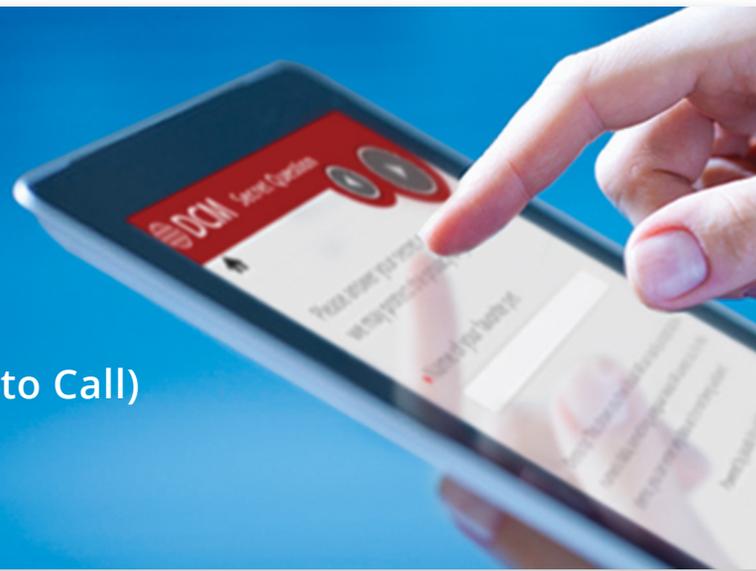


# Visual IVR vs Other Self-Service Options

(Chat, Co-Browsing, Virtual Agents, Click to Call)



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## Introduction

Companies are placing an increased focus on delivering a superior customer experience, and there is no shortage of technologies to assist them in achieving this goal. However, as the world rapidly moves to an omni channel, or connected multi channel, environment there is an inherent danger that these customer service technologies deepen the silos in which they operate, instead of offering a seamless customer experience.

This paper explores one of the new technologies called Visual IVR and compares and contrasts it to many of the other customer service technologies. In some instances, Visual IVR can be considered an alternate technology, and in other instances Visual IVR can be highly complementary to these technologies.

## What is Visual IVR?

Visual IVR aims to bridge the inherent disconnect that occurs between self service and assisted service.

*“Over 44% of customers surveyed indicated that having questions answered by a live person while doing online shopping is one of the most important features of a website”*

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Forrester

Consumers feel this pain every day, navigating a traditional voice IVR tree, only to be asked for the same information when connected to an agent. This disconnect occurs on almost all platforms - for example, engaging in an online chat session operates in a silo - when a customer is forced to abandon the chat session and call the company, there is no continuity of that interaction and the customer starts at the beginning.

Visual IVR provides a visual interface to assist the customer, either on their mobile phone or directly on your website. This visual interface can replace your existing cumbersome Voice IVR prompts, or can offer even more sophisticated self service options to further reduce your inbound calls. And for those calls that still need to be made, Visual IVR connects that self service session with the agent, ensuring the call starts warm with no repeating of information.

This paper reviews the pros and cons of the various customer service technologies, compares and contrasts them to Visual IVR and explores how they can be deployed together to mutually benefit the company and the customer.

## Chat

Chat is ubiquitous in the web landscape today - thanks to far lower price points (free at the low-end), there is rarely a customer facing website that doesn't have chat. More sophisticated Chat offerings can run into hundreds of dollars per month per agent. There can be little doubt that Chat is successful as a customer service technology. Over 44% of customers surveyed indicated that having questions answered by a live person while doing online shopping is one of the most important features of a website, and in

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particular, companies have seen a 30-50% improvement in shopping cart abandonment after implementing chat<sup>1</sup>.

The cost with Chat is not related purely to the technology, but rather with the cost of staffing a sufficient number of trained chat agents. Chat is rarely, if ever, a self service vehicle and is only an alternate conduit to speaking with an agent. These agents need to be specially trained in managing chat (typing skills, managing multiple sessions and more) and proper routing mechanisms must be in place, all increasing the total cost of ownership of a chat solution.

Where chat starts to fail is when the issue cannot be resolved within the chat session. Chat offers no continuity to a voice session when the need arises to call the organization causing significant customer frustration when the customer effectively starts the voice call from the beginning again.

Visual IVR and Chat are highly complementary. A common strategy employed is to offer customers a “help” button on your website - neither a chat button nor a phone number just a single entry point to obtaining service. Once pressed, a Visual IVR session is invoked that will understand the customers call intent, attempt to resolve the inquiry where possible, and if necessary, offer a chat session or a voice call, with full continuity during the handoff.

Visual IVR also lowers cost by reducing inbound chat volume on the front end of the customer interaction by offering self service options, or by bridging the disconnect between the chat session and a voice call on the back end of the interaction.

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<sup>1</sup> Forrester, Making Proactive Chat Work, June 4, 2010

## Click to call

*"69% of customers are expecting to hop across channels seamlessly"*

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Click to call, also known as callback, offers customers the option to receive a call from the company under the auspices of reducing waiting times for the customer. While this is partially true, it is often used to balance staffing of agents and call the customer back at a time that's convenient for the company, not necessarily for the customer. And today's 'real time on demand' customer expects to interact with your company at the moment they decide to, not later at some undetermined time.

*"Visual IVR solution services the customer at that moment the customer reaches out for assistance and attempts to first resolve the customer inquiry instead of blindly scheduling a call back."*

.....

While these solutions have tremendous ROI for the company<sup>2</sup>, they do little to significantly improve the customer experience. There is no self service component to this technology, and worse, there is no continuity of the self service session to the call back. At best, the calling agent may have your account number or call reason, but has no insight into the prior web self service session. And it's not just the disconnected experience that hurts the customer experience, it's forcing the customer through a single channel journey. In fact, shoppers are six times more likely to call your 1-800 number than to request a callback<sup>3</sup>, indicating the importance of offering your customers choice. According to Forrester, 69% of customers are expecting to hop across channels seamlessly<sup>4</sup>.

