

We Want to Believe

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There Might Be a Problem

"I still didn't get that', 'I still didn't get that' on the @&\$! automated system"
- quote from an actual caller

Going Crazy on Phone Systems

<http://www.youtube.com/watch?v=bd-yJ4V3kZw>

Daniel vs. RoboPhone

<http://www.youtube.com/watch?v=N1H4JJcIhc>

"Thanks, robot b---h!"
- another "happy" caller

The road to reaching "phone system hell" has been long, winding, and most unfortunately, wide. While many automated technologies that replace a person have been successfully integrated into everyday life (see pool cleaners, elevator controls, ATMs, email, etc.), the general public remains resistant, some would say rightfully so, to technology encountered as part of daily life by millions: interactive voice response (IVR).

The problem for many is that it just doesn't work for them.

Anecdotes, surveys, and studies, many published, consistently indicate that people frequently feel that automated phone systems block access to true help, waste time, display poor treatment, lead them in circles, use confusing language, offer unsuitable assistance, etc., ad infinitum, ad nauseum, ad non opus.

As one can infer, the problems faced by callers are not typically related to technology or applications. Regardless of whether the interaction takes place via DTMF or spoken language, input is almost always recognized accurately and the applications function well.

It is also not simply an issue of preference. Surveys, focus groups, and usability studies, even anecdotes, repeatedly indicate that people are aware of and do like automation when it is clear to them that it meets their needs.

And occasionally one hears the argument that callers bypass automated speech systems because they are new, but that seems unlikely in a broad sense. Like automated teller machines (ATM), IVR has been around for 30 or so years. A great majority of the public is aware of them and has interacted with them. The interaction with over-the-telephone automation may not be as frequent as with ATMs, but most North Americans have some idea of what it is like to spend a little quality time with an IVR. Unlike ATMs, which faced initial resistance as well, IVR has not grown to be a pillar of modern convenience.

Automation can, though, offer benefits for callers. The systems can offer a single contact point, meaning faster and correct access, more flexible hours of service, a choice of contact channel, a reduction in wait time to achieve goals, and consistent treatment.

But, again, many times it just doesn't work for them. The benefits are just not being appreciated or realized.

Right In Front of Our...Ears

Why? Two simple words: credibility and reward.

Credibility is a key component of any successful relationship. And though machines are involved, IVR enables a relationship between human and machine and customer and company. But when the caller:

- has no faith that the system will address what they are calling about,
- feels confused or talked down to,
- perceives the underlying technology doesn't work,
- receives incorrect information,
- has to repeat their identification and other information, or
- is interrupted by advertising or useless information

credibility, which could be an effective aid, is effectively destroyed. This leads directly to the system performing below expectations for the business and its customers.

The destruction is likely unintentional but comes with a high cost. The relationship is damaged, perhaps to the point of ending it. And as can be researched elsewhere, the replacement cost for a customer can be very high. A customer may feel that the company has not been honest, caring, or thorough in offering the automated system, making the company a non-credible relationship partner. And though they cannot be sure they will find the type of partner they want, if the current relationship is damaged enough, searching the unknown might seem better than continuing to suffer the known.

Credibility is the perception callers need to have to feel like the relationship is worth continuing. Reward, though, is the sense that they are receiving something of value based on the effort expended to seek the value.

Too often, callers feel that the effort far outweighs the reward. Dealing with the IVR is too burdensome to result in the feeling of being rewarded. Having to figure out what choices mean, or the differences between them, or if there is a right way to say something, or what will happen after they talk, is unpleasant and difficult work for callers. And when they cannot know what or how many steps they have to work through, the prospect of waiting a little longer, doing nothing, for an agent seems very attractive. The sense of reward is back in proportion.

Think about this thoroughly. Customers are willing to pay a price or expend an effort. Otherwise they would not be customers at all. But they must clearly perceive that their reward outweighs the price or effort. Like water flowing downhill, customers will almost always seek a desired balance between the two.

A major part of the problem is that callers and what they are after, their goals, are not adequately assessed. The creators of the automation, the businesses and vendors, build systems with two major innate flaws. One is the rarely-spoken belief that all callers can be handled in the same way, i.e., by the same system. The second is the also rarely-spoken belief that by simply offering the automation, callers will acquiesce to the use of it, meaning they will feel that the reward is worth the effort.

But these two things are frequently not true. Many callers pick up a phone to dial primarily because they have encountered an exceptional situation and want to resolve it. And many callers resent having work thrust upon them to meet the needs that brought them to that business to begin with. They wonder, "Why am I paying someone else just so I can serve myself?" This is especially true when self-service is complicated or difficult for the caller to specify.

Some historical background might also help. IVR systems started as simple call direction or information verification applications. Little caller input was required and goals were very simple. Even then, though, the designs featured business-heavy wording and poorly recorded messages. Unfortunately, very few design improvements were made over the years even as abilities and functionality greatly expanded. New design paradigms, such as User- and Task-Centered Design, that emerged in the larger software industry were not adopted. The seed of frustration was sown, then cultivated well.

Did We Miss Our Turn?

How has it gotten to this? In a single, simple word, cost. Though customers of course generate revenue, maintaining them has a cost, customer service has a cost, creating automation has a cost. Companies constantly fight cost so that they can become more profitable. Somewhere along the line, internal resources that support customers were declared to be a cost. Therefore, the people that cause it, whether internal or external, were put on the opposite side of the battle. So, when a customer pays for cable television each month and receives the service, that falls onto the revenue side of the stream. When the same customer calls with a question or problem, other than how can I pay more money, they fall on the cost side. This is an event to be fought or reduced in the company's mind.

While the validity of that is debatable, what is clear is that it has resulted in grossly sub-optimal approaches and experiences being created to reduce costs at all costs. Which brings us to the question of how to address the mess.

How can credibility be improved and perceived reward be increased?

At the End of the Tunnel

Though each situation typically provides unique challenges, there are strong guidelines that can be followed that can be relied on to put automated solutions in the right neighborhood. Here is a good collection¹ to start with.

1. Know your customers and which ones call
2. Keep in mind that good service, self or otherwise, makes a happy customer
3. Offer complete integrated channel choice (web automation, phone automation, web chat, phone agent)
4. Follow best design practices
 - a. Design to meet the goals of both the callers and the business
 - i. Use processes such as User- and Task-Centered Design
 - b. Give accurate, consistent information
 - c. Recognize and act on customer goals quickly
 - d. Organize well.
 - e. Don't make callers repeat themselves.
 - f. Be honest and make the presentation feel honest.
 - g. Make it easy to reach a person.
 - h. Make the voice sound professional.
 - i. Use the same types of language that your callers use.
 - j. Make your IVR solution easy to use -- *and* useful.

¹ Derived from industry experts and in part from web design guidelines found at: <http://credibility.stanford.edu/guidelines/>

- k. Update your solutions content without breaking the interaction -
- but refrain from advertising changes in an obtrusive way.
 - l. Avoid or use restraint with any promotional content (e.g., ads, offers).
 - m. Avoid errors of all types, no matter how small they seem -- but make recovery easy and unnoticeable.
5. Test your solution with plenty of naïve callers.
 6. Build in significant logging and call recording capabilities.
 7. Evaluate your system often, analyze the data thoroughly and let the data drive design decisions.
 8. Seek outside validation of your solution.

Swallow Hard and Breathe Easy

Now, it is likely that collection at least seems familiar. Indeed, it contains nothing new or innovative. But it does contain much that is ignored or done poorly. So, while it cannot be said that adhering well to the guidelines guarantees success, not following them invites failure of the worst sort: losing customers and good reputation. And that is a reward no company is interested in.