



# Yes, You DO Need Visual IVR

## Frequently Asked Questions

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# Migration to Digital Self-Service

Across industries and across the globe, service organizations are encouraging migration to digital self-service. The benefits are clear: lower costs versus human interactions, elimination of service wait time, a richer digital customer journey, enhanced customer satisfaction and brand equity. But now, organizations are ready to see ROI on their investments in digital customer service.

Yet despite the strenuous efforts of service centers over the past years, voice calls remain a highly popular form of customer service communication. Inbound customer care calls dominate service organizations, and customer service level expectations continue to grow. The cost of meeting these expectations with a live operator remains high, and customers continue to endure the complex, time-consuming experience of calling the call center. Many, it turns out, are still not even aware of the advantages of digital self-service.

**Need proof? Recent research found that 63% of customer service calls to banks surveyed were made for simple requests, notably checking account balance. Ironically, 70% of these service calls began with the customer looking up the phone number online. Another study found that over 40% of customers in service calls are actually in front of an active web-connected screen during the call, or have ready access to a web-enabled device.**

So, if most call center customers have ready Internet access, what's keeping them from choosing digital self-service? More importantly, what active steps can service organizations take to encourage adoption of digital self-service?

## The Art of Gently Moving Customers to Digital Self-Service

To bring users into online self-service, service organizations need to adopt the right tools. Visual IVR (VIVR) was designed from the ground up to ease customers into the habit of digital self-service. With advanced VIVR solutions like those from CallVU, customers learn that they, too, can enjoy simple, intuitive, and completely digital resolution of issues.

VIVR starts as an "on screen phone call" displaying a visual interface that extends from the traditional IVR menu into an interactive digital journey complementing every stage of the customer call. When more complex issues make person-to-person interaction unavoidable, VIVR offers agents a variety of tools to collaboratively complete complex processes such as filling out forms and signing them in real-time, uploading images, and more.

## "But Wait!" ...What We're Hearing

There are numerous and compelling reasons to implement an VIVR solution. There are also reasons – some quite valid – that service organizations choose not to implement VIVR. Below, we've collected a number of the most common questions we hear from our future clients, and our thoughts about them.

**Q. We already have IVR, why do we need Visual IVR?**

**A.** IVR plays a crucial role in the service continuum. What it does not do, however, is effectively encourage customers to choose digital self-service.

VIVR is implemented on top of your existing IVR system, and leverages the existing service scripts and backend integrations you worked so hard to develop. VIVR does not replace IVR. IVR is still required to make the initial connection for incoming phone calls, and to drive the hybrid voice-and-digital service call flow. IVR will also continue to serve customers calling landlines and for customers who are “tech-reluctant”.

What VIVR does do is simply provide a better interface and better success rates than IVR. Companies who use VIVR report higher scores in service KPIs including: higher number of transactions, higher task completion rates (TCR), fewer calls flowing to agents, fewer hang-ups in mid-process and even higher customer satisfaction rates.

**Typical success numbers reported by CallVU customers include:**

Success Factor	Traditional IVR	Visual IVR
Information processes	40%	75%
Service transactions	20%-30%	45% -70%
Sales transactions	3%-7% .	30%-40%



**Figure 1:** CallVU's Visual IVR Platform



## Q. Will customers activate the Visual IVR session?

A. Yes, experience shows that they will. CallVU VIVR is activated in two ways:

If the user has pre-installed the service provider's app (i.e. banking, insurance, etc.), the VIVR menu screen pops up automatically when a service phone call is dialed. This is made possible via an SDK embedded within the service provider's app. Thus, the user doesn't need to install any additional software on her or his device.

How does this work exactly? Once a call is made, the caller begins to interact with the traditional IVR. However, when the user lowers his or her device to press a number selection as part of the IVR process, the VIVR menu appears on the screen in addition to the number pad. Experience has shown that the overwhelming majority of users intuitively engage with the VIVR.

If the user does not have an app installed, VIVR is activated by sending the user a text (SMS) message with a link to the VIVR menu. The voice menu prompts the user to look at the screen and follow the link to the visual service. This app-free scenario ensures that all users, not just those who installed the app, will benefit from a better experience and simplified journey.

By offering the option of digital self-service - even to non-technical users - adoption rates and awareness rise in our experience.

