



Waterfield Tech

Outrageously Great IVR Planning Guide

The 9 key principles to design, develop and
deploy smart, connected conversational IVR
applications

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01

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Introduction



IVR IS BROKEN — AND IT'S TIME TO FIX IT.

Let's face it: very few customers actively enjoy calling a company's IVR.

At best, it's a quick and painless experience. At worst, it's a deeply unpleasant one. The endless cycling through options to try to reach a real person. The embarrassment of having to shout 'YES', 'NO', 'TO REPORT A FAULT' over and over in a quiet office. The frustration of being cut off mid-call for no reason.

It's frustrating for customers, and embarrassing for the brand, and it shouldn't be this way. The IVR is the gateway to the business. It should offer a warm and helpful welcome, but more often it feels like a boarded-up door designed to keep people out.

The problem is that truly great IVR experiences are hard to design and build, and even good ones can quickly fall into neglect and decay if not properly maintained.

IN THIS GUIDE:

9 design, development and deployment principles for a truly great IVR

If your current IVR is more “abandoned mineshaft” than “concierge service at the Ritz”, this guide is for you. It sets out nine principles for designing, developing and deploying an outrageously great IVR: one that gives every customer a five-star experience – and helps your organization achieve its business goals, too.

Along the way it covers everything from customer-centric design principles to data-driven personalization, choosing the right development tools and implementing appropriate governance.

We use these principles on every client project we work on. In doing so we’ve helped big organizations on both sides of the Atlantic to reduce contact center costs, increase customer happiness, and bump up their revenues. We’re confident they can help you do the same.

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Principle #1

Design with the Customer in Mind

Understand what customers are calling about, the language they use and how they use the current IVR — before starting to design a new one.



DESIGN WITH THE CUSTOMER IN MIND

DESIGN WITH THE CUSTOMER IN MIND

A fundamental problem with a lot of bad IVR is that it's designed by business analysts to meet business goals.



Internal requirements-gathering may throw up things like: “reduce calls to agents by 50%”, “deflect 40% of calls to the website”, and so on. Those requirements are then turned into mechanical call-flows designed to achieve those objectives. The actual customer experience is something of an afterthought, if it's even considered at all.

The customer immediately gets the impression the IVR is designed to benefit the company, not them – and their satisfaction rates are all downhill from there.

HOW IT SHOULD BE DONE:

From the start, design with the customer experience in mind. That means using a skilled Voice User Experience (Voice UX) designer and researcher - as opposed to a business analyst - to really understand both the customer's needs and the needs of the business and design an experience that aligns the two.

In practice, this means spending time sitting with contact center agents and listening to calls to understand what people are calling about, why they've called in the first place (e.g., did they try to do something on the website and then call when it didn't work?), the language they use and the way they think about a task.

A Voice UX designer can also learn a lot about the current IVR by looking at reports from the system (if they exist, that is — see [Principle #8](#)) and talking to agents. A caller will sometimes tell an agent if they found the IVR frustrating, and these complaints can be a rich source of design 'inspiration'!

The UX consultant can then combine the information from calls, the contact center and data reports with other aspects relevant to the project in a high-level approach to design, such as:

BRAND INFORMATION: What are the company's objectives for things like tone of voice and look and feel?

COMPETITOR ANALYSIS: What's the call experience like with other companies?

USAGE ON OTHER CHANNELS: What's it like for customers to do the tasks on the website or smartphone?

TECHNICAL FEASIBILITY: What are the options currently available for things like data access, storing and sharing?

The findings from these context-gathering exercises will then inform a customer-centric design that should be tested with customers at every iteration, rather than being delivered as a finished app at the end of a waterfall-style development process. Modern customer experience design principles emphasize test and learn, but this doesn't have to be expensive and time-consuming. Testing can be done quickly and effectively using a prototype app and a small but representative group of users; five or six are usually enough to surface most issues. Feedback should be incorporated back into the next iteration.

