can read back text into spoken voice. IVR applications can typically read back numbers and letters as part of the base application, but need Text to Speech software to read back unstructured information such as status information contained in highly dynamic operational data stores.

- Already have
 - Essential
 - Nice to Have
 - Would have no value
-

7) PCI-DSS Compliance

Ability to securely handle payment card information while complying with the highest security standards. This typically supersedes the requirements of HIPAA for secure handling of health-related information.

- Already have
- Essential
- Nice to Have
- Would have no value

8) Cloud IVR

Ability to have the IVR solution hosted in a public or private cloud to capture cost savings, reduce support for on-premise systems, and speed deployment and updates.

- Already have
- Essential
- Nice to Have
- Would have no value

Some common advanced IVR functions include:

9) Context Continuity

Context is preserved across channels (e.g. after a dropped call, or from website to IVR, or from IVR to agent) so customers do not have to repeat information.

- Already have
- Essential
- Nice to have
- Would have no value

10) Caller Intent Prediction

Ability for the IVR to predict the intent of the caller based on recent transactions (e.g., orders, tickets opened, reservations, outages in caller's area) and provide the answer right away before presenting the full menu options.

- Already have
- Essential
- Nice to Have
- Would have no value

11) Adapt-to-me Personalized Interactions

Make the IVR more human-like by adapting to the caller's experience (novice vs frequent caller), speed/pace of interaction, longevity, or customer loyalty program (e.g. silver, gold, platinum).

- Already have
- Essential
- Nice to Have
- Would have no value

12) Proactive Outbound Notifications

Ability to call customers proactively with prerecorded notifications and reminders (e.g., appointment confirmations, payment reminders, outage notifications), AND allow them to interact and make changes without requiring an agent to, for example, change an appointment, or make a payment.

- Already have
- Essential
- Nice to Have
- Would have no value

13) Visual IVR

Make the IVR easier to navigate and follow by visualizing the IVR options on a smartphone screen as mobile Web pages, allowing contacts to touch their way through the IVR, enter information or choose options. Visual IVRs are useful for long or deep IVR menus and when the consumer is in noisy environments or meetings.

- Already have
 - Essential
 - Nice to Have
 - Would have no value
-

14) Text2IVR

Can significantly reduce cost by allowing use cases such as name and address capture or entering alphanumeric codes (e.g. to retrieve order status) by texting the IVR vs speaking, no longer requiring a live agent. The caller does not disconnect from the IVR and the IVR flow continues based on the input received.

- Already have
- Essential
- Nice to Have
- Would have no value

15) In-Queue Self-Service

Provide the option for consumers to have the system queue a call back at a later time, while offering mobile self-service while they are waiting for the callback. Often the mobile services can answer the customer's questions, freeing up the call center from the callback, further reducing cost while improving the customer experience.

- Already have
- Essential
- Nice to Have
- Would have no value

Section 2: Business Owner Priorities

In an age where consumers are mobile, self-reliant and demand fast, convenient access to information, the customer experience is the battleground for winning and keeping customers. Businesses can improve the customer experience while reducing costs by improving and updating their current IVR system. Some common priorities for business owners include:

16) More Control to Make Updates

Ability for business users to make updates in minutes to specific configurable items themselves, without involving IT or a vendor (e.g., seasonal call center timings, outage messages).

- Already have
- Essential
- Nice to Have
- Would have no value

17) Faster Time to Market for Changes

Ability to more quickly add new functionality to the existing IVR system, such as adding menu branches, incorporating a new line of business, or changing business logic to accommodate changes in business processes.

- Already have
- Essential
- Nice to Have
- Would have no value

18) Deeper Insights from Advanced Reporting and Analytics

Ability for business users to receive standardized reports on key IVR performance metrics like retention rate, dominant paths, business task success rates, etc.

- Already have
- Essential
- Nice to Have
- Would have no value

19) No Rip and Replace

Ability to enhance IVR flows with new capabilities without ripping and replacing existing IVR/ACD engines that might integrate with existing business applications.