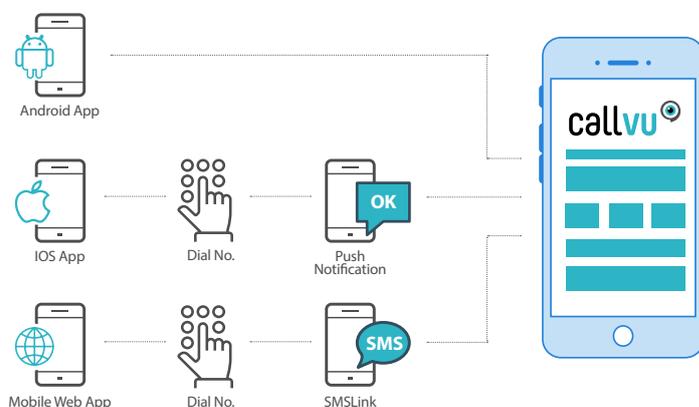


Figure 2: Activation Options, CallVU's Visual IVR



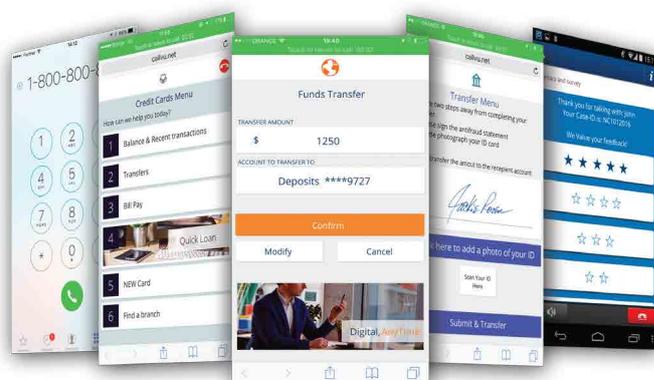
## Q. Do we need to create (or recreate) a dedicated app?

**A.** Many companies have invested heavily to put their digital strategy into action. Developing great apps and attractive websites that empower users with self-service options is expensive and time-consuming. No one wants to repeat the process with yet another channel. And no one wants to invest in ongoing management, maintenance and data updates every time a new service, pricing model or policy is being introduced.

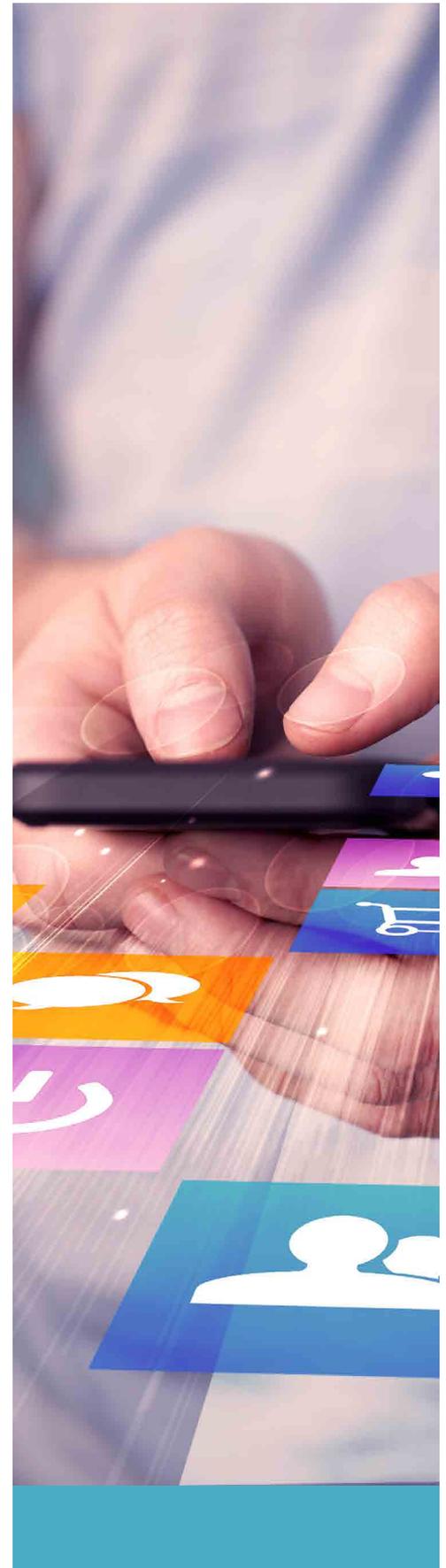
That's why, when designed and implemented correctly, VIVR is not a separate communication channel. In fact, VIVR re-uses existing data from apps and websites to make them accessible during a service phone call. Any update of existing channels is automatically reflected in the VIVR platform - saving time and ensuring cross-channel consistency.