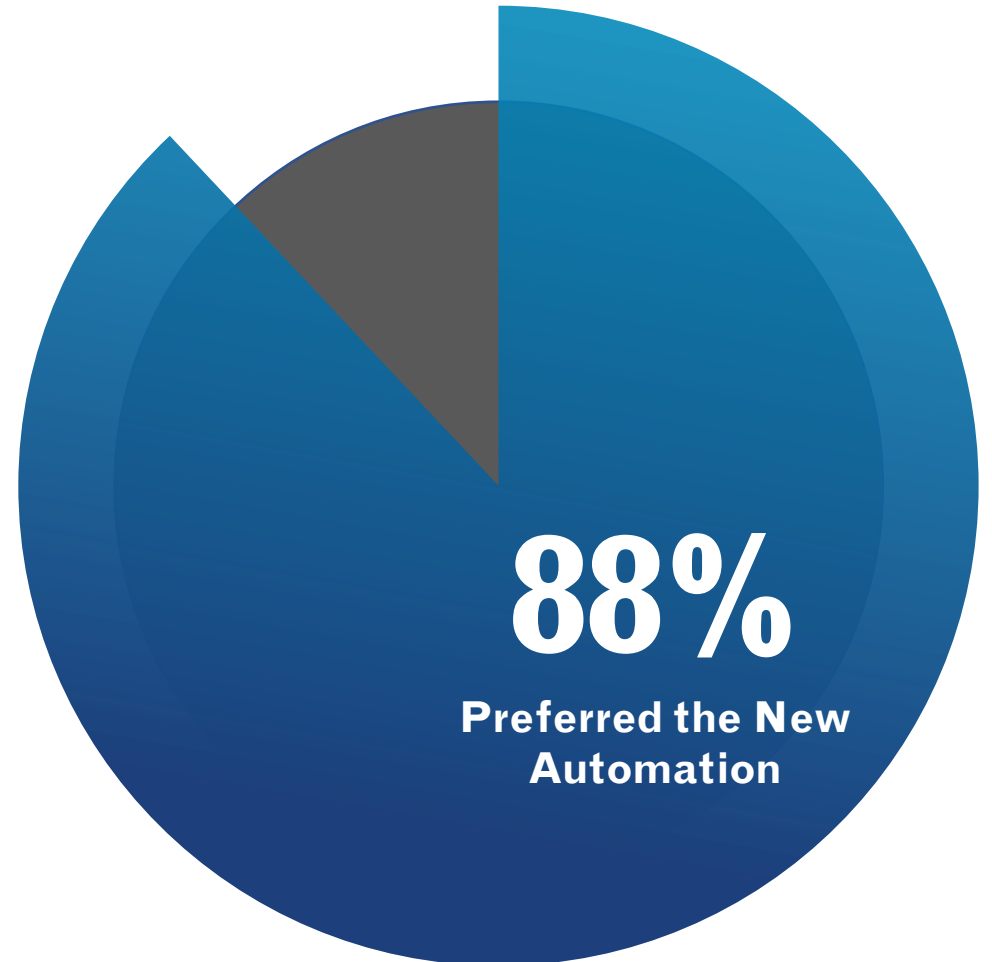
Testing and iteration shouldn't stop when the final app is delivered one hallmark of a great IVR is that the team continue to review its use and make incremental changes in line with customer needs so the dreaded 'IVR rot' (see [Principle #6](#)) doesn't set in.

PRINCIPLE #1 IN ACTION: SHOP DIRECT GROUP

Shop Direct wanted to increase IVR self-service of non-sales calls, while improving the IVR customer experience and reducing misdirected internal transfers.

Waterfield Tech conducted a call analysis exercise, which revealed that 50% of callers were calling with the aim of buying something. So, as part of a new customer-centric IVR design for Shop Direct Group, we incorporated a simple question at the start of the IVR flow to create a faster and easier experience for would-be shoppers.

The new design had an immediate effect on customer satisfaction. In a survey of 1,000 callers, 88% said they preferred the new automation, with 50% giving the new IVR a 10/10 rating.



“

You've got to start with the customer experience and work back toward the technology, not the other way around.

”

Steve Jobs

03

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Principle #2

Design Conversations, not Call Flows

Make sure your IVR feels and sounds conversational – and test and refine until it does.



DESIGN CONVERSATIONS, NOT CALL FLOWS

DESIGN CONVERSATIONS, NOT CALL FLOWS

IVRs are different from other contact channels because they attempt to mechanize a very non - mechanical process: human conversation.



The reality of human conversation is that it doesn't flow in a logical, linear direction from A to B. People misunderstand or mishear things, ask for clarification, and re-phrase things to make themselves better understood.

Spoken words are transient, too: there's no way to look back over a voice conversation and see what's just been said. If a caller doesn't understand something, repeating it in the same words just prolongs a frustrating experience and underscores the fact they are talking to a machine; something that makes people highly uncomfortable. Worse, some IVRs give callers the sense that they are somehow to blame for not understanding — never a quick route to customer happiness!

Unfortunately, most IVR design environments are focused on call flow above all else – and when linear, mechanical call flows are designed by business analysts looking to meet business goals, the art of conversation is lost.

HOW IT SHOULD BE DONE:

Listening to customers and getting a proper Voice UX designer to design the IVR is a great first step (see [Principle #1](#)). But designing an IVR that feels like a real conversation needs a design approach that accommodates a host of considerations, including:

PERSONA: Your persona is the voice of the IVR and should be played by a trained voice actor. The persona is more than just a voice; he or she is a character that engages your callers and embodies the brand values of your organization.

MELODY: Does the persona sound like a real, empathetic person? Do they talk in a natural way? Do they have the right accent? Do they pronounce things — phone numbers, for example — in the way the customer expects? Is it all clear and easy to understand? In short, does the interaction feel like a conversation with a human being?

COLLABORATION: Real-life conversations are co-operative, with both parties collaborating to arrive at a clear understanding. If the system doesn't understand what a caller said, does it help move things forward in an easy, natural way— or does the IVR just repeat the same thing before dismissing them?

