

An IVR Doctors' Webinar

"Delivering Exceptional Cross-Channel Customer Experiences"

In association with



Usability Concepts, LLC
Making it easy for customers to do business with you.

February 26, 2020





...in collaboration with a new IVR Doctors' partner...



Usability Concepts, LLC

Making it easy for customers to do business with you.

Chris Bond
Founder & President

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What's ahead for today?

- **Webinar Administration Notes**
- **IVRs and call center technology**
- **Designing Exceptional Digital Experiences**
Chris Bond - Usability Concepts, LLC
- **Wrap up and Q&A**





Today, IVR meets IVA and the game is afoot to figure out channel synergies that work for all customers, regardless of their choice of channel!

It's not confusing:
Customers just want their transaction to be quick and resolved to their satisfaction.





*“You just want a quick, straight answer...
It’s a busy life, this world now, a lot busier
than my parents said it was for them.”*





So the challenge is going from simply talking about Omnichannel to providing real Digital Platform Consistency





- There's a lot of 'buzz' about Siri, Alexa, and AI, but...
- Speech can be expensive...and it still has foibles...
- And there's no implementation rush, however...
- Elements of speech in IVRs, when properly understood, tested (with unbiased Usability Testing) and implemented well, are here to stay!
- Today, there are two leading IVR/speech design strategies:
 - ◊ Dual modality (e.g., 'press or say') - emerging as the safest, and best-in-class IVR menu design.
 - ◊ Technology-assisted or full natural language. Full natural language can work in some industries and with certain customer groups, but may not be 'ready for prime time' for all. However, a hybrid design captures the best of both modalities.





A natural language & hybrid dual modality (speech & touchtone) design serves all callers.

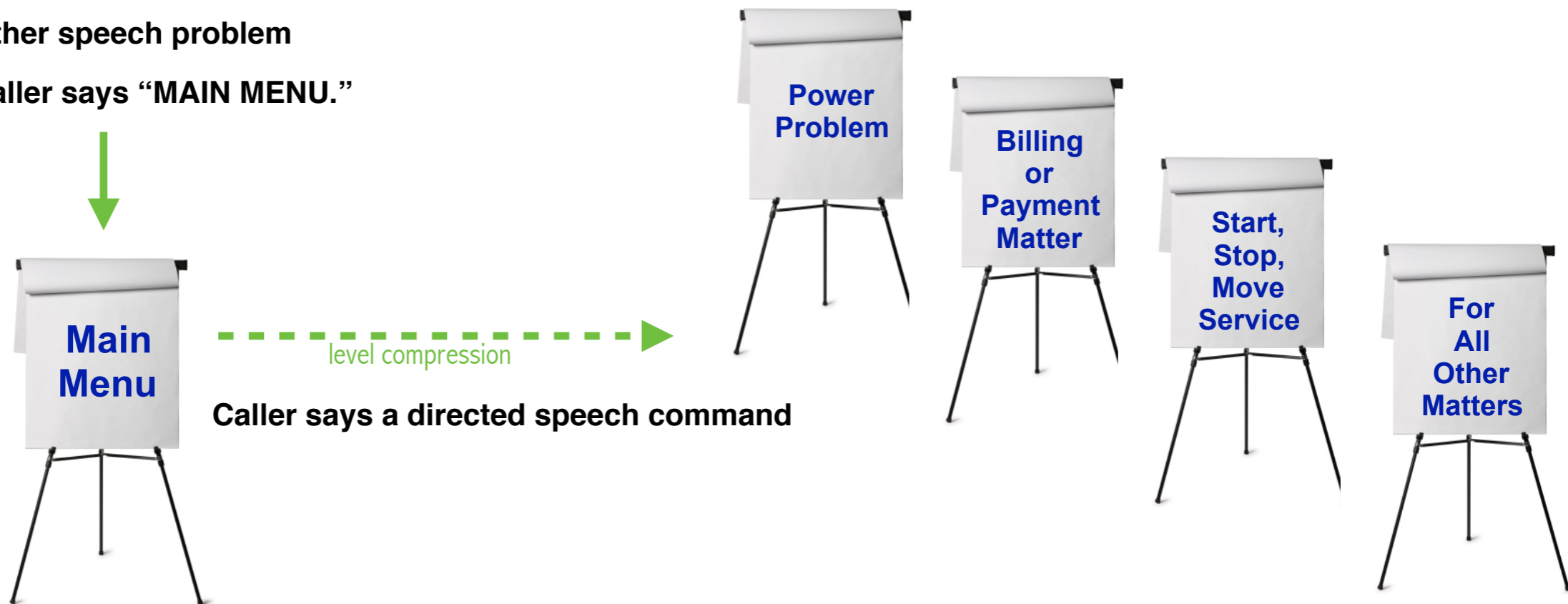
“In a few words, tell us the reason for your call.”

level compression

To the appropriate application

or to high-performing press or say menus, if...

- Response is not coded
- Unintelligible response
- No response
- Other speech problem
- Caller says “MAIN MENU.”





A look across the utility speech landscape (As of 10/15/19)

Natural Language



Emerging customer modality preferences (i.e., dual modality).

Press or Say (numbers)



Press (numbers) or Say (words)



Contextual Speech



Say (words) or Press (numbers)



Non-Contextual Speech



With touchtone either latent and/or a default among **all** speech systems, **dual modality is actually present in speech IVRs**, whether overtly offered or not.





Summary: Some of the Pros and Cons of each speech format

Pros

Cons

Natural language

- Seems to callers like a natural conversation.
- Speech recognition software is improving rapidly.
- No menus to listen to or choose from.

- Doesn't always work seamlessly.
- Highest risk, with everything riding on one technology.
- Maintaining speech can be expensive & time consuming.
- May negatively impact self-service & caller satisfaction, if it doesn't work well.

Say only

- Directed dialog not as open-ended
- Reduces the number of options
- Speech allows for more options (e.g., BALANCE)

Speech comes in many flavors, and each has its pros and cons...which much be carefully considered - well in advance of approaching speech vendors.

- Seamless & requires tone only (TT) or TT & speech?
- Expensive & time consuming.
- May negatively impact self-service & caller satisfaction, if it

Say *or* Press

Just #s

or

Words

Numbers

- Uses both modalities easier or more expedient
- A numbers-only approach easier to manage
- Say words coming after "press # or say..."
- No need for a default decision or system to manage.
- May improve account ID success.

- Press commands exposes & does not leverage the RG customers' familiarity
- Opportunities with a

Press *or* Say

Numbers

Just #s

or

& Words

- Uses both modalities and lets callers choose what is easier or more expedient for them for each response.
- Numbers-only approach limits speech library, but is easier to manage and more likely successful.
- Having press commands first in each option plays to the "touchtone bias" (which peers have reported).
- Using directed speech command words may maximize ("e.g., PAY NOW) level compression.
- No need for a default decision or system to manage.
- May improve account ID success.

- No level compression with numbers-only approach.
- Say words coming after "press # or say..." potentially underutilizes level compression.





Speech comes in many flavors, and each has its pros and cons...

...all of which much be carefully considered - well in advance of approaching speech vendors.

Directed dialogue, with no context (w/DTMF latent):

"You can say OUTAGE, BILLING, PAYMENT, MOVING, or OTHER."

Directed dialogue, with context (w/DTMF latent):

"To report an outage or to get an outage update, say OUTAGE."

Directed dialogue, with our without context, with dual modality:

"You can say OUTAGE, or press 1." or

"To report an outage or to get an outage update, press 1, or say OUTAGE."

or (say, and then press) "...say OUTAGE, or press 1" - which leads with a potentially more problematic speech element; namely, it also requires a different cadence and pausing strategy for each option.

Directed dialogue, with our without context, with dual modality:

"For billing and payment matters, press or say TWO." (Which may be easier and less expensive to manage, but does not provide for the principal benefit of speech, namely, level-compression.)

Natural Language (NL)/Open-ended speech:

"How can we help you?" (Which can either drop right to the application, if NL works, or to a high-performing menu-based, dual modality structure, keeping the benefits of speech, while also allowing callers the familiarity of touchtone if they so prefer, or if the caller is in an ambient noise situation that may defeat speech.)



Cost-reducing AI-assisted elements may apply for selected applications throughout.





When it's all said and done with any shiny new technology object, don't forget...





Designing an exceptional customer experience in the IVR world or in other digital channels rely on many of the same key principles, as we'll see next when Chris Bond explores...

Designing Exceptional Digital Experiences



Designing Exceptional Digital Experiences



Usability Concepts, LLC
Making it easy for customers to do business with you.

What is the Customer Experience?

The sum of all interactions between an organization and a customer over the duration of their relationship.

What is a channel?

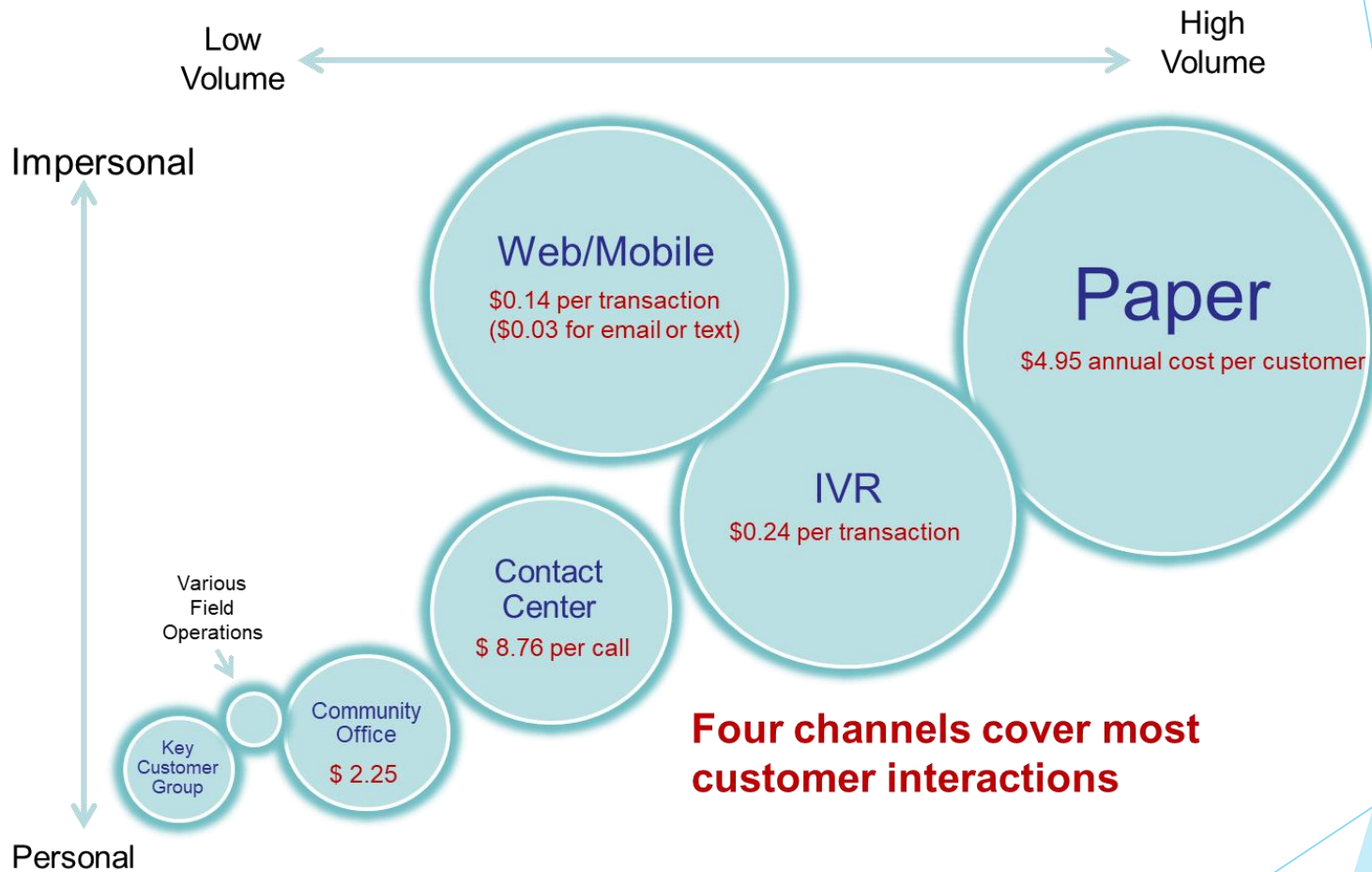
A channel is any method that a customer uses to communicate with you or conduct business with you.