Far from being a cost center, VIVR actually drives adoption of services in which companies have already invested – including mobile apps. Keep in mind that mobile apps – far from providing full service coverage – are in use by only some 30% of customers, on average. In retail banking, where digital adoption is highest, that number is **only 40%**. VIVR exposes the app to users via the voice call channel - driving both usage and adoption

\* Also see: CallVU block diagram on pg. 8



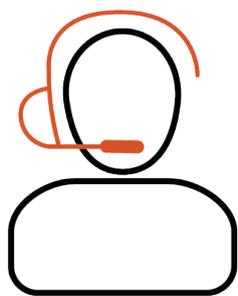
**Figure 3:** The CallVU Experience: Using existing digital assets for a visual customer journey



**Q. Don't people call the contact center because they want to speak with an agent?**

**A.** Not necessarily. Many customers call the contact center simply because that's what they're used to. Many would prefer a self-service option if they understood that it saves them time and hassle.

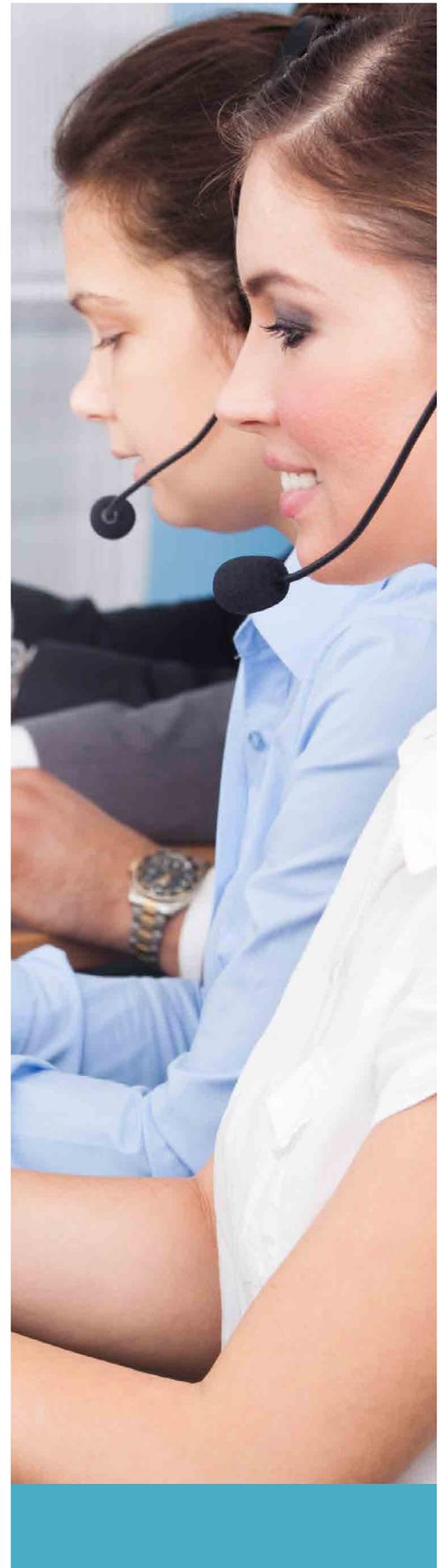
Thus, when implementing VIVR, it's important to develop a "hybrid" model to allow callers use self-service if they prefer, yet still allow them to be directed to an agent at any given point during the process. With CallVU VIVR, even when a call is transferred to an agent, the entire service call log is visible to the agent – including all processes and actions taken by the user during session, both successful and unsuccessful. This lets the agent pick up from the exact spot where the self-service left off, ensuring a seamless and coherent customer experience throughout the journey. And when the agent hangs up the call, customers can continue the self-service session on their own.



**63%**

OF customer service calls are for simple requests mainly looking for information about account balance

**Figure 4:** Why Customers Call the Contact Center (source: CallVU Customer Survey, 2017)



**Q. We provide self-service via our website, isn't it enough?**

**A.** Right, but...most customer-facing communication channels (web, email, live chat, virtual agents, support forums, service center) are siloed. What happens in one is often not reflected in the others. Thus, customers are frustrated when they have to repeat their stories multiple times.