When designing a natural IVR conversation that takes these considerations into account, it helps to write it at first as a screenplay, with dialogue, rather than starting with a logical call flow with boxes and arrows. That means using a designer with an ear for natural dialogue and a design tool that lets you design in that way.

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Principle #3

Use 'Small Data' for Low-Level Personalization

Forget about big data (at least for now): "small data" can make a big difference when it comes to IVR personalization.



USE 'SMALL DATA' FOR LOW-LEVEL PERSONALIZATION

A lot of the current buzz in customer communications is around big data – using everything you know about an individual to drive deeply personalized communications.

In theory, IVR is no exception, and organizations embarking on a complete, data-driven, omni-channel integration project shouldn't leave IVR out of the fold. Intelligent use of data can create an 'ideal scenario' in which the IVR greets the caller by name (for example), congratulates them on the birth of their new baby, correctly asks if they're calling to register their child after having tried to do so on the website, and routes them to the right agent.

Most IVR today is so shockingly bad that even tiny amounts of data about the caller's context, used in the right way, can transform the customer experience and resolve their calls much faster.

HOW IT SHOULD BE DONE:

Such 'small data' treatments could include:

- Recognizing the customer has an overdue bill to pay – and giving them that option first.
- Knowing the caller's order has been delayed and giving them the option upfront to report an overdue delivery.

- **Seeing that the caller is calling from a place where there's a known problem or outage and playing them an appropriate message.**
- **Knowing the caller has called before, acknowledging it's not their first call, and providing an appropriate set of options.**

Far from requiring a massive enterprise data integration project, this sort of low - level IVR personalization requires only a few, judiciously - chosen point integrations, and well-planned call flow options to incorporate the data.

The key to getting this right is twofold. First, you must understand the top 4-5 reasons people call the IVR (via a call analysis exercise as described in [Principle #1](#)). Then you need to look for ways to connect the caller's number — a unique piece of data that identifies them to the IVR system before the call starts – with other relevant data about that customer, to enable the IVR to make an informed guess at the reason for their call.

Once you can make that type of connection, you can create a set of tailored call flows and play the most appropriate one to the caller, depending on their likely reason for calling. For example, if the caller's number correlates with an open order in your order management system, you could infer they are calling about that order, and have the IVR give them the option to report a problem with their order upfront.

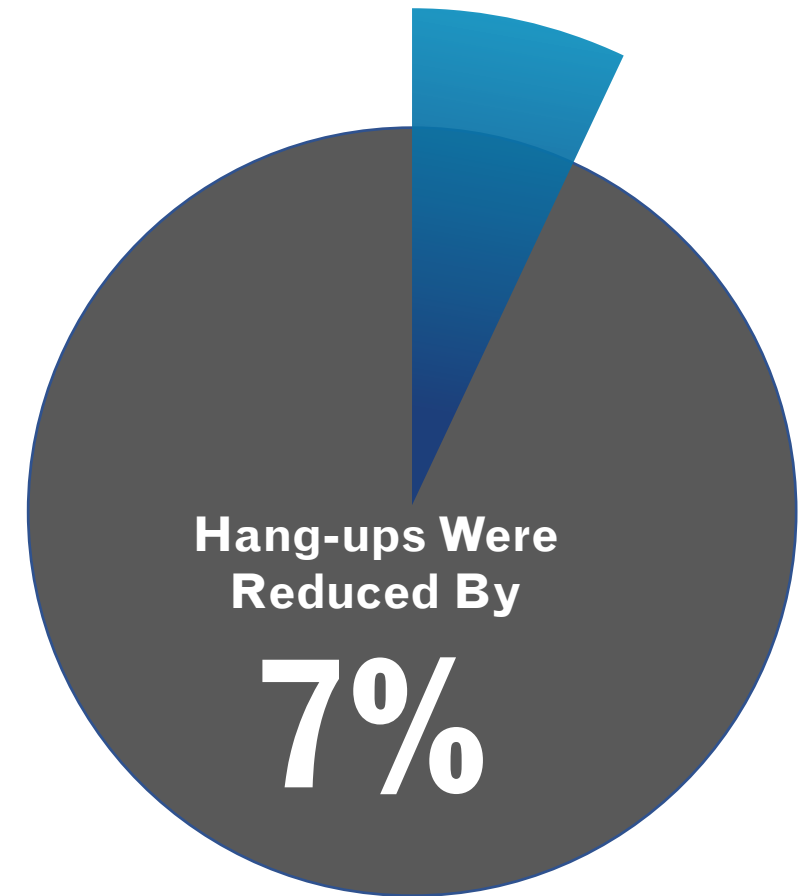
This must be done with a reasonably high degree of confidence that the resulting personalization will be helpful to the caller, rather than making things more frustrating. But if you know that eight out of ten calls to the IVR are to pay a bill, or to report a missing order, then it can pay dividends — for the customer and for your business — to make that correlation with the appropriate database and give the caller the 'right' option upfront.