- Already have
- Essential
- Nice to Have
- Would have no value

20) Future Proofing Investment for New Self-Service Channels

Ability for IVR platform to allow self-service interactions to be designed and deployed on new channels (e.g. Facebook Messenger, Web chat, or Amazon Echo), without requiring a new custom solution for each new channel.

- Already have
- Essential
- Nice to Have
- Would have no value

Section 3: Technical User/Developer Priorities

Getting an IVR up and running or making changes should happen in a timely manner. To do this, the technical team needs access to the right tools. Priorities important to technical users and developers include:

21) Single Platform for Both Development and Deployment

Ability to develop an IVR flow from design to testing to deployment and monitoring within a single platform that enables speedy script development and eases migration.

- Already have
 - Essential
 - Nice to Have
 - Would have no value
-

22) Hotspot Analytics

Ability of the platform to suggest improvements to IVR flows directly within the development environment, without needing access to the corporate Business Intelligence systems.

- Already have
 - Essential
 - Nice to Have
 - Would have no value
-

23) Cross-Platform Support with Robust Documentation

Availability of APIs and SDKs to support integration to any business application.

- Already have
 - Essential
 - Nice to Have
 - Would have no value
-

24) Easy, One-Click Documentation

Automated project documentation with the ability to easily export dialog flows and object overviews for reference in customer meetings or to archive work.

- Already have
 - Essential
 - Nice to Have
 - Would have no value
-

25) Beyond IVR

Ability to design/replicate IVR flows in days versus months to digital self-service channels like SMS, Facebook Messenger or Amazon Echo, all on one platform.

- Already have
 - Essential
 - Nice to Have
 - Would have no value
-

Section 4: Emerging Trend – Are Chatbots Relevant For You?

Chatbots using AI-based natural language understanding are increasingly deployed by companies looking to provide cost-effective, instant answers to customer questions on messaging channels. If the chatbot cannot successfully discern user intent or answer the customer's question, it can "transfer" the dialog to a customer service representative in the contact center.

26. Do you think chatbots are relevant to your business?

- Yes
- No

27. Do you feel chatbots are more relevant for:

- Marketing
 - Customer Service
 - Other, please specify
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28. How would you describe your knowledge and use of chatbots/AI and digital self-service channels?

- Not aware
- Aware but no plans to use in the next 12 months
- Developed use cases to pilot
- Researching market for/talking to vendors
- In chatbot pilot
- Vendor chosen, chatbots deployed

Section 5: Your Environment Today

29. What kind of self-service speech IVR do you offer today?

- No IVR at all:** Customers go straight to first available agent
- Auto-attendant:** IVR mainly helps identify customer intent so the call can be routed to the right team of agents
- Speech self-service:** Customers can complete one or more tasks within the IVR without the assistance of an agent

30. What is your IVR containment rate (average IVR containment is ~38%)?

- <30%
- 30-50%
- >50%
- Don't know

31. Beyond voice IVRs, is self-service available through other interactive channels (e.g., SMS, mobile app, Facebook Messenger or other social channels)?

- Yes
- No

32. Are you currently using chatbots for any customer interactions? If so, please describe.

- Yes
 - No
-

33. Do you have any plans to study or deploy chatbots for your business in the next 12 months?

- Yes
- No

34. How do you measure the level of customer satisfaction with your IVR experience?

- NPS/other score
 - Do not measure/don't know
 - Don't want to share
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35. If your current IVR experience has low satisfaction, what are the top 3 reasons? Select all that apply.

- Menus are hard to follow (too long or too deep/nested)
 - Speech recognition rejects accents and noisy environments
 - IVR only routes calls versus actually helping complete customer task
 - Customers have to repeat information when transferred to agent
 - System not aware of customer when calling, not predicting reason for call (no smart CRM integration)
 - Other (please specify)
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36. If your current IVR experience has high satisfaction, what are the key features that you think are responsible for this? Select all that apply.

- Easy-to-understand menus, easy to navigate
 - Speech recognition works well
 - IVR enables users to complete some tasks with self-service vs simple routing to agents
 - Callers don't have to repeat information to agents already provided to IVR
 - IVR predicts reason for call, thus completes more calls successfully
 - Other (please specify)
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