The strength of well-designed VIVR is in its ability to repurpose digital assets. For example, the statement page shown to a customer via the visual IVR, is extracted from the website, app or even the CRM. VIVR handles a single sign-on the background – so there's no need to maintain a separate database for the service. Some of our best implementations are using heavily the existing customer web site.

Moreover, any great technology is only as effective as its usage. VIVR is designed to draw customers into digital self-service – to maximize the value and ROI of the very tools you've already invested in.

Finally, it's a fact that customers engage with service providers via multiple channels. Investing in just one channel means that many customers will not be exposed to the service.

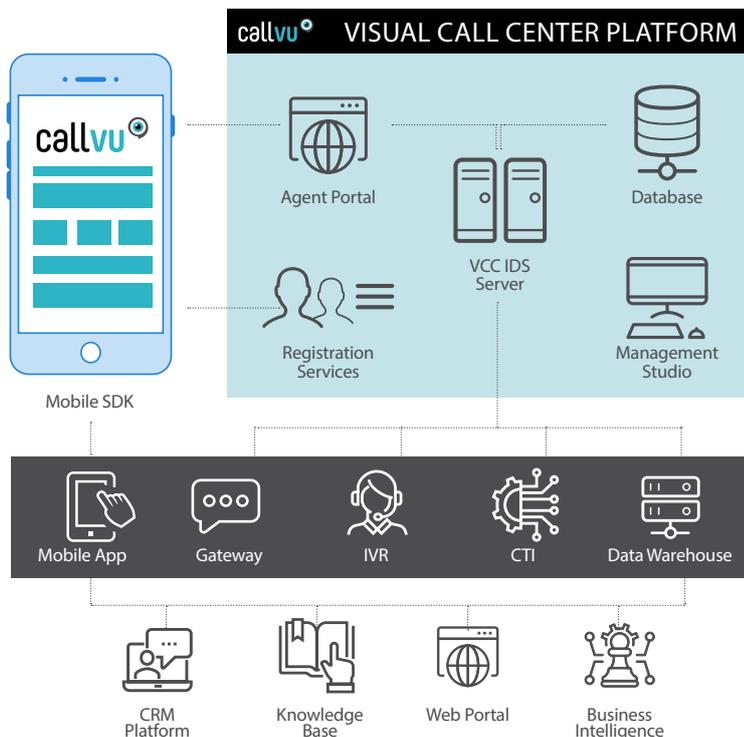
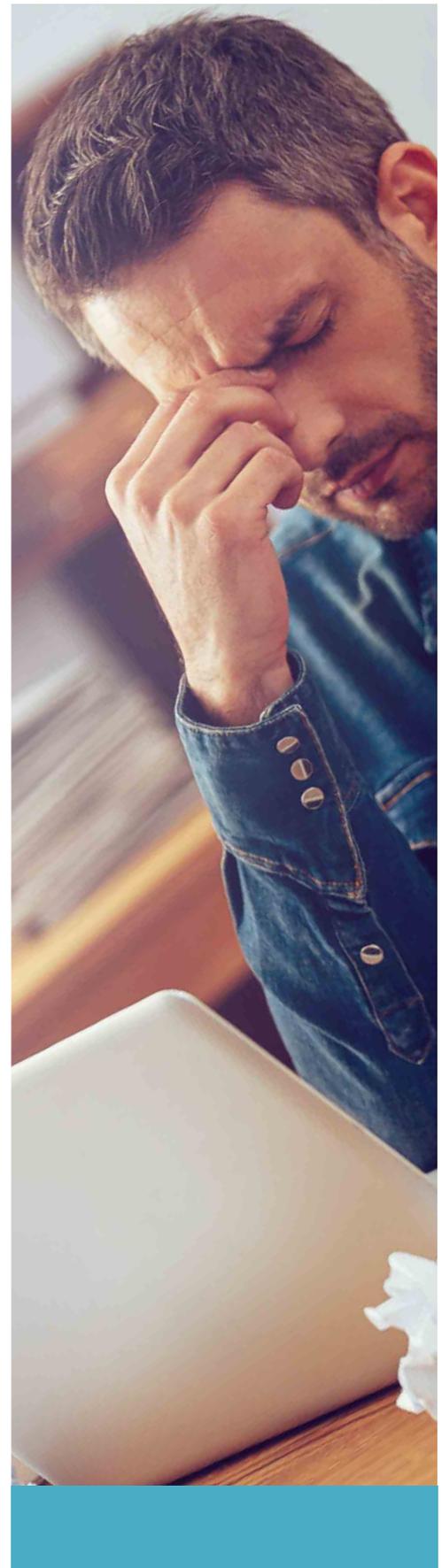