PRINCIPLE #3 IN ACTION: RETAIL PHARMACY CHAIN

A major US pharmacy chain wanted to increase levels of engagement and automation in its IVR. We worked with them to analyze calls into the existing IVR and correlate them with data held in the CRM database. We found we could reliably predict when customers were calling for a prescription refill, or to check on the status of an order. At the same time, we also streamlined the interaction for frequent callers. The new, personalized, and proactive dialogue gets straight to the point:

“...I looked up your phone number and found an account, there’s a prescription due for refill. Would you like to take care of that now?”

The results were stunning: overall automation rates nearly trebled, while hang-ups reduced by 7% and the average call duration was reduced by 15 seconds.



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Principle #4

Make it Easy for Contact Center Staff to Modify on the Fly

Empower contact center staff to modify the IVR — but give them the prompts, tools and training to do it properly.



MAKE IT EASY FOR CONTACT CENTER STAFF TO MODIFY ON THE FLY

MAKE IT EASY FOR CONTACT CENTER STAFF TO MODIFY ON THE FLY

Circumstances change all the time in the real world, and a good IVR is one that can keep up with those changes.



For a retail organization, the launch of a new product may lead to a flood of enquiries. For a local authority, a real flood may lead to a huge surge in calls for sandbags and pumping equipment.

Contact centers need to be able to manage these peaks and resolving specific enquiries within the IVR is one way to do it. That means making the IVR flexible enough for nontechnical staff to modify it — without damaging the customer experience.

While your IVR is a business-critical application and significant changes should not be taken lightly, it should still be easy to change things like routing destinations and opening hours without any risk of breaking the experience. (For bigger changes, you need an efficient delivery process — see [Principle #6.](#))

The ability to insert broadcast messages can help contact center staff make small changes to the flow – to handle sudden spikes in call volume, for example — but there's a right way and a wrong way to do it.

Too often a hastily-recorded broadcast message is tacked on to the beginning of the call flow, so every caller must sit through it, whether it affects them or not. And then no one sets the message to expire or remembers to remove it afterwards, so every caller must sit through a message about a water leak that happened last week and has long been fixed.

The exact placement of a broadcast message in an IVR call flow may seem a small consideration — but it’s the kind of thing that deeply colors a caller’s perception of the brand.

HOW IT SHOULD BE DONE:

This is something that’s easy to fix with the right planning, the right tools and a bit of practical training for contact center staff.

- Rather than having a contact center agent hastily record a message in a voice that’s different from the IVR persona, have the original voice actor record a bank of potential broadcast messages in advance. Then make them available to drop into the call flow when needed.
- Train contact center staff to recognize where a broadcast message should fit into the call flow, so they place the message there, rather than upfront where everyone must hear it.

- Consider data-driven broadcast messages, which are only heard by specific customer groups, or interactive messages, which play a short message and then let customers request more information if they need it, so you can provide more information to those that need it, and don’t frustrate everyone else.
- Do some training (or refresher training) in how to set messages to expire or set alerts to remove them manually when they’re no longer needed.

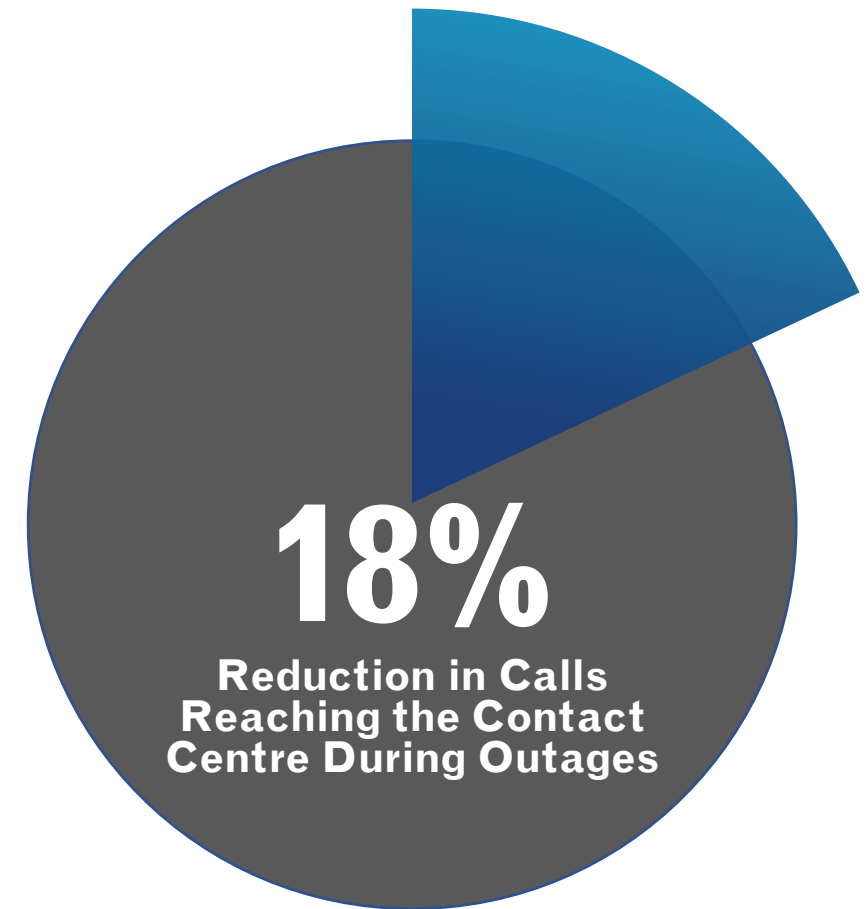
Again, there’s nothing dramatic here — just small adjustments in the way you manage your IVR that can deliver huge returns in terms of increased customer satisfaction, faster call resolution, and other key customer service metrics.