Examples of channels

- In Person
- Phone (CSR)
- Digital Channels
 - ✓ Web
 - ✓ Mobile
 - ✓ IVR
 - ✓ Virtual Assistant
 - ✓ Texting
 - ✓ Social Media
 - ✓ IoT
- Email
- Paper Bill
- Direct Mail (promotions, forms, etc.)
- Community Events

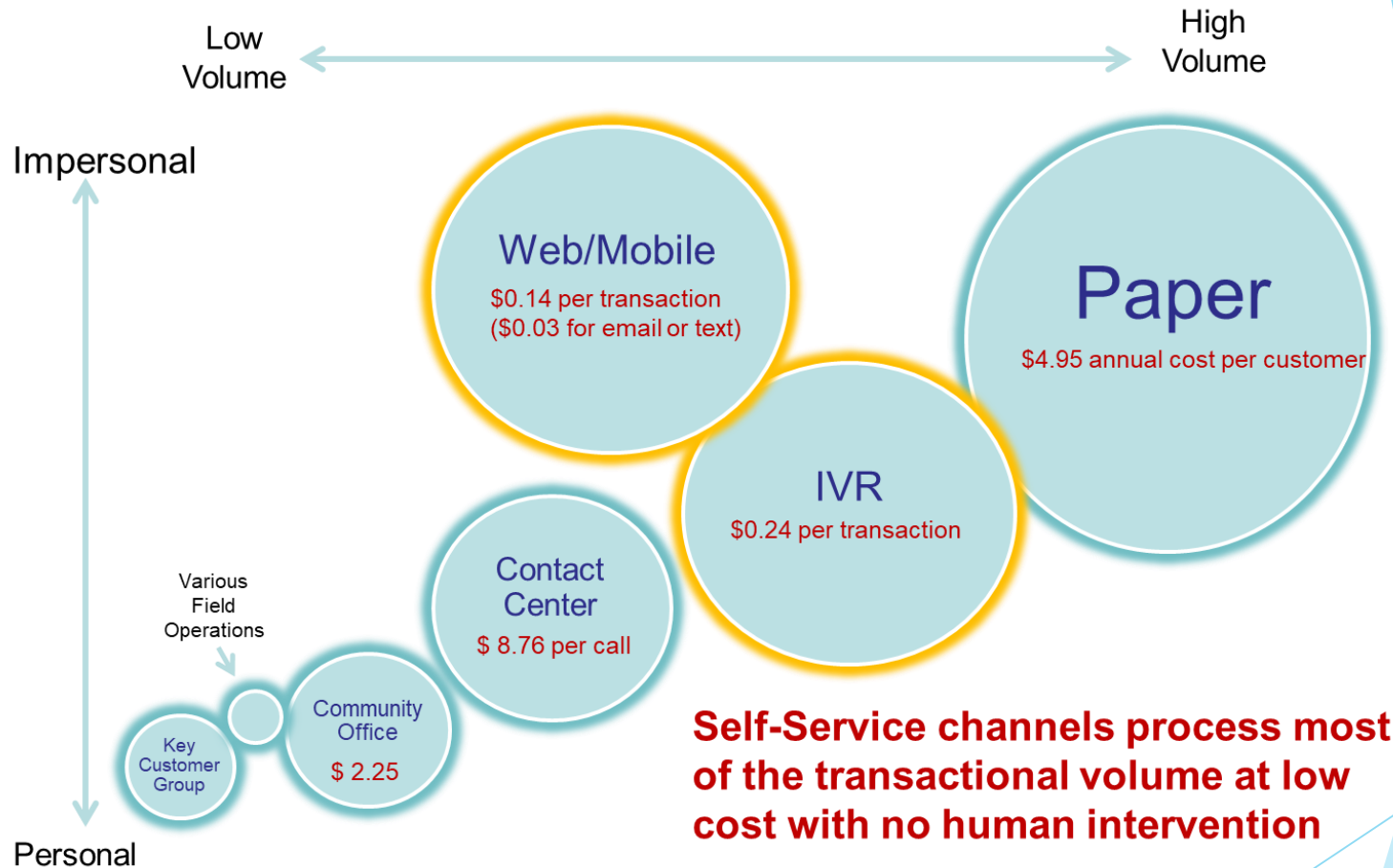


Channel Structure



Four channels cover most customer interactions

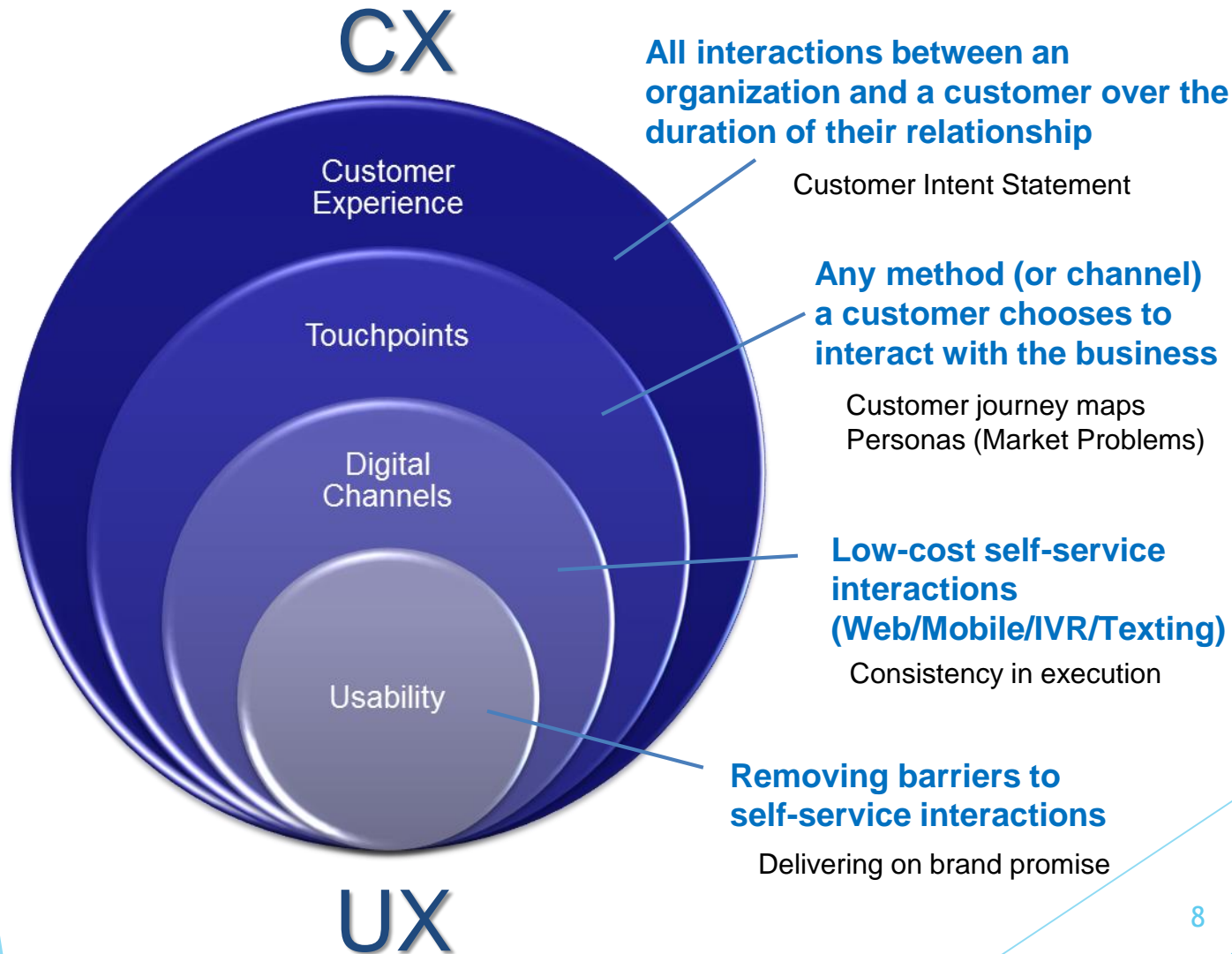
Channel Structure



What is the User Experience?

*All interactions between an organization and a customer within a **digital** channel.*