Figure 5: CallVU Platform Block Diagram

**Q.** My IVR self-service statistics are good, why do I need VIVR?

**A.** IVR offers a limited set of self-service options, and research and real-life data show that most IVR calls either end up with an agent or are dropped in mid-process. VIVR offers a much richer set of self-service options. And because VIVR is intuitive and allows the user to control the flow of the session, it shows far higher engagement levels than IVR. Hence, the amount of analytics data that the customer service team can gather is far greater than with traditional IVR.



**Figure 6:** CallVU Platform Block Diagram

**Q.** What about customer privacy and data security?

**A.** The importance of data privacy and security cannot be underestimated. That's why CallVU's VIVR platform integrates with any security solutions currently in use in your organization. Processing millions of calls a month, our platform allows users to authenticate using a wide range of tools, from simple username and password to advanced biometrics (voice, fingerprint, face recognition) and a combination of parameters (two-factor authentication).



## Q. Does the platform support digital forms?

**A.** Forms are one of the most important tools during the customer's digital journey. CallVU's platform offers a variety of methods for embedding forms as well as presenting them to callers. These include:

- Forms as part of the VIVR menu
- Pop-ups while the caller is in queue
- Post-call pop-ups
- Proactive email or SMS-text
- Agent-driven, in-session shared forms
- Website or app forms

Customers can fill out forms during self-service or co-fill them with an agent during a call. In addition, customers can also fill out forms offline and enjoy a "save & continue" option that can be accessed and completed at any time, from any device. Forms can be filled using a responsive form feature, via a wizard or in standard PDF format.

To simplify setup, CallVU offers easy-to-use form authoring and converting tools as well as backend integration for form data input and output. CallVU's management console provides in-depth analytics and reporting covering every aspect in the process, both in real time and accumulated.

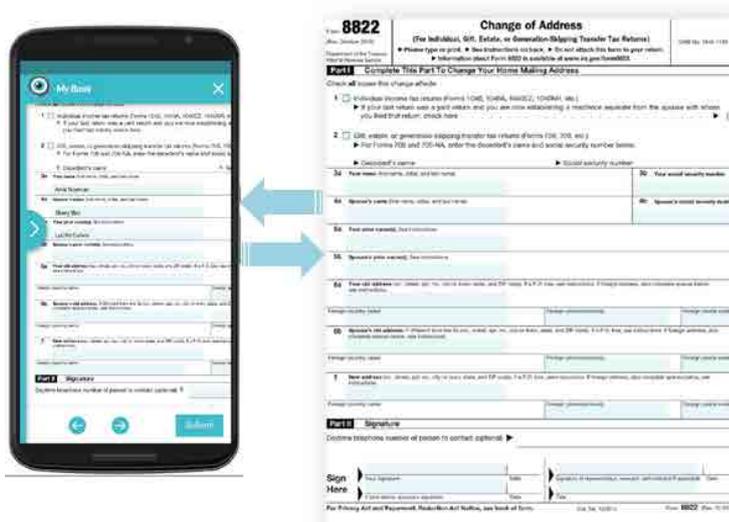
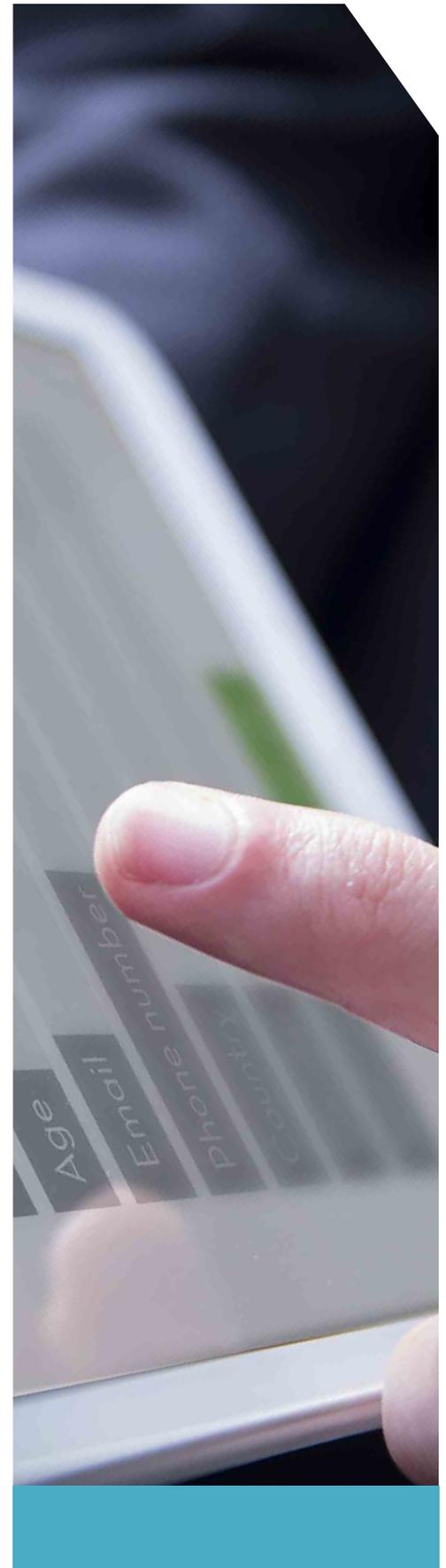