PRINCIPLE #4 IN ACTION: **FLOW**

FLOW is the largest telecoms operator in the Caribbean. It needed a way to manage unexpectedly high call volumes during major incidents, such as when phone lines are down or there's a broadband outage.

Waterfield Tech implemented a data-driven, interactive broadcast message system with the aim of containing more calls within the IVR.

The simple, easily-insertable messages deflected 500,000 calls during the first eight months of operation – representing an 18% reduction in calls reaching the contact center during outages. One-third of callers also opted to receive updates via **SMS**, further reducing call volumes.



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Principle #5

Think Tactically About Channel Integration

Don't wait for a big-bang investment in omni-channel – use tactical tools to make useful, small-scale channel integrations that make a big difference to the customer experience.



Think Tactically About Channel Integration

Along with 'Big Data', Another
Buzzword of the Moment Is
'Omni-Channel'.



Many organizations have a vision in which all channels are fully integrated, all draw on a single customer record, and all interactions are guided by real-time insights from multiple data sources about exactly what the customer wants, needs and prefers at that exact moment.

This is a great ambition for any enterprise, but the practicalities make achieving it very difficult. Relatively few enterprises have the time, budget and resources to rip out existing channels and replace them with a single, omni-channel platform. While this may be the eventual goal, the reality is that most organizations are better placed to make immediate, incremental improvements via tactical integration projects.

In IVR particularly, there are several tactical and relatively easy integrations that can deliver spectacular returns in terms of customer service wins and efficiency gains. For example, we've seen companies reap big rewards with small-scale channel integrations like:

CLICK TO CALL:

Offering website browsers or app users the ability to click or tap to speak with someone. That might involve a short IVR interaction as part of the transfer, or to offer automation options if they haven't already tried on the web, but usually customers who click-to-call need to speak to an agent, so it's your job to get them there **ASAP**.

SMS CONFIRMATIONS: Sending the caller more details or an immediate confirmation by SMS of what's just been completed on the call: e.g., a booking, payment or order.

PERSONALISED URLS: Rather than having the IVR tell every caller they can also visit the website, offer the option during the interaction to receive a personalized link to a relevant page (such as a payments page or meter reading page) via email or SMS.

With a little extra integration, you can even avoid making the customer enter their login details when they get there.

While the organization mulls an investment in an omni-channel suite, it doesn't mean the IVR has to stand still. There are lots of tools out there to enable simple integrations that can make a big difference to the customer experience without costing the earth (or indeed, in the case of some open-source tools, anything at all).

A woman with dark hair, wearing a green ribbed turtleneck sweater and a large black headset, is focused on her work. She is sitting at a desk with a laptop open in front of her. The background is slightly blurred, showing a whiteboard with some text and a yellow object on the desk. The overall scene is a professional office environment.

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Principle #6

Keep It Updated

Keep your IVR from rotting with watertight processes, documentation and governance.

KEEP IT UPDATED

KEEP IT UPDATED

Even the Most Beautifully-Designed Customer Experiences Start to Rot if They Aren't Properly Maintained.

A rotten IVR is easy to spot – try it now: call up your own IVR and listen for things like:

DIFFERENT VOICES: Male, female, loud, soft, fast, slow — patchwork IVRs are hard to understand, sound unprofessional, and erode customer trust. A caller may end up with the wrong agent, causing a needless internal transfer, or they may call back to confirm a transaction because they didn't trust it went through.

CONFUSING OPTIONS: Rotten IVRs tend to have extra options tacked onto the end of menus. Look for non-sequential options in DTMF systems, e.g. “For X press 4, or for Y press 9”. In speech systems, look for options that are confusing or overlapping.

LONG PAUSES, RING-TONES, REPEATED PROMPTS: IVRs cobbled together from lots of different systems or designs do things like repeat welcome messages or legal blurb. Sometimes you'll hear long pauses or ring-tones as one system hands over to the next. In the worst cases, the system can just hang up.