How UX and CX are related

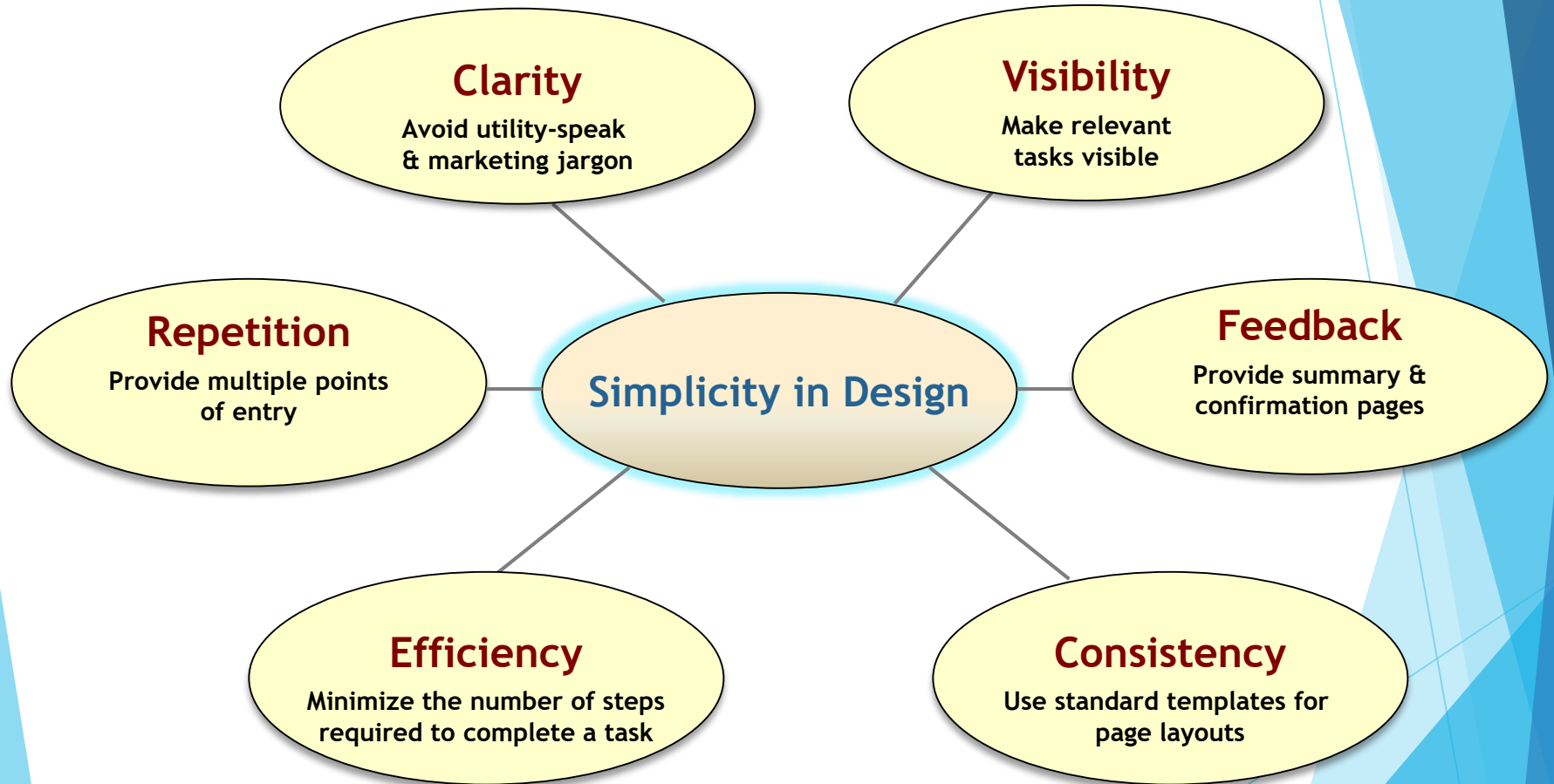


What is a good User Experience?

A good user experience is one that requires the least amount of effort to complete a task in the least amount of time with the fewest number of problems or errors.

Optimal Usability = minimal physical and cognitive effort to get something done.

Key Principles of Design



What is the value of providing a good User Experience?

Good user experiences are a lot less costly than bad user experiences.

Frictionless experiences create digital loyalty.

Why is this important?

Cost savings of paperless bill	\$5.28
Web/mobile self-service transactions	\$0.14
IVR self-service	\$0.29
CSR	\$8.60
Community Office	\$8.60

- Design effortless, low cost digital self-service experiences
- Encourage consistent engagement with notifications/alerts
- Deliver personalized billing & payment experiences for each customer segment
- Increase IVR, web and mobile containment

Components of UX

The user's mental model

Intention

Goal: Pay My Bill
Intent: Pay My Bill Online

Action

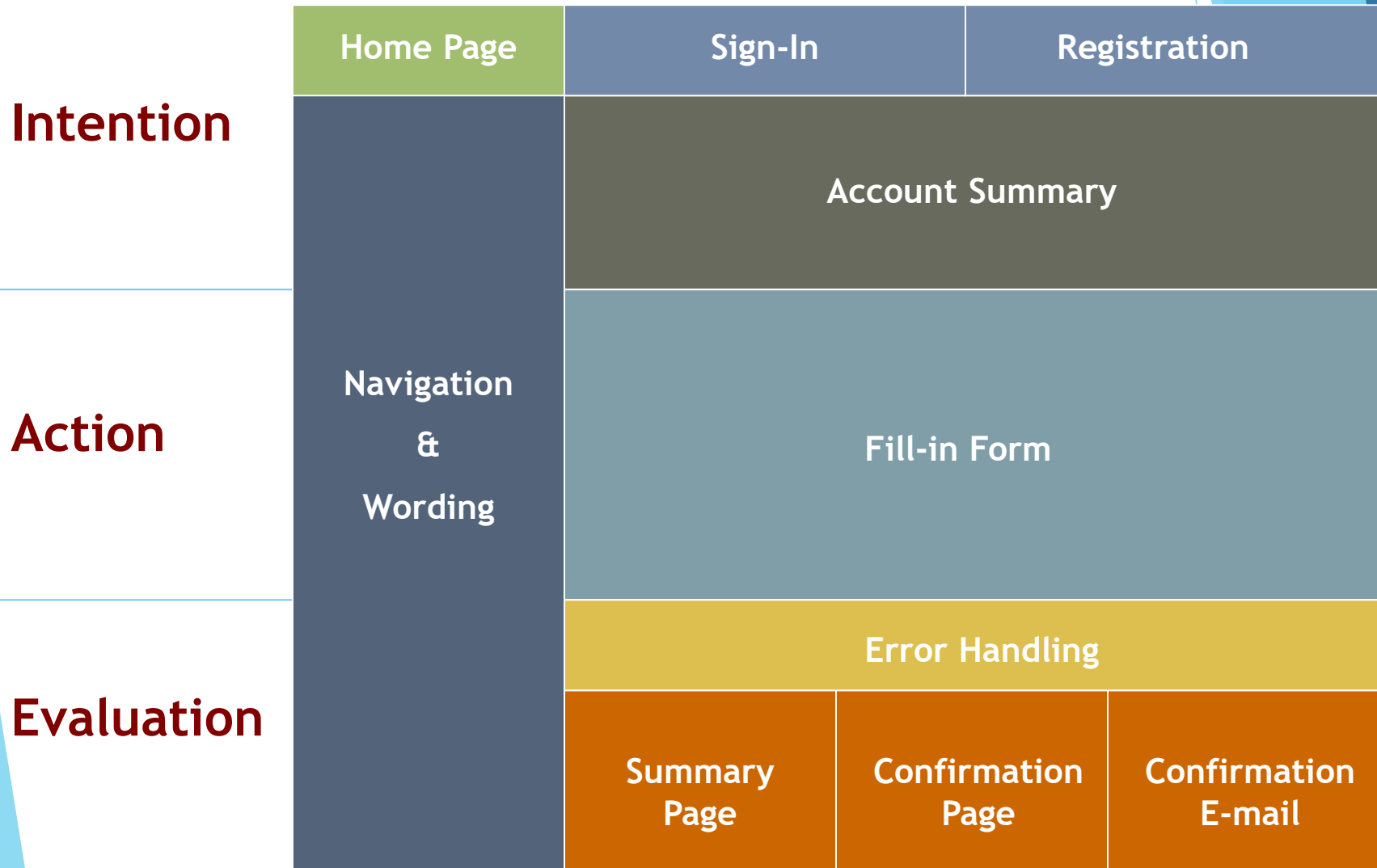
Steps: Sign-in or Register
Select Payment Method
Verify Amount Due & Date
Authorize Payment

Evaluation

Interpret: Detect and Correct Errors
Summarize: Verify and Submit Payment
Confirm: Receive Online Confirmation
Receive E-mail Confirmation

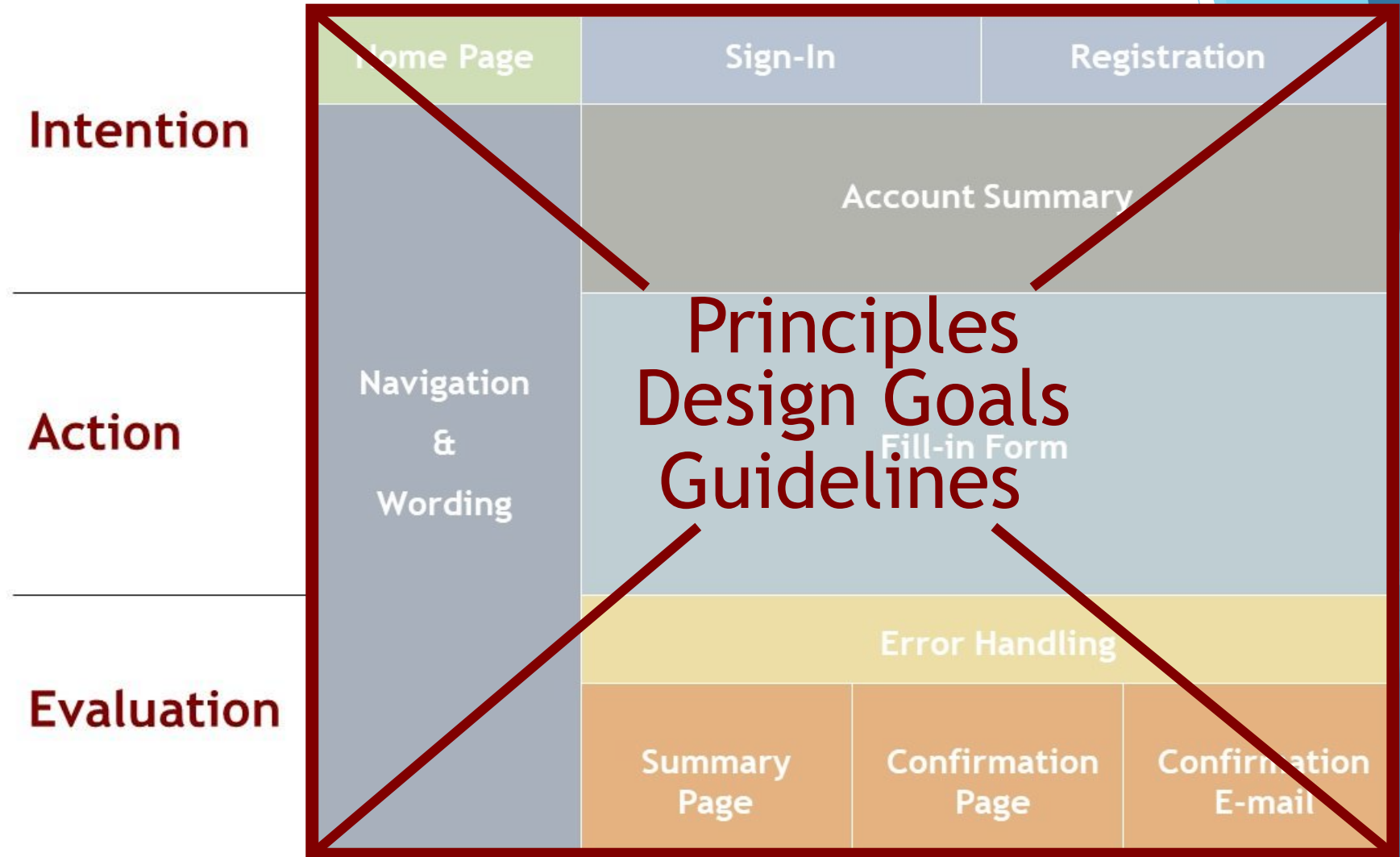
Components of UX

The designer's mental model



Components of Usability

Bridging the Gap



Objectives of the Self-Service Conceptual Model

- Provides a basis for understanding the needs and preferences of digital users
- Establishes a common vocabulary for articulating the online experience
- Promotes consistency in omni-channel experiences
- Furnishes guidelines and standards for developing self-service functionality
- Fosters teamwork for more cohesive, cross-departmental self-service development
- Makes the development process more predictable by providing examples of well-crafted interactions
- Allows for informed decision-making based on knowledge of the techniques for optimizing digital self-service
- Improves speed of throughput, adoption rates and customer satisfaction
- Decreases level of effort and task abandonment rates
- Prevents web/mobile support phone calls

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Common Problems

The most common touchpoints of friction:

- Registration
- Sign in
- Forgot password
- Pay bill
- Outage reporting
- Start/Move Service

Common Problems

The most common touchpoints of friction:

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 - Sign in
 - Forgot password
- Pay bill
 - Outage reporting
 - Start/Move Service





1 in 4 people forget at least
one password every day.

