

IVR DATA COLLECTION AND REPORTING AUDIT

A consulting service offered by:
Enterprise Integration Group
2410 San Ramon Valley Blvd., Suite 225
San Ramon, CA 94583
1-888-EIG-4IVR
<http://www.eiginc.com>

Introduction and Overview

This document is one of a series of white papers prepared by Enterprise Integration Group (EIG) to help clients understand EIG methods and processes. EIG is a leading provider of design and evaluation products that deliver superior customer self-service solutions to the enterprise.

What is an IVR Data Collection and Reporting Audit?

The overall goal of an IVR (Interactive Voice Response) Data Collection and Reporting Audit is to improve the quality of decision-making regarding the IVR and Call Center Operation. By taking advantage of this special EIG offering, decision-making is fundamentally improved as a result of: a) identifying the correct data points; b) sourcing the data from the appropriate platforms; c) mapping the data to business rules and objectives; and d) presenting the data as information in such a way that decision-making is streamlined and focused.

EIG employs various methodologies to analyze measures, metrics and reporting. Especially important to IVR operations are establishing and maintaining success metrics and other indices of measurement. These are typically manifest in IVR reports, some of which are "canned" by the vendor and some of which must be customized in order to gather more meaningful information.

What is the Value of the Reporting Audit?

IVR and other self-service applications are often funded based on their projected positive impact on user constituencies. For example, customer-service based systems are designed to automate customer service and therefore reduce costs associated with live assistance. But often, critical benchmarks are not established to measure performance. While the goal of the enterprise is to reduce costs without losing customers, that goal is undermined when IVR performance data is not understood, cannot be compared to benchmarks, or cannot be compared to similar tasks performed by call center agents.

An IVR Reporting Audit guides stakeholders through the process of correct data identification, collection and presentation so success measures can be established and acted on. In addition to the analysis of success benchmarks, an IVR Reporting Audit will also reveal efficiencies in operation, technology issues (capacity, alarms, failure recovery, etc.) and ways to leverage IVR data as a corporate asset. EIG brings years of data from research and fielded systems to this process, so you can achieve predictable and quality results at a fraction of the costs that it would incur by applying experimental guesswork.

The output of an IVR Data Collection and Reporting Audit is a printed document that guides the analysis and improvement of client reporting. The document is the physical deliverable for a consulting service performed by EIG analysts and consultants. An EIG IVR Data Collection and Reporting Audit will lower the risk and maximize the return on investment for IVR and Call Center platforms of all kinds. Information with which to base solid decision-making is the result.

Methodology

An IVR Data Collection and Reporting Audit is sometimes sold as a standalone EIG product, but more often is one phase of a more complex consulting effort. This may include a Detailed IVR Reporting Design and follow-on programming services for actual implementation. The IVR Data Collection and Reporting Audit is based on information gathered by an EIG consultant through a rigorous multi-step process. More complex projects take advantage of more than one specialist, calling on analysts, designers, and programmers to ensure that all areas of the audit are accurately and thoroughly considered and then actually implemented.

This EIG service consists of a structured and facilitated analysis session to assess IVR measures, metrics and reporting on site with key project stakeholders. This includes: 1) Mapping business objectives to reporting requirements; 2) Identifying potential gaps regarding measures, benchmarks and reporting; and 3) Identifying implementation issues (including technology assessment), challenges, and next steps. EIG will review a draft report of the audit with key stakeholders. Once consensus is reached on the findings, the audit may be followed by a Detailed IVR Reporting Design. Based on feedback from this review, EIG will finalize the Detailed IVR Reporting Design, which may be followed by programming assistance for the actual implementation of the reports specified in the design.

Step 1: Initial Evaluation

To start the IVR Data Collection and Reporting Audit, an EIG consultant first reviews the client objectives for the analysis with the client's main contact, and provides a reporting-related questionnaire which includes a report profile template. The client completes the questionnaire and provides sample reports and report profiles. The EIG consultant performs an initial analysis of the completed questionnaire, sample reports, and report profiles, to provide the results during the on-site meeting.

Step 2: On-Site Data Collection and Reporting Audit Meeting

Armed with this analysis, the consultant engages in a one- or two-day on-site meeting with the client's management, design and development team. Using a methodology proprietary to EIG, the consultant facilitates a discovery and goal-setting process. The process is a top-down approach that starts with business goals and establishes measures that will be used throughout the life of the product to ensure that the ultimate measures, metrics and reporting design will meet with those goals.

Topics Include:

- a) Assessment of current reporting sources, methods and data;
- b) Mapping business objectives to reporting requirements;
- c) Identifying potential gaps regarding measures, metrics and reporting;
- d) Identifying technology and platform dependencies; and
- e) High-level Reporting Design Discussion.

Step 3: Final Plan

The consultant returns to EIG with all talking notes and materials from the on-site meeting. After reviewing these materials, the consultant writes a final report, which is delivered to the customer for review.

EIG applies an internal peer review system to control the quality of the IVR Data Collection and Reporting Audit. It is not unusual for an EIG audit to pass across several expert eyes before the final document is released to the client. After sign-off, the audit phase is often followed by subsequent consulting services. Such services may include on-site presentation and review meetings, a Detailed IVR Reporting Design, programming and development, or total project management in which EIG sees the design all the way through to a final stable product.

Timing

An IVR Data Collection and Reporting Audit is a thorough analysis of a client's existing IVR reporting suite and recommendations on how to establish improved indices and reporting. Timing depends on the size of the project, and so a single estimate is not possible to provide in a white paper. A good rule of thumb for the range of times is from three to five weeks. The consultant typically requires several days after the client provides the completed questionnaire and sample reports to perform the initial analysis, and several days after the on-site meeting to develop a draft audit report. After completion, EIG requires some additional time for internal peer review.

Typical Calendar Time: Three to Five Weeks