These things are jarring to the caller, reflect badly on the organization and slow down interactions. Luckily, they're also all easy to avoid with the right processes, documentation and governance. Some tips on keeping your IVR fresh and professional-sounding include:

APPOINT AN IVR CZAR: Many of today's most customer-centric IVRs are managed by a dedicated 'gatekeeper'. This person is responsible for gathering requirements, prioritizing them and identifying and resolving conflicting requests. Nothing gets changed in the IVR without their knowledge.

MAINTAIN DECENT DOCUMENTATION. Too many IVRs have no documentation (or at least none that anyone can put their hands on). Keep a central spec and update it with every change, with version control so changes can be rolled back if necessary.

RECOGNIZE BIG CHANGES: For small changes, you just need to get the IVR czar's blessing, record the change in persona and update the documentation. But **BIG** changes must be recognized as such, and either tested as a prototype or **A-B** tested against the current design to ensure nothing bad happens.

GET GOOD AT REPORTING: You need to know your IVR is still working after every change. Get the right metrics and tools in place to monitor usage, pinpoint any problems (e.g., bottlenecks, drop-offs or caller confusion) and get them fixed quickly. For more on this, see [Principle #8](#).

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Principle #7

Go Low-Code Rather Than No-Code

No-code won't get you the IVR you want, but there's no need to write the whole thing from scratch, either. Look for 'low-code' tools that let you build a conversational IVR fast.



GO LOW-CODE RATHER THAN NO-CODE

Go Low-Code Rather Than No-Code

Building an IVR that Delivers A Truly Conversational Experience — While Still Meeting Business Objectives — Requires A Lot of Coding under the Hood.



Developers tend to look at two options when building a new IVR app: a 'nocode' IVR development tool with a drag-and-drop interface that hides the underlying programming complexity, or full-on hand-coding in VXML (Voice Extensible Markup Language — an open-standard markup language that most voice platforms use).

In truth, neither solution is ideal. A 'no-code' environment — essentially a standard call flow editor — will let you build around 80% of your customer centric IVR, but that's where its utility ends. If there's no option for what you want to do, you need to fall back on hand-coding to achieve what you want.

That's where things start to get messy, even for people with strong skills in your chosen programming language. The above quote — known in programming circles as Dietzler's Rule — neatly articulates the problem: with 'no-code' development environments, building the final 10% is just too difficult, so you always must compromise.

At the other end of the scale, full-on hand-coding is great if you have time and money to spend on it, and a battery of skilled programmers in-house. But as soon as something needs changing and there's no one around to code it, you're stuck. And if your one VXML guru leaves the organization, well...

HOW IT SHOULD BE DONE:

For the best of both worlds, we'd recommend a low-code, rather than no-code option. We find that low code — and that code being Java rather than clunky VXML — is the best and fastest way to build an IVR that does what customers want and meets business needs at the same time.

“

While 80% of what the user wants is fast and easy to create, and the next 10% is possible with difficulty, ultimately the last 10% is impossible. And users always want 100% of what they want.

”

Dietzler's Rule, Popularized by Software Architect and O'Reilly author Neal Ford

09

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Principle #8

Don't Skimp on Reporting

Reporting is your friend when building and maintaining a great IVR. Track high-level, task-level and state-level metrics to see what changes or improvements you need to make.



DON'T SKIMP ON REPORTING

DON'T SKIMP ON REPORTING

In [Principle #6](#) We Saw That the IVR Experience Quickly Degrades if It's not Maintained.



A great IVR is one where any problems or bottlenecks are swiftly and elegantly fixed before performance starts to suffer.

That means it needs to be able to monitor how callers use it and report on that. Ideally an IVR needs to have reliable monitoring and reporting at multiple levels:

HIGH-LEVEL METRICS: Like the total number of calls, containment (how many customers complete their task in the IVR without transferring to an agent), abandonment (how many callers hang up before they've completed a task) and the volume of transfers to different destinations.

TASK-LEVEL METRICS: Like the number of people attempting a payment, the number completing a payment and the number that don't complete for whatever reason – e.g., they didn't understand what the system was telling them, the system didn't understand what they were saying, or something unrelated to the IVR system – like their card being declined – prevented the transaction from completing.

STATE-LEVEL METRICS: That give the details of what's happening in a particular part of the dialogue – like how many people heard a particular message, how many hung up there, and how many gave a valid input that took them to the next step in the conversation.

Without the ability to monitor and report on these things, there's no way to understand where the IVR is succeeding and failing, and thus no useful information to guide practical changes.

And this is where many, many IVRs fall. While most have high-level metrics and some have state level metrics, very few have task- level metrics – and those are the important ones, because they affect the overall value of the IVR to you and your customers.

HOW IT SHOULD BE DONE:

If your IVR lacks reporting sophistication, it's time to build some in, pronto. The ideal reporting system will track all three levels of metrics and provide up-to-date and easily understandable reports (ideally dashboards) with flagging or alerting to highlight problems instantly.