Common Complaints

The most common causes for low favorability ratings include:

- Slow page loads
- Site down for maintenance
- Can't sign in
- Forgot password process doesn't work
- Convenience fee for one-time payments
- Outage reporting requires authentication
- Start/Move Service ineligibility
- No mobile app or mobile app lacks full functionality of the website

Forcing task/channel abandonment and an expensive, often angry phone call.

Problems with Registration

Online Registration

Sign up to access your PGE account online. For assistance, call [800-542-8818](tel:800-542-8818).

Customer Information

First Name

Middle Name

Last Name

Date of Birth

Create Sign-in

▲ This account is already registered for online access. [Sign In to view your account information.](#)

Email Address

Password

[SHOW](#)

By registering for online access, you agree to PGE's [privacy policy](#).

Problems with Registration

A site that shames dumb password rules . . . the list is long.

<https://github.com/dumb-password-rules/dumb-password-rules>

Dumb Password Rules

Shaming sites with dumb password rules.

Contributing

Feel free to submit a pull request with dumb rules you've encountered.

See other sites for the formatting and follow these rules:

- Include the name of the site with a link.
- Add a clean comment about the dumb password rule (optional).
- Include at least one screenshot.
- Keep the sites in alphabetical order.

Sites

Table of contents

- [Admiral](#)
- [ADP](#)
- [Advanzia](#)
- [American Express](#)
- [AmeriHealth](#)
- [AOL](#)
- [Apple](#)
- [Arbeitnehmeronline](#)
- [Arlo](#)
- [AT&T](#)
- [Banco Mercantil](#)
- [Battle.net](#)
- [Best Buy](#)
- [Blackrock](#)
- [Blue Cross Blue Shield Massachusetts](#)
- [BMO Bank of Montreal](#)
- [BMW ConnectedDrive](#)

ADP

Forced to change the password during the first login. At least they could use proper grammar in their rule list.

The screenshot shows a 'Change Password' form with three input fields: 'Current password', 'New password', and 'Confirm new password'. A 'NEXT STEP' button is at the bottom. A list of password rules is overlaid on the right side of the form.

- Between 8 and 20 characters
- Minimum of 1 uppercase and 1 lowercase
- Minimum of 1 digit or special character (- !@#\$)
- At most 3 repeating characters
- Maximum of 3 subsequent characters
- Different from last 4 passwords used
- No given name, surname or login name

Registration

First, look at your data . . .

Person Type	Total Persons	Has Email	Has Birthday	Has SSN	Has DL	Has Phone	Has at least Phone & DL or SSN	Has at least DL or SSN	Percent with Email	Percent with Birthday	Percent with SSN	Percent with DL	Percent with Phone	Percent with at least Phone & (Either DL or SSN)	Percent with at least DL or SSN	Has PNP	Accts with PNP on multi-accts
Authorized User	38,228	8,788	36,371	8,018	7,221	25,303	8,841	9,566	22.99%	95.14%	20.97%	18.89%	66.19%	23.13%	25.02%	23,447	75,325
Co-Applicant	191,480	34,957	144,660	150,508	92,932	119,861	111,296	166,959	18.26%	75.55%	78.60%	48.53%	62.60%	58.12%	87.19%	69,663	75,325
Main Customer	739,605	542,284	655,616	637,866	552,188	727,852	676,835	684,915	73.32%	88.64%	86.24%	74.66%	98.41%	91.51%	92.61%	719,004	75,325



How do your CSRs identify or verify callers?

Registration

Guidelines

100%

95.14%

75.55%

Online Registration

Sign up to access your PGE account online. For assistance, call 800-542-8818.

Have a business? Learn how to [work with multiple accounts](#) and [register online](#).

Identify the PGE account:

Phone Number (for the service location)

Account Number [Sample Bill](#)

Enter one of the following:

Last 4-digits of SSN or Tax ID

Last 4-characters of Drivers License or State ID

Date of Birth

Create Sign-in

Email Address

Password

 [SHOW](#)

Enter a 4-digit PIN code in case you forget your password.

PIN Code (Optional)

Paperless Billing

Enroll in Paperless Bill

Send me a paper bill

By registering for online access, you agree to PGE's [privacy policy](#).

Default to most commonly stored data for highest match rate

Optional PIN Code

Default to Paperless Bill

Registration

Guidelines

- Skip the Captchas
- Skip the Secret Questions
- Use known information (Last 4-digits of SSN or Drivers License, Birthdates)
- Encourage PIN creation
- Stay in band (don't require verification code)

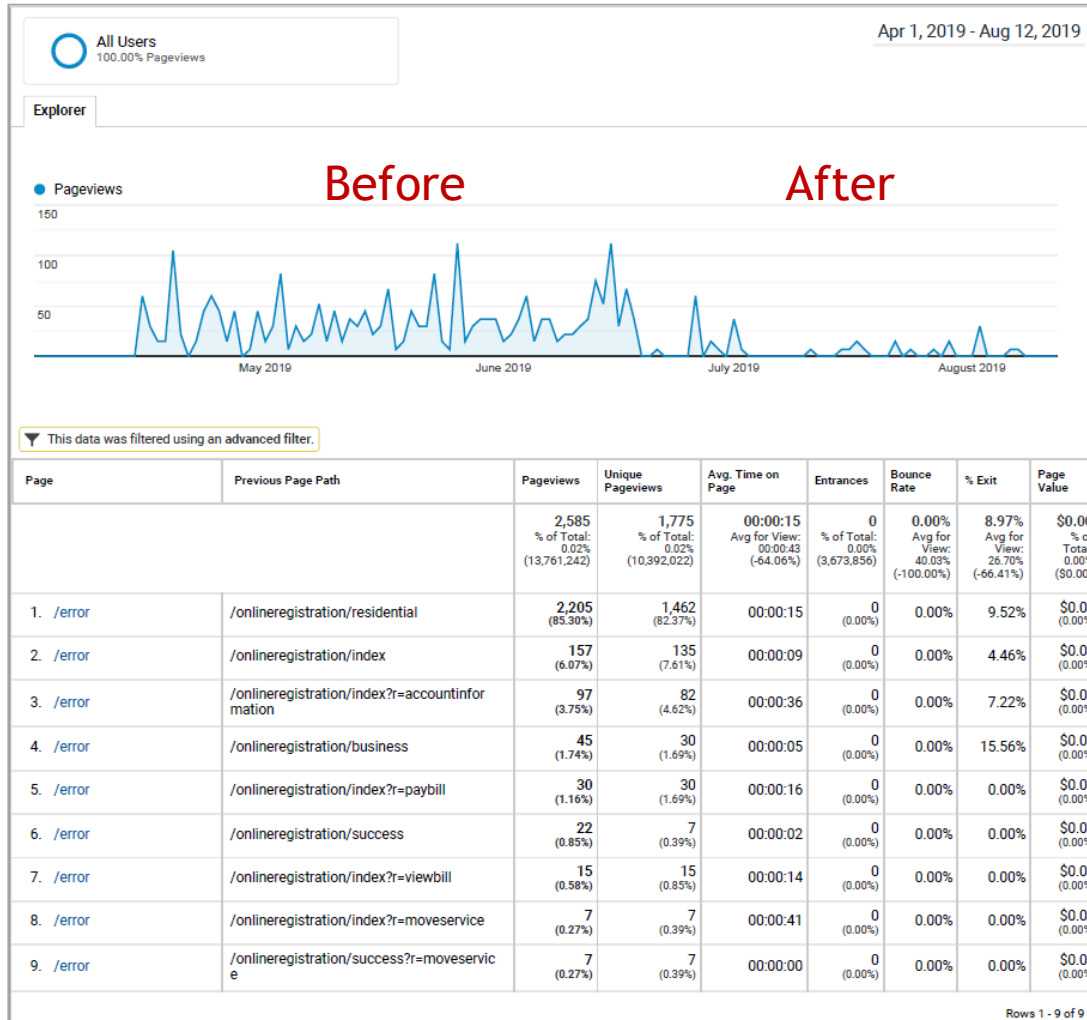


It's your first opportunity to make a good impression.

Remove the friction, make it easy.

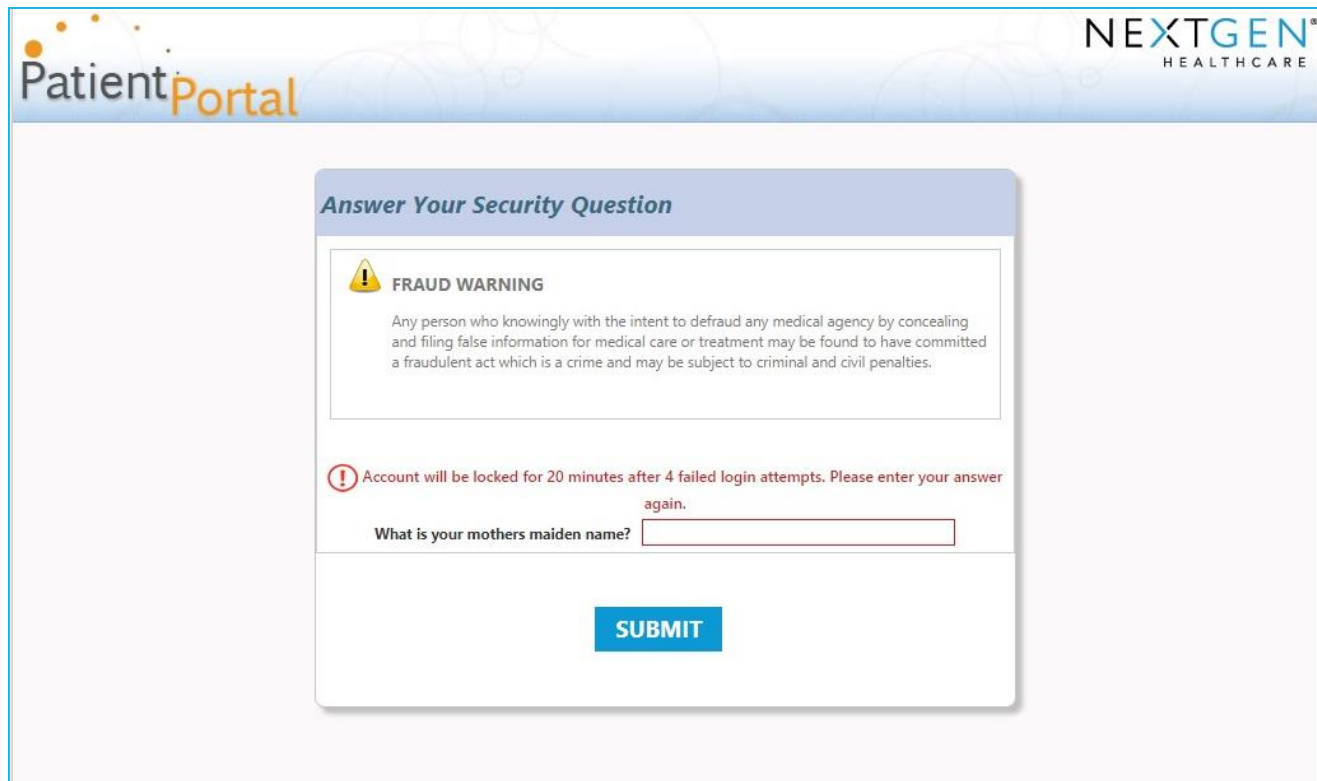
Registration

Again, look at your data . . .