Contrast this to a Visual IVR solution that services the customer at that moment the customer reaches out for assistance, not 20 minutes or five hours later, and attempts to first resolve the customer inquiry instead of blindly scheduling a call back.

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<sup>2</sup> <http://www.oracle.com/us/corporate/analystreports/enterprise-application/forrester-tei-atg-359304.pdf>

<sup>3</sup> North American Technographics Customer Experience, Marketing And Consumer Technology Online Survey, Q3 2007

<sup>4</sup> Forrester Research, December 2014 Global eBusiness and Channel Strategy Professional Online Survey

*Customers today want a choice of channels – Visual IVR extends your callback solution to provide them this choice.*

.....

For organizations that have an existing callback solution, Visual IVR can easily front this solution by first offering self service options in the hope of reducing the need for a call, and then schedule a callback with the customer if necessary. This ensures that customers can interact in the manner preferred by them, whether that's filling out a form to receive a callback, dialing immediately, engaging in a chat or starting a self service session. Put simply, customers today want a choice of channels – Visual IVR extends your callback solution to provide them this choice.

## **Cobrowse**

Cobrowse solutions allow an agent to view the customers web browser or desktop, and to even take control to guide the customer or complete the transaction. Originally these solutions found great success in desktop support – showing a customer how to install software or troubleshoot an operating system issue.

However, cobrowse is less successful in a pure customer service environment, for a number of reasons.

First is that self service web sites have grown more and more sophisticated, with state of the art User Interfaces and improving technology reducing the need for agent assistance. As Forrester put it, if you need Cobrowse to assist a customer to complete a form, perhaps you should redesign the form!<sup>5</sup>

*“If you need Cobrowse to assist a customer to complete a form, perhaps you should redesign the form”*

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Forrester

Second, customers often perceive sharing their desktop or browser as an intrusion into their sphere of privacy, and

<sup>5</sup> Forrester, [http://blogs.forrester.com/diane\\_clarkson/11-03-03-co\\_browsing\\_a\\_technology\\_worth\\_considering](http://blogs.forrester.com/diane_clarkson/11-03-03-co_browsing_a_technology_worth_considering)

third, if you need an agent to assist you in a cobrowse situation, you may as well abandon the self service nature of the transaction and go to full assisted service instead.

Visual IVR alleviates these concerns by putting the customer in control of their self service session, ensuring that less agent assisted sessions are needed. Moreover, Visual IVR has a far greater 'reach' than cobrowse, allowing customers to resolve their inquiry via the traditional voice channel as well as the web or mobile channel.

## Virtual Agents

*“Virtual Agents often do not understand the context of the question, are poorly configured, and end up being nothing more than a hyped up knowledge base search”*

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Virtual Agents (a “chat bot”) are growing in popularity – after all, it sounds appealing from an investment perspective – you offer your customers chat without needing to staff chat agents. Unfortunately this view is not a customer centric view, and ultimately increases customer frustration.

Much like the earlier Voice IVR's that struggled with accurate voice recognition, Virtual Agents often do not understand the context of the question, are poorly configured, and end up being nothing more than a hyped up knowledge base search (putting lipstick on the proverbial pig, if you will!).

Implementation costs of Virtual Agents are higher than they first appear. Deep knowledge base integration is needed in order to have an even moderately effective virtual agent. Even more complex are multi-step interactions where the context needs to be carried over from one question to the next. Instead, the best use case for Virtual Agents seem to be collecting some information at the start of an interaction and transitioning to a live agent, either based on customer frustration (listening for words of frustration) or as a

standard practice.

Virtual Agents are forcing customers through a single journey which often ends in frustration. In contrast, Visual IVR is about offering a choice to your customers. More importantly, unlike Virtual Agents, the design principle of Visual IVR recognizes that you cannot force self service on a customer, and you need to offer a seamless bridge to assisted service for those times that self service fails.

### Comparison at a Glance

	Visual IVR	Chat	Click-To-Call/ Callback	Cobrowse	Virtual Agents
<b>Omnichannel (all touchpoints)</b>	Yes	No - Web only	Yes	No - Web Only	No - Web Only
<b>Improves Self Service</b>	Yes	No - requires agent	No - requires agent	No - requires agent	No - Web Only
<b>Bridges disconnect when transition to Voice channel</b>	YES – Agent has full visibility into self service session	No – Voice call typically starts ‘cold’	No – usually only a customer or account identifier is known by the agent	No, unless voice session remains with same	No. If the virtual agent session breaks down, the customer starts from the beginning with a live agent.
<b>Implementation cost</b>	Low	Low to High	High	Medium	High (when properly integrating to your knowledge sources)

## Summary

Visual IVR is the next generation of customer service technology, being the first solution to seamlessly blend self service with assisted service across multiple channels, offering a personalized and connected experience to your customers. Visual IVR delivers a superior customer experience, reduces inbound call volume and does so with a tremendous return on investment.

The ability for a customer to jump in and out of self service sessions and agent assisted sessions with full continuity as they complete their journey is an industry first and is changing the customer experience landscape. No other technology puts so much focus on reducing the customer effort, driving loyalty and increasing the top line.

Interestingly, Visual IVR can actually complement your existing self service technology such as Chat or Click-To-Call, allowing you to achieve a greater ROI on those investments, and improve the customer experience they deliver. Because Visual IVR can be implemented in days or weeks and has a demonstrable ROI of 3-6 months, organizations should take a serious look at implementing this technology or risk losing out to competitors.