And when it's time to make a change based on what the metrics tell you, a great IVR is one that lets you A/B test changes and compare the results with previous time periods. So, if it's a BIG change, you can try it out on a small percentage of calls and see how the key metrics are affected.

In an ideal world, the reports will also feed into wider channel analytics so you can understand whether your channels are working in concert or against each other. But just reporting adequately on the IVR may already be a huge improvement.

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Principle #9

Be Application-Centric and Platform-Agnostic

The app is what dictates the customer experience, so focus on getting the app right – and make sure you can move it easily to a new platform or hosting environment in future.



BE APPLICATION-CENTRIC AND PLATFORM-AGNOSTIC

The Key to Developing a Great IVR Experience Is to Focus on the IVR Application Itself.



It's the part the caller interacts with, the part that helps them do what they want to do, and the part that delivers the business outcomes you want. So, it makes sense to focus on making that interaction experience as good as it can possibly be.

This may sound self-evident, but in a lot of real-world situations, focus on the individual app is lost at the expense of focus on the underlying platform. There are many contact center platforms with built-in IVR development tools, but as we saw with [Principle #8](#), these rely heavily on linear call-flows as a design ethos. And as we saw in [Principle #2](#), the design ethos for a truly great IVR should be based on natural conversations, not mechanical call-flows.

And yet many organizations take the view that a single-platform, single-vendor strategy is better than concentrating on delivering an outstanding experience in every channel.

HOW IT SHOULD BE DONE:

We're not about to tell you to ditch your contact center platform. It was a major investment for your business, and it pays its way in all kinds of ways. But when it comes to IVR, we'd encourage you to focus on the app itself as your #1 priority. In other words, just because your platform has an IVR call-flow editor, it doesn't automatically mean you should use it.

Instead, focus on developing a great IVR app with a great user experience, and integrating it into your platform. If you're developing in an open- standards language like Java, this shouldn't be too much of a challenge (and you can always call on external help if needed...).

ONE FURTHER THOUGHT: The platform you use today may not always be with you – and the infrastructure you run it on may not be either.

As organizations move more apps into the cloud, it makes sense to develop your IVR using technologies that can easily be ported to a new platform, whether it's hosted on your premises or in the cloud. (And as we saw in [Principle #6](#), just make sure you maintain up-to-date documentation to support a smooth migration.)

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Who is Waterfield Tech?

Who is Waterfield Tech?

WATERFIELD TECH IS A COMPANY ON A MISSION: TO RID THE WORLD OF BAD IVR.



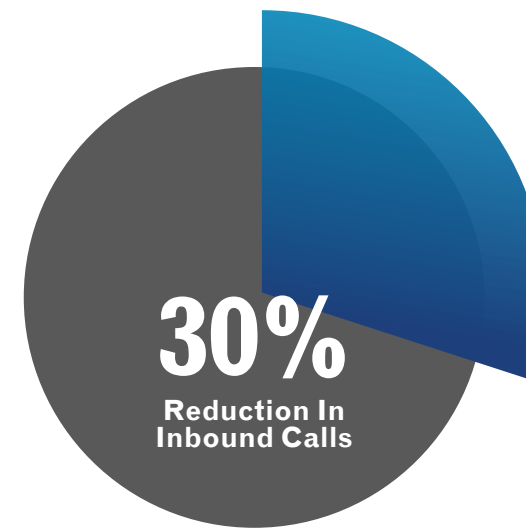
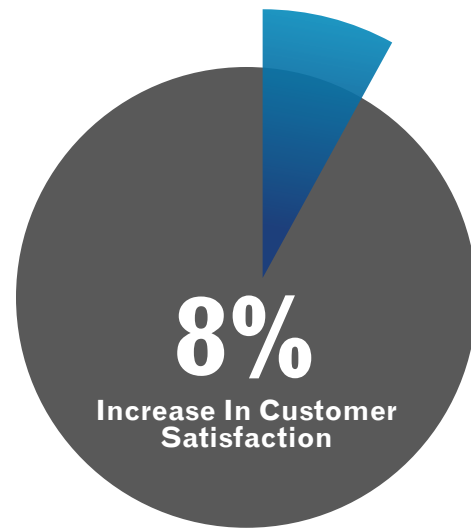
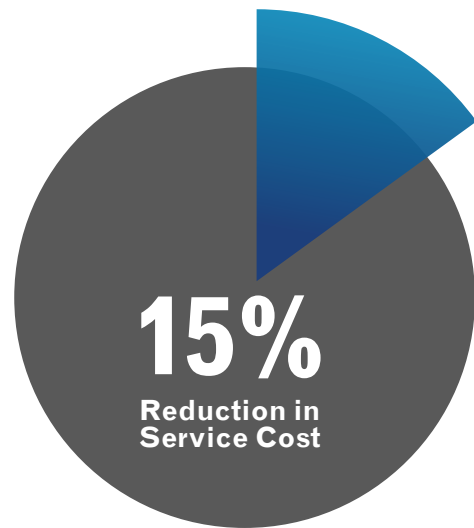
We're an experienced group of design experts and technologists who believe there's a better way of delivering automated customer experiences. And we've successfully accomplished that for a wide range of consumer brands around the world.