Forgot Password

Most people forget at least one password every day. Graceful recovery is the difference between a \$0.14 online transaction vs. a \$9.00 phone call.



The screenshot shows a web interface for a Patient Portal. At the top left is the logo "PatientPortal" and at the top right is "NEXTGEN HEALTHCARE". The main content area is titled "Answer Your Security Question". Below this title is a "FRAUD WARNING" section with a yellow warning icon and text: "Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties." Below the warning is a red warning icon and text: "Account will be locked for 20 minutes after 4 failed login attempts. Please enter your answer again." Underneath is a text input field with the label "What is your mothers maiden name?". At the bottom of the form is a blue "SUBMIT" button.

Forgot Password

Most people forget at least one password every day. Graceful recovery is the difference between a \$0.14 online transaction vs. a \$9.00 phone call.

Forgot Password

Keep users within band.

Provide the following information to access your online account.

Email Address

Phone Number (for the service location)

Enter one of the following:

Last 4-digits of SSN

Last 4-characters of Driver's License or State ID

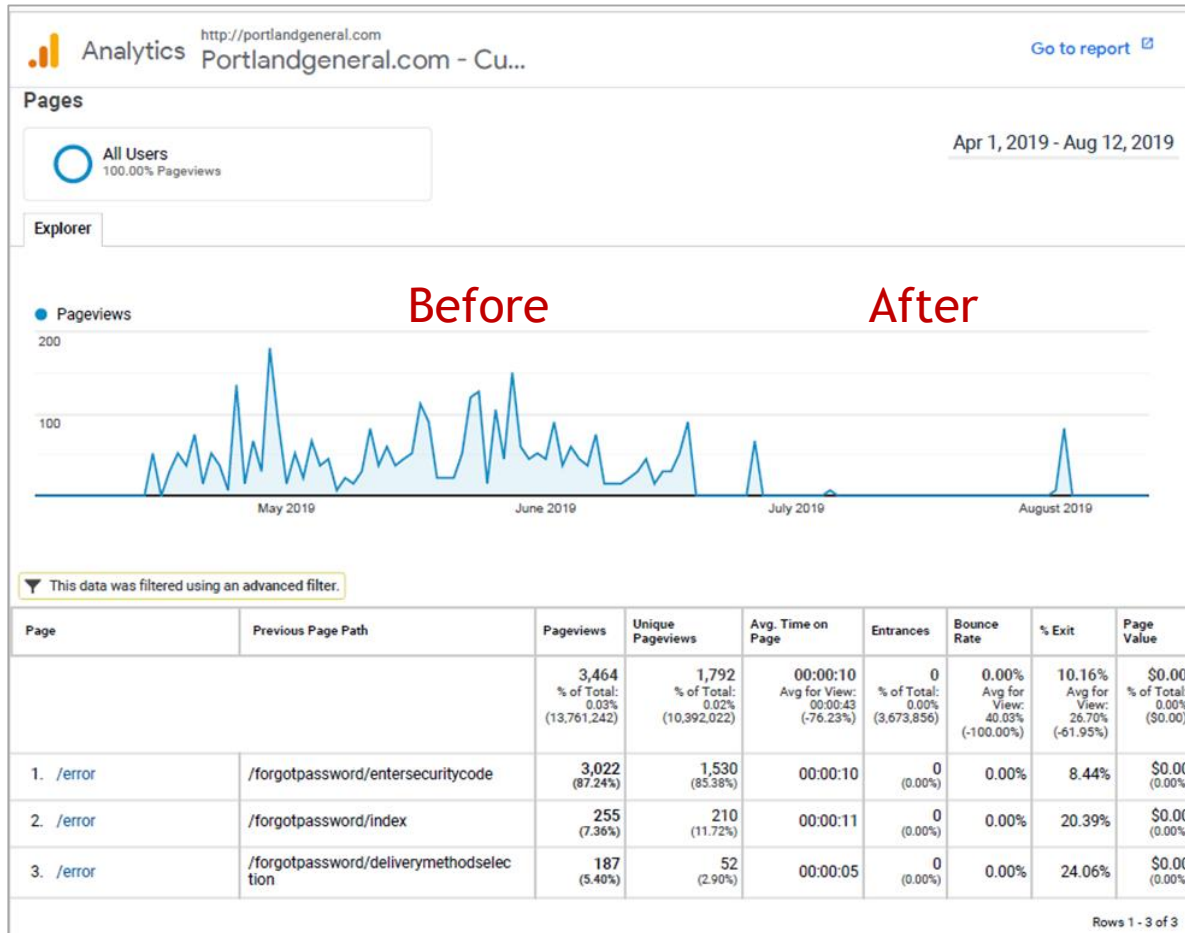
PIN Code

Display this page after 3 failed attempts at Sign In.

Use data with the highest probability to exist in the customer information system.

Forgot Password

Again, look at your data . . .



Navigation

Pay Bill from Account Summary

Portland General Electric

Account Summary

CHEREE HEPPE

Account List: Cheree Heppe

Account Number: 0018 84968-257129-8
Add or Remove Accounts

Service Address: 3004 SE LAKE RD
MILWAUKIE, OR 97222

Email Address: chris@usabilityconcepts.com
Change Email Address
Change Password
Manage Alerts

Current Bill

Amount Due: \$78.65

Due Date: 03/16/2017

Last Payment: \$83.68 received on 02/12/2017

Need more time to pay?

View Bill
View History
Ways to Pay

Pay Bill

Billing & Payment Options

Paperless Bill Enrolled
Change Bill Delivery

Auto Pay Not Enrolled
Sign up for Auto Pay

Equal Pay/Average Pay Not Enrolled
Sign up for Equal Pay

Renewable Power Not Enrolled
Sign up for renewable power

Energy Tracker

Estimated usage as of 03/16/2017

Daily/Hourly Usage
Compare Bills
Ways to Save

Billing Cycle: Day 17 of 29

Electricity Used: \$42 (279 kWh)
Estimated Next Bill: \$57 - \$78

Pay Bill

Enter your payment information.

CHEREE HEPPE

Account Number: 0006 41173-153114-1

Service Address: 3836 SE 49TH AVE
PORTLAND, OR 97206

Payment Information

Payment Date: 08/11/2019

Payment Amount: \$78.65

If you are on the Equal Pay or Average Pay plan, the account balance may not reflect the amount due.

Make a one-time payment by credit card or debit through BillMatrix.

Bank Account Information

Tell us which checking account you would like to use to make your payment.

Account Selection

Use account: *****7989

Enter a different account

Next

Smart defaults make it one-click

Pay Bill

Transaction Successful

Your authorization for payment of \$78.65 was successfully sent.

Your confirmation number is ELEC-3340-11WBS.

For details, [download your payment confirmation](#).

Done

Confirmation Page - Done button goes to Account Summary which shows \$0.00 due

Pay Bill

Payment Summary & Authorization

Please confirm that the information shown below is correct before authorizing it.

Routing Number	Bank Account Number
323075181	654321
Payment Date	Payment Amount
08/11/2019	\$78.65

By clicking on Submit, I authorize PGE to deduct a payment of \$78.65 from my bank account listed above.

Once you click on Submit, your payment cannot be cancelled.

Previous Submit

Summary Page

35

Setting Design Goals

Avoid dark usability patterns.



Setting Design Goals

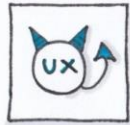
Avoid dark usability patterns.

a **dark pattern** is a misleading or otherwise deceptive UI/UX decision that tries to exploit human psychology to get users to do things they don't really want to do.

Harry Brignull (PhD Cognitive Science)
August 2010

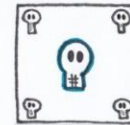
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DARK PATTERNS

UX Knowledge Base Sketch #29



DARK PATTERNS ARE



TRICKS

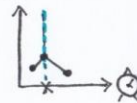
THAT MAKE THE USERS DO THINGS THEY DID NOT MEANTO.

FINE LINE BETWEEN INFLUENCING USERS' BEHAVIOR AND TRICKING THEM!

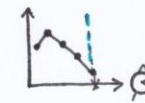
DARK PATTERNS CAN WORK IF SOMEONE IS LOOKING FOR SHORT-TERM RESULTS.

vs.

USING DARK PATTERNS HAS A NEGATIVE IMPACT IN THE LONG-TERM



ONLY INITIAL SUCCESS, NOT SUSTAINABLE



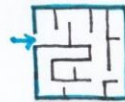
USERS WILL SWITCH TO MORE ETHICAL PRODUCTS / SERVICES

THE MOST COMMON TYPES



FORCED CONTINUITY

FREE TRIAL → CHANGES TO A PAYING SCHEME WITHOUT WARNING



ROACH MOTEL

THE START IS EASY (SIGN UP / SUBSCRIPTION), QUITTING IS HARD



GROWTH HACKING THROUGH SPAMMING

YOU BECOME THE SPAMMER WITHOUT KNOWING IT



DELIBERATE MISDIRECTION

FOCUSING THE USERS' ATTENTION ON THE MORE EXPENSIVE OPTION, HIDING THE CHEAPER WAY



OBSCURED PRICING

MAKING IT HARD TO COMPARE THE PRICES



SNEAK INTO BASKET

A RANDOM ADDITIONAL ITEM APPEARS IN YOUR BASKET (WITHOUT YOUR CONSENT)



BAIT & SWITCH

USE A CONVENTION, PATTERN IN A WAY TO MAKE THE USER FALSELY ASSUME SOMETHING



DISGUISED ADS

AN AD LOOKING LIKE ANOTHER TYPE OF CONTENT / NAVIGATION



ROADBLOCK

A POP-UP INTERRUPTS YOUR INTENDED ACTION



HIDDEN COSTS

AT THE CHECKOUT, A NEW, UNEXPECTED COST APPEARS



PRIVACY ZUCKERING

SHARING MORE PRIVATE INFO THAN YOU WANT



MISINFORMATION

E.G. CONFUSING
- COLOR, CONTRAST
- LANGUAGE

TRICK QUESTIONS
CHECK BOX
TREACHERY

Setting Design Goals

Avoid dark usability patterns.

Confirmshaming

The act of guiltting the user into opting into something. The option to decline is worded in such a way as to shame the user into compliance.

