IVR CHEAT SHEET FOR BUSINESS

This tip sheet has been designed to provide companies with the essential guidelines for designing a customer-friendly IVR system.

First and foremost, you should always consider your IVR system a "work in progress" that should be continuously monitored to provide the best service to your ever-changing customers. That being said, here are 10 best practices in IVR design to make your system efficient and effective for both you and your customers.

1 Let callers know what to expect from the system immediately. This is a simple rule that applies to any customer experience - present a pleasant greeting and explain succinctly what the system can and will do for the caller.

2 Do not hide the option for callers to speak with a live agent. No matter how useful your IVR system is for customers, there will always be times when customers want and need to speak to a live agent to resolve their issue.

3 Whenever possible, give the caller an approximate time for the completion of the request. If transferring to a live agent, let the caller know the expected hold time and provide options to go back into the IVR system.

4 Do not make callers repeat information collected in the IVR to the live agent they are transferred to. If you want callers to believe that the IVR can help them resolve a problem, respect the time they put into the IVR and don't ask for the same answers twice. Genesys offers a variety of options for passing captured IVR information to the live agent, including call whisper and screen pop functionality.

5 Provide callers with an option to navigate the system using touch-tone (keypad) or speech recognition. Let callers choose the most effective option based on their general preferences, location or understanding of the system.

For instance, someone calling from a cell phone in their car may find it difficult to make menu choices using the phone keypad, but will be able to make those same choices using speech without any hassle. In the Genesys system there is also a setting called "barge in" that can be turned off to make a speech enabled system run smoother when there is a lot of background noise on the caller's end.

6 Personalize the IVR for each caller by integrating with your customer databases and CRM systems. If callers know that the system recognizes their identity, they will be far more likely to stay in the IVR.

7 Identify and communicate a few universal commands that are recognized at any time during the call.

Examples include "beginning" to go back to the start of the dialogue and "help" to get detailed information on the current request for input.

8 Keep the interface simple - use closed, short prompts, limit the number of menu choices and request simple, one-word responses. Callers will only use the IVR system if they perceive that it is easy to use and useful in resolving their issue or information request.

9 Always let the caller know what is happening. Keep in mind that the IVR dialogue should be similar to a conversation between two human beings. The system should explain pauses with messages such as "Thanks for the information, let me look up your account" or "I am trying to find the most appropriate person to handle your request".

10 Provide courteous, smooth error-handling. Generic error messages that are not tailored to the caller's specific situation will drive callers away from the IVR. The system should always take the blame for errors.

The Last Word:

We've provided a list of some of the core characteristics of customer-friendly IVR systems to get you started, but the easiest way to discover the effectiveness of your IVR system is to survey the callers who use it. Genesys can set up a short IVR phone survey which can be attached to the end of any call and report the results directly back to you for use in improving the IVR system.

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About Genesys

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