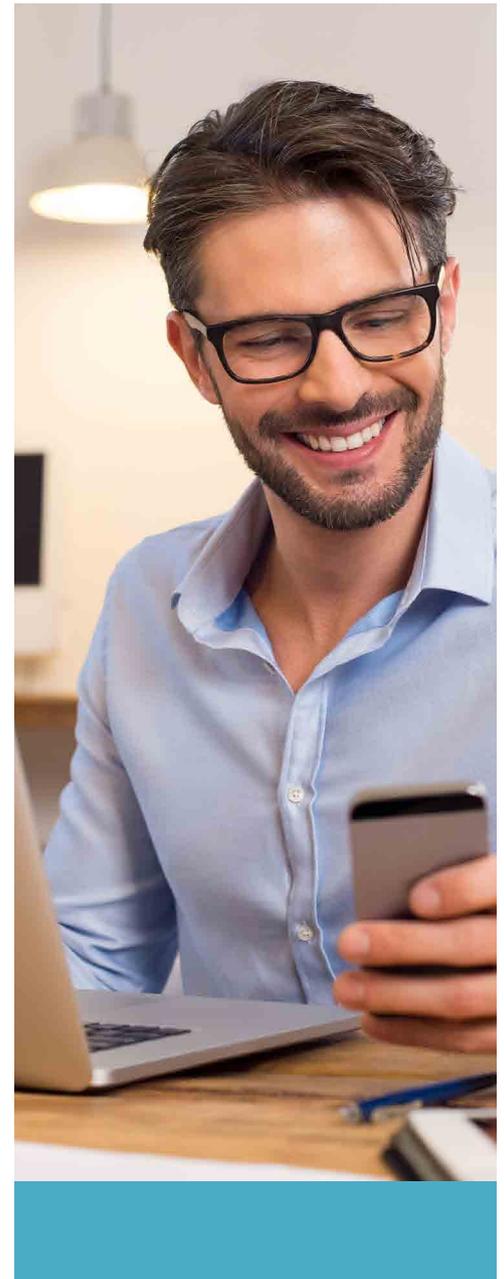
Figure 7: Sample of digital forms



**Q. How long is the implementation phase and how quickly can we expect ROI?**

**A.** Very fast. The CallVU platform is deployed on top of existing IVR and CRM systems – creating seamless convergence of voice calls and digital self-service. Digital interaction capabilities are an additional layer added to existing IVR solutions. This layer runs in sync with the voice channel and enables IVR service providers to share rich media content with customers during the call session.

This makes CallVU's platform extremely fast and easy to deploy – requiring no new development and reusing existing digital assets. A full-fledged project, from definition to launch, can take as few as 10-12 weeks. This allows teams to post quick wins and reach ROI within just a few months.



## About CallVU

CallVU offers an innovative Mobile Digital Engagement Platform blending rich digital and interactive media with the voice channel. CallVU drives simple interactions to self-service and enhance meaningful interactions to a branch like experience. CallVU addresses the business need of diverting customers to digital self-service resulting in reduced call volumes, higher utilization of existing digital assets and greater customer experience. CallVU is a Gartner Cool Vendor in Customer Service CRM 2016.

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