



CASE STUDY

Visual IVR

Financial Services institution simplifies IVR self-service by offering web mobile engagement solutions to its customers





THE CHALLENGE

A top 10 global bank developed over 40 separate self-serve applications across a multi-decade relationship with USAN. Utilizing voice self-service best practices, USAN and the bank were able to achieve containment rates ranging from 45-89%. However, in a continuous improvement initiative, the bank wanted to boost its self-service numbers further, while at the same time increasing customer satisfaction. The challenge was solving the high opt-out rate of IVR interactions when collecting complex information like full addresses and emails, or payment information such as bank routing numbers, account numbers, amounts, and dates. The bank realized it was difficult, tedious and time consuming for customers using touch tone or speech recognition IVR, resulting in transfers to customer service representatives instead of completing a self-service interaction on their own.

THE SOLUTION

The bank recognized the importance of positioning digital channels such as USAN Visual IVR to offer an effective alternative to touch tone and voice recognition IVR.

Visual IVR is a mobile engagement solution that replicates IVR menus, prompts, flows and rules in a graphical format that is easy to use. Visual IVR detects a cell phone caller and offers them the ability to perform self-service tasks using a SMS (text) and mobile web applications. The platform sends

customers a text message with a personalized URL which allows them to open a web page and enter the required information without going through additional ID/Authentication steps. Since Visual IVR is a true multi-modal omnichannel platform, the caller can still interact with the traditional IVR while in a mobile session. The IVR platform is aware of what is happening on the mobile web site and can guide the caller through the process using voice prompts as needed.

USAN also worked with the bank to create personalized customer journeys that include the tracking of customer history across communication channels as well as identifying customer behavioral patterns. These patterns can predict when a customer might take a certain action so that the IVR can proactively reach out to the customer on their preferred channel with the information they want, before they ask for it. These capabilities drove higher containment in self-service while removing friction from the customer experience.

THE RESULTS

Over the last 3 years the bank was able to successfully offer personalized and proactive omnichannel experiences to their customer base, including the ability to solve complex self-service inquiries via mobile web applications. These efforts lifted IVR containment rates 5-12%, depending on the business unit, with a cost savings in the millions of dollars.



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About USAN

USAN helps companies profitably engage customers and deliver amazing omnichannel experiences with the industry's best cloud and hybrid customer engagement solution. From traditional telephone interactions to web-based communications including chat, email and social, USAN's portfolio of contact center applications gives businesses infinite flexibility in the way they engage customers across channels.

In addition to hosted ACD, IVR, WFM, Quality Management and Agent Desktop, USAN offers back-office integration and business process automation powered by a sophisticated omnichannel rules and workflow engine. All built upon a fifth-generation, carrier-grade infrastructure that delivers the highest availability in the industry, with proven scalability to support the largest enterprises.