We help big brands see the customer experience through their customers' eyes and get their automated and self-serve channels working more effectively and more efficiently.

If you're serious about putting your customer first, while keeping costs down, we can help.

Find out more about Waterfield Tech at <https://www.waterfieldtech.com>

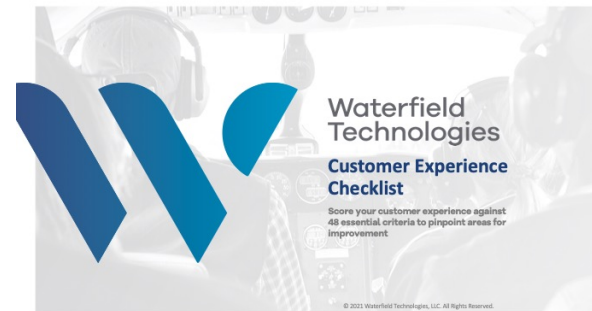
WATERFIELD TECH CLIENTS ENJOY...



WHO IS WATERFIELD TECH?

ESSENTIAL READING

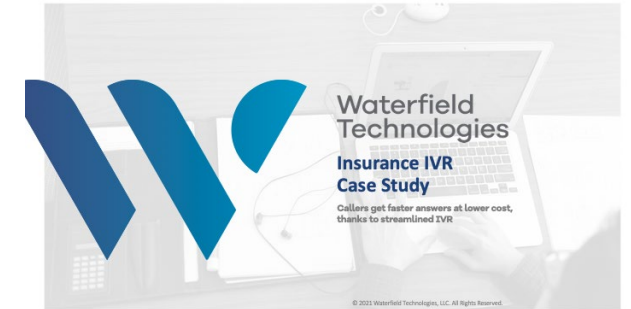
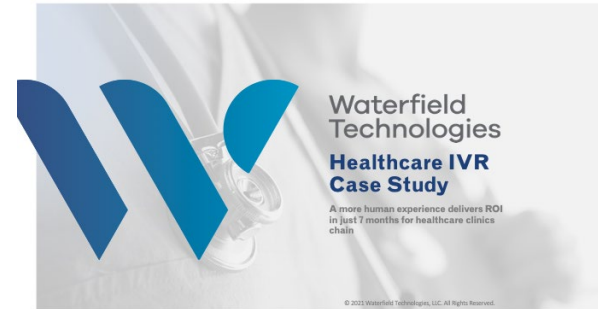
Check Out Our Practice Advice to
Deliver Smart, Connected,
Conversational IVR



WHO IS WATERFIELD TECH?

EFFECTIVE IVR IN ACTION

Learn Why These Successful Organizations Have Happier Customers



**Let's Get
Started...**

**Schedule a free expert
IVR review to pinpoint
the things you should
improve IVR Review**

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Summary and Next Steps

Building a truly customer-centric IVR is one of the most practical things you can do to boost customer happiness, generate love for your brand, manage down contact center costs and bump up revenues.



NINE PRINCIPLES FOR TRULY CUSTOMER- CENTRIC IVR

Throughout this Book We've
Been Including Key Points for
Designers and Developers to
Bear in Mind When Building an
IVR that Everyone Loves.

Here they are again in a handy, cut-out-and-keep list:

1. **Understand how your customers use the IVR – and what they need from it – before starting to design a new one.**
2. **Make sure your IVR feels and sounds conversational – and test and refine until it does.**
3. **Forget about big data (at least for now): using small amounts of data can pay big dividends when it comes to IVR personalization.**
4. **Empower contact center staff to modify the IVR – but give them the prompts, tools and training to do it properly.**
5. **Don't wait for a big investment in an omni-channel platform – use low-cost tools to make tactical, small-scale channel integrations that give an instant lift to the customer experience.**
6. **Keep your IVR from rotting with watertight processes, documentation and governance.**
7. **No-code won't get you the IVR you want, but there's no need to write the whole thing from scratch, either. Look for 'low code' tools that let you build a conversational IVR fast.**
8. **Reporting is your friend when building and maintaining a great IVR. Track high-level, task-level and state-level metrics to see what changes or improvements you need to make.**
9. **The IVR app is what dictates the customer experience, so focus on getting the app right – and make sure you can move it easily to a new platform or hosting environment in future.**



Get Started with a Free IVR Assessment

We'll put the IVR through its paces and report back to you on:

- **Your IVR “persona”:** does it accurately reflect your brand?
- **Your IVR dialog design:** does it get callers what they need, fast?
- **Your on-hold experience:** is it helpful, or excruciating?
- **Cross-channel integrations:** can callers' complete inquiries in other channels?
- **Areas that require immediate and longer-term attention**

[SCHEDULE REVIEW NOW](#)

