

The Changing Telephone Channel

Optimizing IVR + Speech Recognition in an Age of Smartphones



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Workshop Syllabus

EIG instructional techniques aim to transfer knowledge quickly—not just a collection of conference presentations recycled into a classroom setting, but expert knowledge, delivered with state-of-the-art instructional techniques, by instructors who are subject matter experts themselves.

Each module is pre-developed, and then tailored to the group on the day. Focus is on ensuring that you are able to apply this knowledge immediately to your own specific IVR context. Results are personalized, measurable, and actionable. The modules are shown in approximate order, but will vary from delivery to delivery.

Legend



Interactive Lecture: Rapid delivery of some specific content. Questions and interruptions are encouraged. These lectures are always short

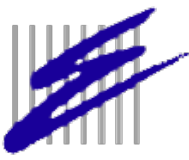


Work Session: The group works together, but each individual or corporate team use their own IVR as the working example. A working session advances your takeaway design.



Lab: Each individual or corporate team works separately on their own IVR. The instructor moves from table to table and interacts privately.

See high-level module descriptions on the following pages. No single workshop presents all modules, as each workshop is customized for a specific audience and time span. Note that durations are estimates only. All modules include a small amount of lecture and demonstration, but work sessions and labs are primarily hands-on activities – aimed at learning by doing. See the agenda for details on your specific workshop.



IVR Overview and Business Discussion

(30 Minutes)

- Why is telephone self-service not going away?
- How do I continue to squeeze out even more cost savings while still improving customer satisfaction?
- Do I really need speech recognition? Why? How? When?
- How do call routing, brand loyalty, and improved security offer benefits that go beyond self-service?

IVR Triage

(45 Minutes)

- What is the condition of my IVR now? If I don't know, then how do I find out?
- Why do people call my IVR?
- What are the key problems that keep me awake at night?

Developing an IVR Migration Plan

(30 Minutes)

- How do I migrate from where I am to where I want to be, using small, low-risk steps?
- Which IVR functions service the majority of my callers?
- How do I streamline the heavy-hitters for speed and accuracy?
- What do I do with the outliers?
- What "quick hits" will give me maximum improvement at minimum cost?
- How do I represent my plan to management? To my development team? To testers?

The High Level Call Flow

(45 Minutes)

- How do I get the "big picture" right?
- How do I avoid high-level mistakes that will cost me down the road?
- What high-level decisions can be put off until later?

Human Factors, Ergonomics, and Usability

(15 Minutes)

- Why do so many people hate IVR?
- Why hasn't speech recognition gotten any real traction?
- What about avatars, personalities, male v. female voices, and branding?
- How do I create meaningful and relevant test cases?

Greeting the User and Starting the Conversation

(30 Minutes)

- How do I ask about and optionally switch between English and other languages?
- What about personalization and customization based on ANI?
- How do I avoid "Please listen carefully, your options may have changed" and other bad ideas?

Identification and Verification

(30 Minutes)

- Which do I ask for first: the reason for calling, or the identity of the caller?
- How do I handle different requirements to balance security with convenience?
- What about voice biometrics?
- What if the caller zeroes out before I can ID?

Scripting Your Menus

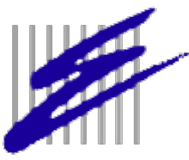
(45 Minutes)

- What are some simple guidelines for writing menu prompts?
- What are common pitfalls to avoid in menu scripting?

Getting the Voice Right

(30 Minutes)

- What are the differences between a non-professional, "radio announcer," voice talent, and voice actor?
- How do I personify my brand?
- Who to choose - female or male?
- How do I keep my voice consistent over the life of my application?



Organizing Your Menus

(30 Minutes)

- Isn't natural language going to replace menus? If so, why do I need to understand menus?
- What are best practices for touch-tone menu design?
- How do I design speech menus without sacrificing my touch-tone interface?
- What is the best balance between breadth and depth of menus?

**Open Dialogue Designs
("How May I Help You?")**

(30 Minutes)

- What's the difference between "open" and "directed" dialogues?
- What is a "statistical language model" (SLM)?
- What does "natural language" really mean, and what do I need to know about it?
- How do I fall back to touch-tone when my SLM doesn't work?
- Can I mix SLM with other styles of dialogue?

**Touch-Tone
Error Recovery**

(30 Minutes)

- What do I do when users don't interact at all?
- What are the standard keys for menus, navigation, and skipping forward or back?
- How do I handle pound-sign errors?
- What special keying issues affect my mobile phone users?

**Speech-Recognition
Error Recovery**

(30 Minutes)

- What are false acceptance and false rejection errors?
- What do I do when conditions are ambiguous?
- What about anger and other emotions?

**Drill-Down and
Tapering Techniques**

(15 Minutes)

- How do I degrade from speech recognition when it's noisy?
- How many times do I try to get an answer?
- If I have to start over, how far back do I go?
- How do I avoid trapping my user in endless loops?
- If I have to transfer the caller to an agent, how do I do it gracefully and with minimal impact on the user experience?

General Scripting Exercises

(30 Minutes)

- How do I deliver structured forms and complex spoken data?
- Can I mix synthesized and recorded speech? How? When?
- How to read back numbers.

Wizard of Oz Testing

(60 Minutes)

- What is WoZ testing and how does it benefit me?
- Can I run these tests myself?
- How much is too much testing, and how do I balance risk with cost?

**Monitoring, Testing,
and Tuning**

(30 Minutes)

- What are the components of IVR that most need to be monitored and tuned?
- What skills and tools are required for professional ongoing tuning?
- What is an effective testing roadmap from IVR concept to deployment and beyond?