The screenshot shows the Amtrak website's travel protection offer page. The header includes the Amtrak logo, user account information (My Account, 1,160 pts), language selection (English), and a search bar. Navigation links for DESTINATIONS, EXPERIENCE, DEALS, SCHEDULES, GUEST REWARDS, TRAIN STATUS, and MODIFY TRIP are visible. The main content area features a "RECOMMENDED: ADD TRAVEL PROTECTION" header with a note that the offer expires when booking is finalized. The offer text states, "Relax, peace of mind is only a click away." The "Yes!" option is selected and labeled "Highly Recommended". The price is shown as \$9.00 per traveler. A testimonial quote reads, "Nothing goes wrong when I travel." - Familiar with Murphy's Law? There's a first time for everything. The "No" option is worded to suggest the user is responsible for non-refundable expenses. A "Review Period" section states that if the user is not completely satisfied, they have 10 days to request a refund. The offer is recommended and offered by Allianz Global Assistance. Buttons for "BACK" and "CONTINUE" are at the bottom.

RECOMMENDED: ADD TRAVEL PROTECTION Offer expires when booking is finalized.

Relax, peace of mind is only a click away.

Yes! Protect my trip to Seattle for just **\$9.00** per traveler (\$18.00 total). **Highly Recommended**

- ✓ **Compensation:** Get back up to 100% for covered trip cancellation and trip interruption
- ✓ **Peace of mind:** Insurance for loss, damage or theft of your belongings
- ✓ **Receive more:** Reimbursement for eligible meals and accommodations when your trip is delayed
- ✓ **Help when you need it:** 24/7 assistance in the event of a travel or medical emergency

“Nothing goes wrong when I travel.” - Familiar with Murphy's Law? There's a first time for everything. ”

No, I choose not to protect my **\$328.00** trip and understand by declining coverage, I am responsible for all non-refundable expenses.

18,412 customers protected their trip in the last 7 days

Review Period: If you're not completely satisfied, you have 10 days (or more, depending on your state of residence) to **request a refund**, provided you haven't started your trip or initiated a claim. Premiums are non-refundable after this period.

Recommended: offered and sold by Allianz Global Assistance. Underwritten by Jefferson Insurance Company or BCS Insurance Company. Terms and exclusions (incl. for pre-existing conditions) apply. [Plan details and disclosures.](#)

BACK **CONTINUE**

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Confirmshaming

The act of guiltting the user into opting into something. The option to decline is worded in such a way as to shame the user into compliance.

The screenshot shows the Amtrak website's travel protection offer. The header includes the Amtrak logo, user account information (My Account, 1,160 pts), language (English), and search/help options. The navigation bar lists DESTINATIONS, EXPERIENCE, DEALS, SCHEDULES, GUEST REWARDS, TRAIN STATUS, and MODIFY TRIP. The main content area is titled 'RECOMMENDED: ADD TRAVEL PROTECTION' and includes a note 'Offer expires when booking is finalized.' The offer text reads: 'Relax, peace of mind is only a click away.' Below this, there are four bullet points: 'Yes! Protect my trip to Seattle for just \$9.00 per traveler (\$18.00 total). Highly Recommended', 'Compensation: Get back up to 100% for covered trip cancellation and trip interruption', 'Peace of mind: Insurance for loss, damage or theft of your belongings', and 'Receive more: Reimbursement for eligible meals and accommodations when your trip is delayed'. A quote follows: '“Nothing goes wrong when I travel.” – Familiar with Murphy's Law? There's a first time for everything. ”'. A red box highlights the decline option: 'No, I choose not to protect my \$328.00 trip and understand by declining coverage, I am responsible for all non-refundable expenses.' Below this, a red warning icon and text state: 'Your trip is NOT protected.' A social proof statement says: '18,412 customers protected their trip in the last 7 days.' At the bottom, there is a 'Review Period' section and a disclaimer: 'Recommended, offered and sold by Allianz Global Assistance. Underwritten by Jefferson Insurance Company or BCS Insurance Company. Terms and exclusions (incl. for pre-existing conditions) apply. Plan details and disclosures.' The page has 'BACK' and 'CONTINUE' buttons at the bottom.

Looks like an error message

Setting Design Goals


Avoid dark usability patterns.

Confirmshaming

The act of guiltng the user into opting into something. The option to decline is worded in such a way as to shame the user into compliance.

Frequent flyer and more ▾

Protect your flight Recommended

 **Your flight is not protected.**
Over \$179M worth of trips were cancelled in 2018 without insurance.

Reconsider

Trip Protection can cover you for unexpected events. Here's how:

Your connecting flight home is canceled. It's late. You're tired. The first thing you'll do is to book another flight. Trip Protection can reimburse you for the cost of the flight.

How would you like to pay?

Debit/Credit Card Masterpass



Outages

“Customers don’t expect you to be perfect. They expect you to fix things when they go wrong.”

*Donald Porter
VO, British Airways*

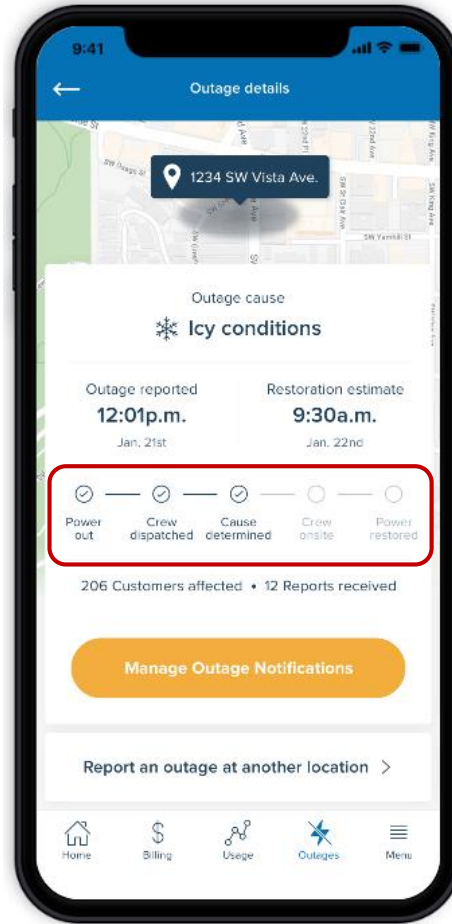
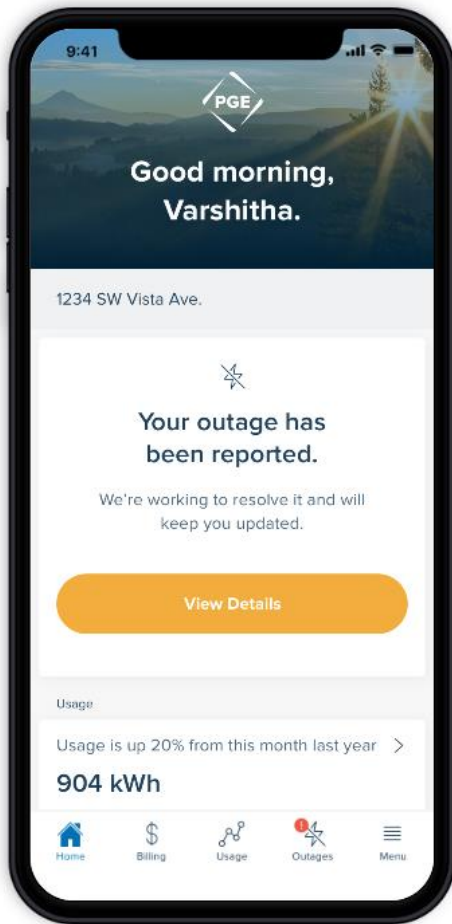
Outage Reporting Elements

None of these guidelines will positively affect the customer experience without accurate, timely restoration estimates, crew status and outage cause.

- **Allow customers to find an outage location by entering the address.**
- **Alert customers of a power outage when they sign in.**
- **Provide pro-active outage alerts and notifications.**
- **Offer notifications at the time an outage is reported.**
- **Allow customers to change or cancel outage alerts.**
- **Limit the number of notifications to 3 or 4 within a 12-hour period.**

Outage Reporting Elements

Guidelines



Excellent use of lineal timeline.

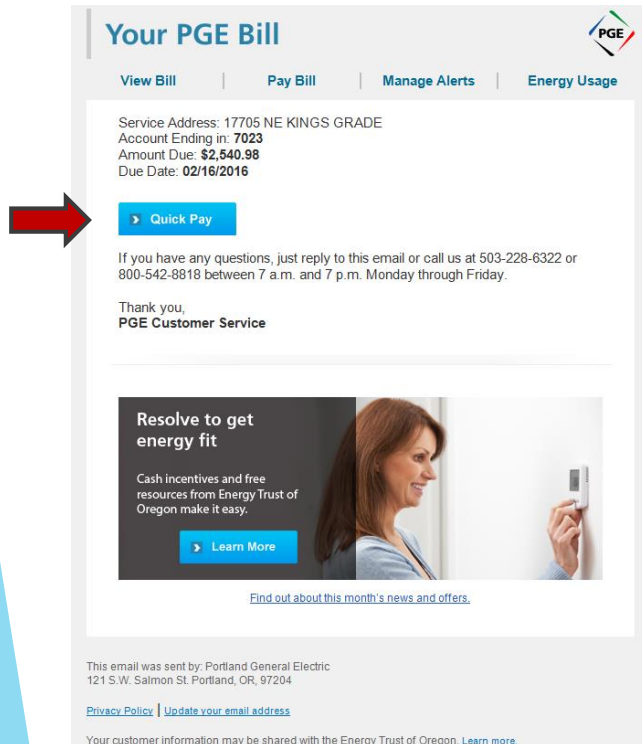
Multiple paths for an outage update (details button and message badge).

Pay Bill

Quick Pay

Taking the functionality of texting and the concept of guest payment and email notifications to create, “Click to pay”.

Resulting in . . . seamless navigation across channels.



Your PGE Bill

[View Bill](#) | [Pay Bill](#) | [Manage Alerts](#) | [Energy Usage](#)

Service Address: 17705 NE KINGS GRADE
Account Ending in: 7023
Amount Due: **\$2,540.98**
Due Date: 02/16/2016

[Quick Pay](#)

If you have any questions, just reply to this email or call us at 503-228-6322 or 800-542-8818 between 7 a.m. and 7 p.m. Monday through Friday.

Thank you,
PGE Customer Service

Resolve to get energy fit

Cash incentives and free resources from Energy Trust of Oregon make it easy.

