From the RX pad of the

IVR Doctors

Specializing in

Automated Phone System Diagnostics & Optimization

“To ID or Not to ID?”

When or when *not* to apply it - is really the question!

We are often asked in our **IVR Workshops** when is the most appropriate time to identify a caller during the call flow. While the specific answer certainly may be related to your industry, the general answer is: Capture the information at the call’s outset, via ANI (automatic number identification), but only *apply* it to route the call properly at the last possible moment, if at all.

Why?

- **Account or caller identification is fraught with failure and can lead to unclassified calls being placed in general holding queue.**

  Too early account/caller identification may result in an unclassified call, that is, without the caller having pressed and/or said a few responses to categorize their call. If account/caller ID is applied too early, you don’t yet know the path of the call tree that caller would have gone down and where to send the call. (It’s not enough to say to yourself, *“We’ll get them to classify after account/caller ID failure.”* It’s generally too late by then, so the call may not be prioritized properly or sent down the most appropriate gate. This may result in a representative having to classify the call type and, in the worst case then, transfer the call,if you have skills based routing and the first rep is not qualified to handle that type call.

- **It may send the message that your IVR system is not very smart.**

  Of course, this is totally untrue, but every failure may be perceived by a caller as an example that your system doesn’t work for them, or isn’t very ‘smart.’ (This can subvert future use.)

- **if ID fails you lose the opportunity to route appropriately, to the proper skills set!**

  Imagine the difference (with account/caller ID):

  “Mr. Smith, I see you’re calling about a billing or payment matter today. How may I help you?” (Or, drop the salutation if additional identifying questions need to be asked - **or, if account/caller identification failed** - but at least show the caller that the system did its work, delivering the call where it needed to go. This makes the account/caller ID “failure” a bit more palatable and opaque to the caller.)

  As opposed to:

  “How can I help you?” or ***“May I have your phone number-account number (etc.)?”*** These questions make it sound like the time the caller spent in the IVR was a complete waste of their time, and may further anger the caller,if they are then transferred to another representative.

- **And who says that every call *has* to be identified? ID’ing can reduce self-service!**

  While the logical, seemingly obvious tendency, is to ID every call, ask yourself whether all call types actually require identification. For example, calls for payment locations, company addresses (e.g., mailing address, walk in offices, pharmacy or bank locations, drive-thru locations), and general information requests may not require account/caller ID, so subjecting those calls to it may reduce or hinder self-service call containment, and needlessly being transferred to a representative.

Join us in Orlando at the
Contact Center Association’s Spring Conference

April 24-26, 2012

Click **here** for details.

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