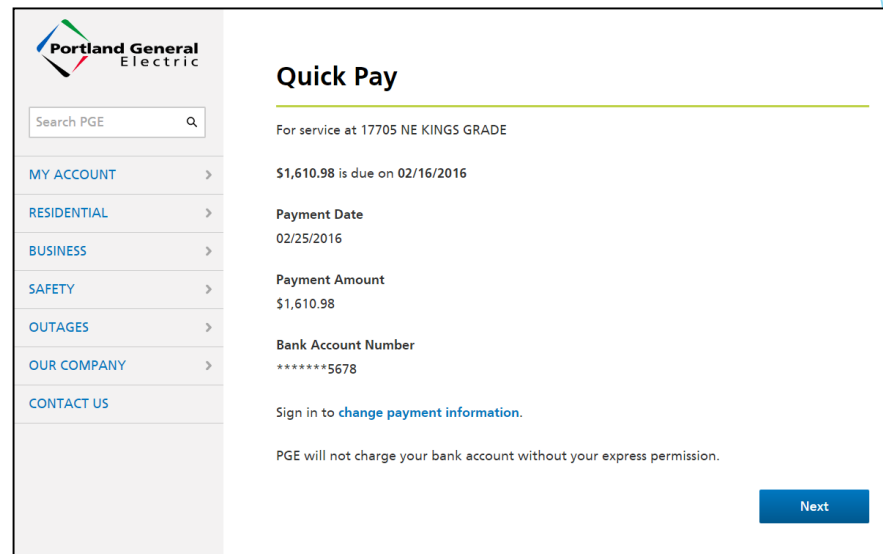
[Learn More](#)

[Find out about this month's news and offers.](#)

This email was sent by: Portland General Electric
121 S.W. Salmon St. Portland, OR, 97204

[Privacy Policy](#) | [Update your email address](#)

Your customer information may be shared with the Energy Trust of Oregon. [Learn more.](#)



Portland General Electric

Search PGE

- MY ACCOUNT >
- RESIDENTIAL >
- BUSINESS >
- SAFETY >
- OUTAGES >
- OUR COMPANY >
- CONTACT US

Quick Pay

For service at 17705 NE KINGS GRADE

\$1,610.98 is due on 02/16/2016

Payment Date
02/25/2016

Payment Amount
\$1,610.98

Bank Account Number
*****5678

Sign in to [change payment information.](#)

PGE will not charge your bank account without your express permission.

[Next](#)

Summary Pages

Guidelines

Pay Bill

Payment Summary & Authorization

Confirm the following information is correct before submitting your payment.

Routing Number	Bank Account Number
323075181	****7989
Payment Date	Payment Amount
06/25/2019	\$149.00

By clicking on Submit, I authorize a payment of \$149.00 from my bank account listed above.

Once you click on Submit, your payment cannot be canceled.

[Previous](#)

Display the word Summary in the title or subtitle.

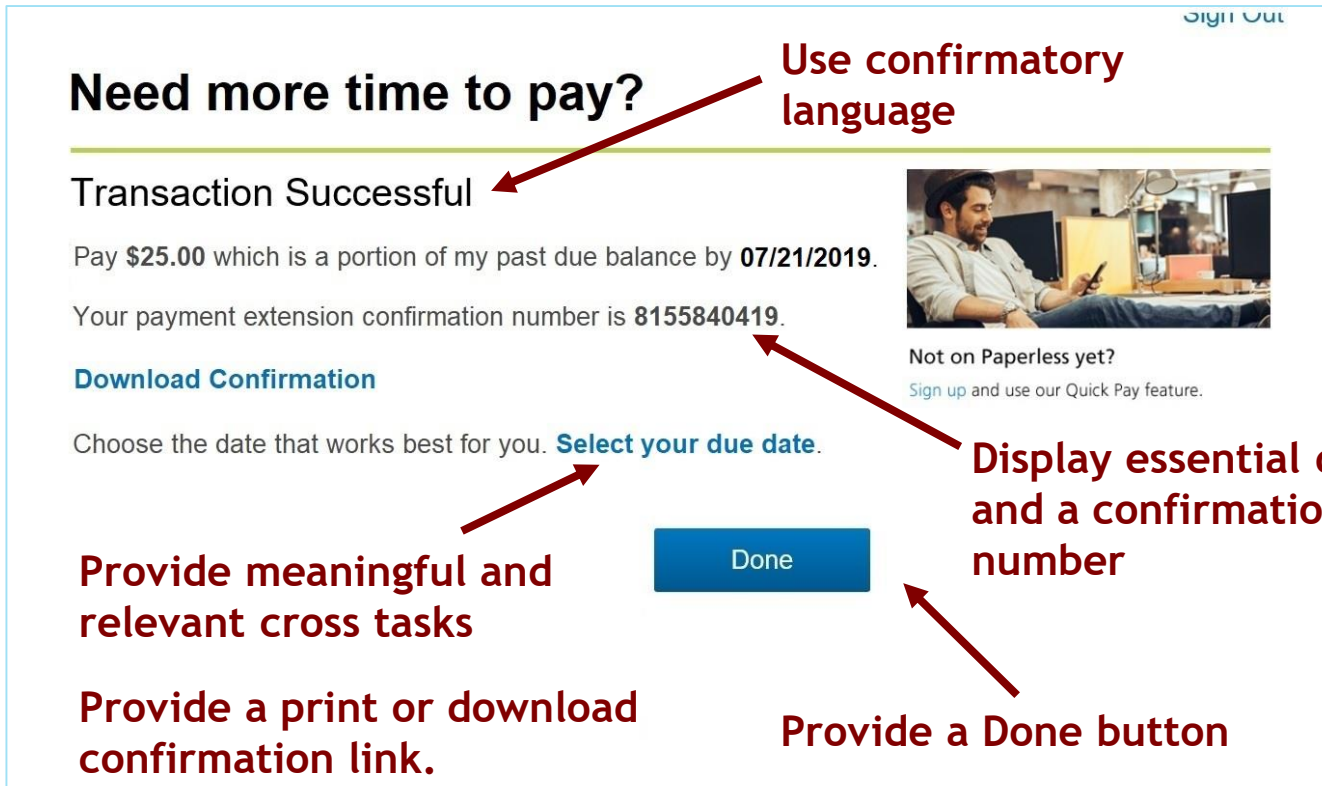
Briefly describe the purpose of the page.

Provide a Submit button.

Display data in static fields in the same order it was entered.

Confirmation Pages

Guidelines



The screenshot shows a payment confirmation page with the following elements and annotations:

- Need more time to pay?** (Annotation pointing to the main heading)
- Use confirmatory language** (Annotation pointing to the main heading)
- Transaction Successful** (Main heading)
- Pay \$25.00** which is a portion of my past due balance by **07/21/2019**.
- Your payment extension confirmation number is **8155840419**.
- Download Confirmation** (Link)
- Choose the date that works best for you. **Select your due date.** (Link)
- Not on Paperless yet?** (Text)
[Sign up](#) and use our Quick Pay feature.
- Done** button
- Provide meaningful and relevant cross tasks** (Annotation pointing to the 'Select your due date' link)
- Display essential data and a confirmation number** (Annotation pointing to the confirmation number)
- Provide a print or download confirmation link.** (Annotation pointing to the 'Download Confirmation' link)
- Provide a Done button** (Annotation pointing to the 'Done' button)

Workshop Description

If you are considering a website redesign or launching a mobile app, this workshop is an excellent opportunity for fostering teamwork and gaining knowledge for making informed decisions about delivering exceptional customer experiences.

- 12 hours (one full day and one half-day)
- 5 Modules
- Hands-on exercises
- Principles, guidelines and best practices
- Examples of design patterns cross-industry

Workshop Deliverables

Participants will receive a **60-page workbook** that includes over **200 design guidelines** for the key self-service tasks that really matter:

- ▶ Registration
- ▶ Sign In
- ▶ Forgot Password
- ▶ Account Summary
- ▶ Start Service
- ▶ Outage Reporting
- ▶ View/Pay Bill
- ▶ Auto Pay
- ▶ Paperless Billing

Over **300 slides** with best-in-class examples and hands-on exercises.



Workshop Objectives

By the end of the workshop you will be a thought leader in your organization who promotes the importance and value of the user experience.



Customer Experience (CX) testing is more than just User Acceptance Testing (UAT), and it pays off!

Analysis from Bain & Company shows that companies that excel in customer experience **grow revenues 4%–8% above their market**. The importance of brilliant customer experience is obvious; however, many companies are held back by legacy debt as well as increasing pressure on budgets, staffing and training. CXNewtrotk.com Delivering Brilliant Digital Experiences, 8/8/2019

Customer Experience Leaders Outperform The Market

11-Year Stock Performance of Customer Experience (CX) Leaders vs. Laggards (2007-2017)



Forbes.com Why Focus On Customer Experience?

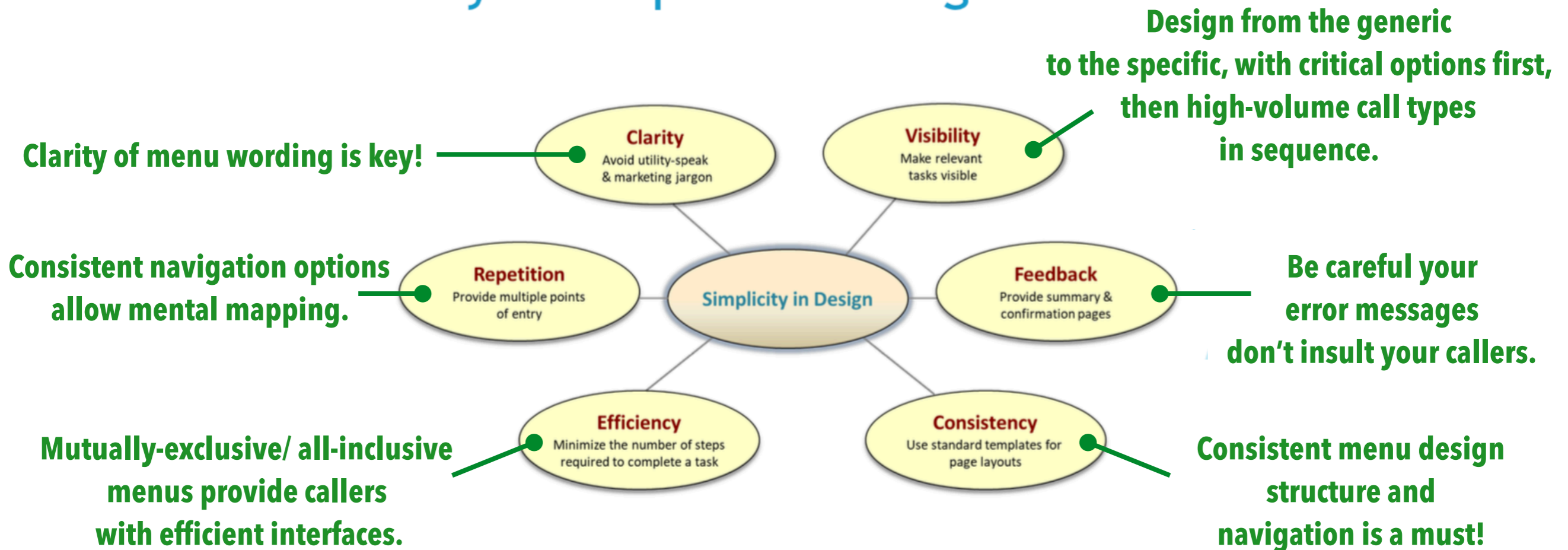




Consistency in design principles across platforms and channels pays off! ...and as Chris said: “Frictionless experiences create digital loyalty.”

Our design mantra: IVRs must be clear and concise, with mutually-exclusive and all-inclusive menus in a stable system, whether speech is primary or offered as a modality choice.

Key Principles of Design





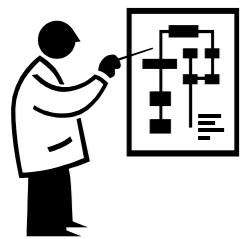
There are two key components to improving an IVR.

First, is an IVR Workshop, which comes in several flavors...



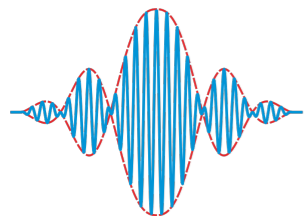
An IVR Workshop

Where your in-house team is trained ...



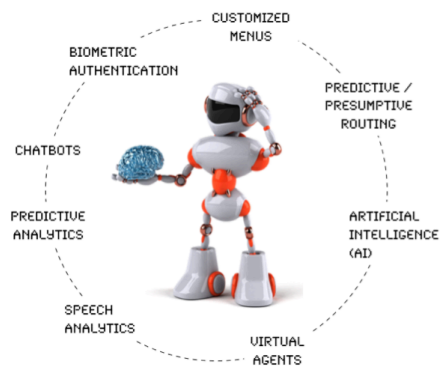
Deconstruct - Reconstruct Workshop

... in best-in-class menu and call flow design criteria and on-going forensics.



Move to Speech Workshop

... in a company's attempt to incorporate speech into its IVR.



Emerging Technologies Workshop

... on how emerging technologies may impact caller experience in your IVR.





**There are two key components to improving an IVR.
The second is a highly diagnostic usability test.**



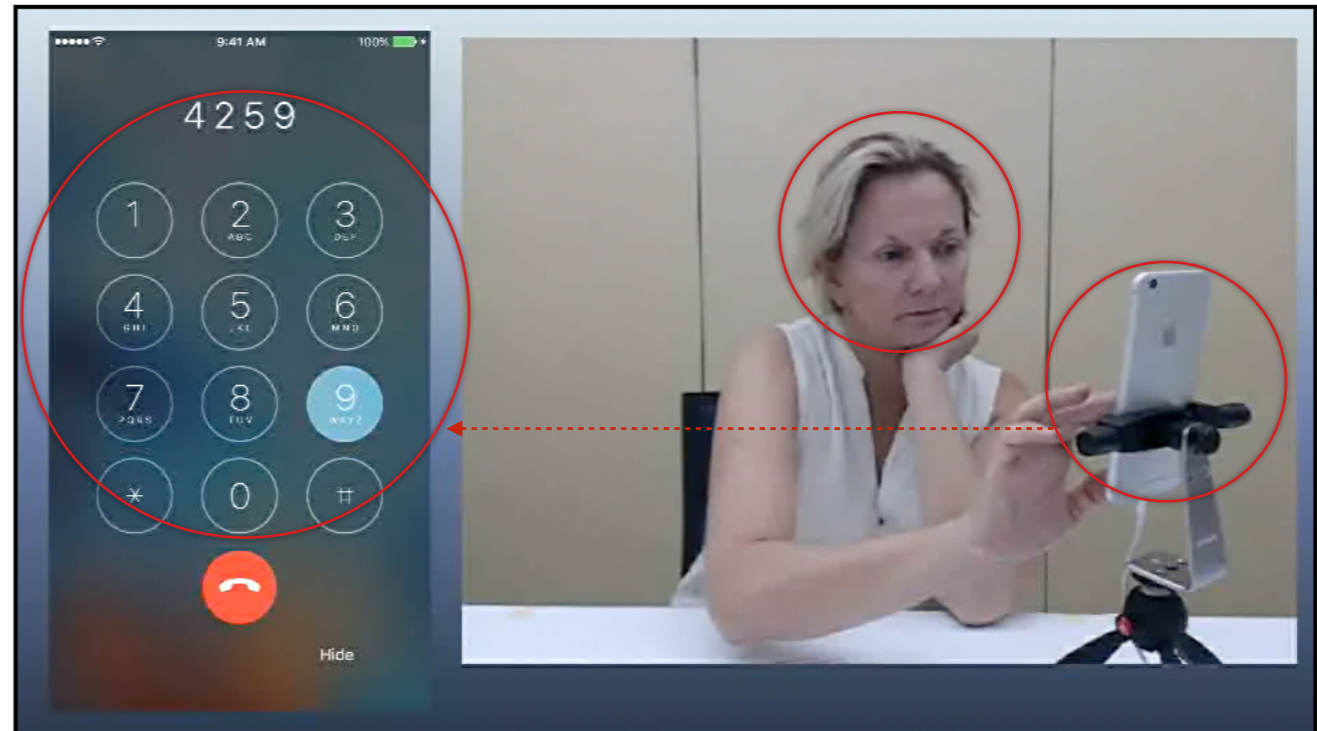
**An IVR
Usability
Test**



Where you actually watch your callers use your IVR!

**“Wizard of Oz”
Usability Test
of menus and
call flows**

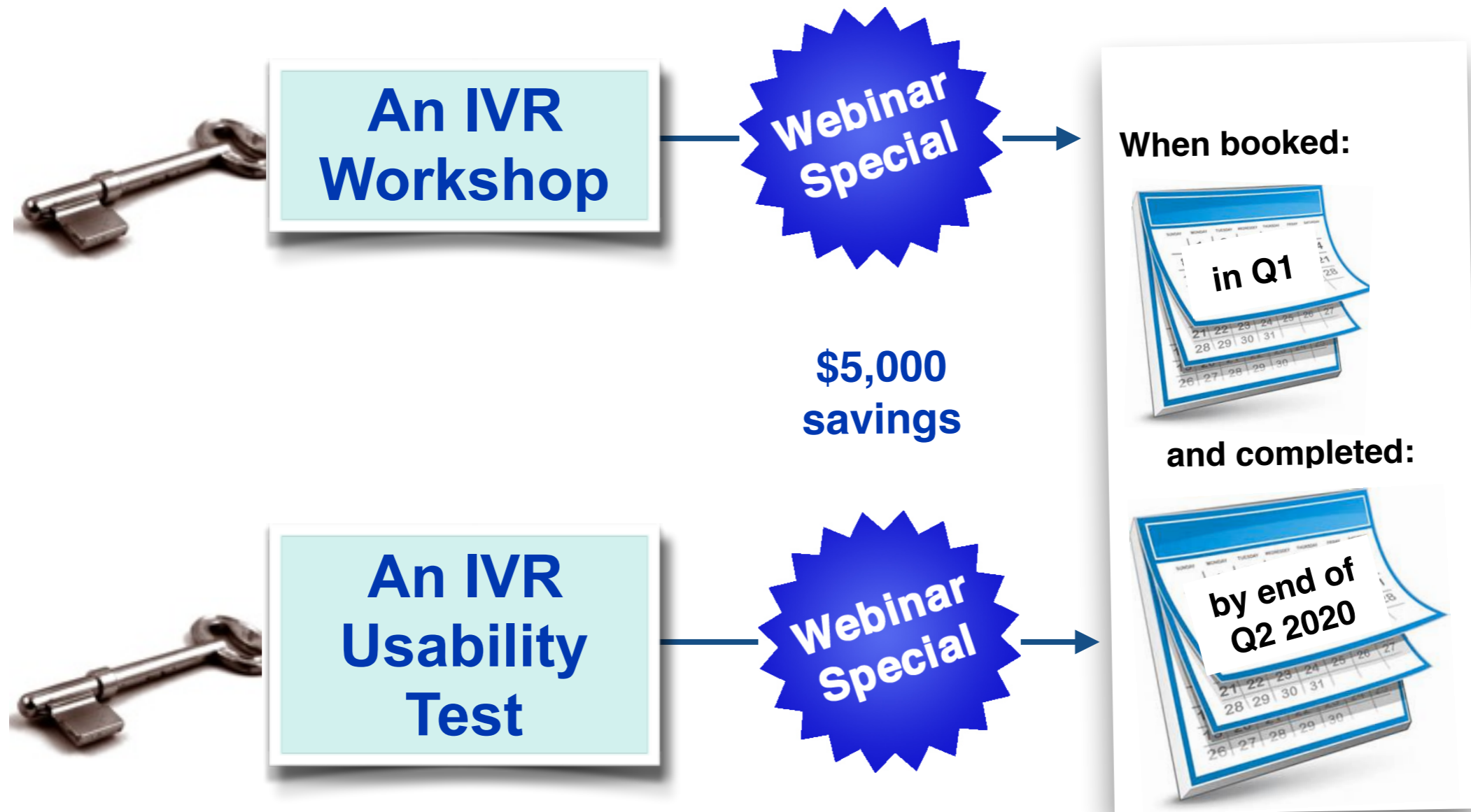
**Live System
“Buff the Diamond”
Usability Test for an
end-to-end review**





There are two key components to improving an IVR.

Here's where we can help you develop your high-performing IVR:



...also...



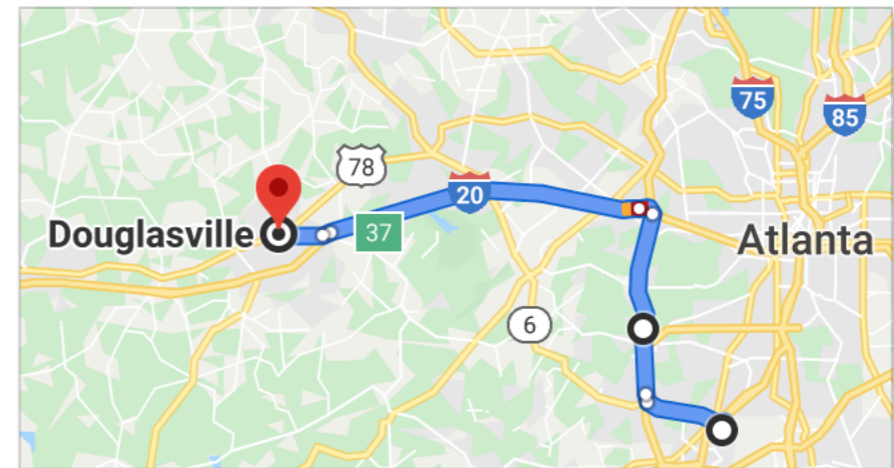


... and to answer a question we often get asked:
“When is the next IVR Doctors’ Master Class?”

**Answer: An IVR Doctors’ Master Class
in designing and managing
high-performing IVRs**



Host Utility:



ATL to GSP: 27 miles





Before we get to your questions, don't forget, when it's all said and done with any new technology...





It's time to take your pulse.

Next steps for us:

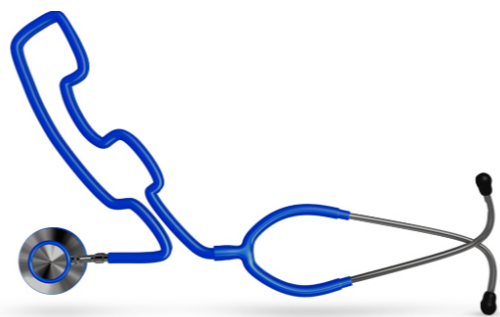
Email your copy of today's deck with info on discounts.



Q & A

Questions via chat





IVR DOCTORS
is a collaboration of
Brandt Marketing Group, Inc.
and
Camack Consulting, Inc.