Federal Educational Organization Expands IVR Capabilities with Solutions from Avaya and INI

Challenge:

Expand self-service functions on existing interactive voice response applications to handle growth in call volume.

Solution:

- Avaya Interactive Response
- DEFINITY Servers
- INI Government applications
  — AudioMENUS
  — AudioFORMS

Value Created:

Instituting the new self-service functionality increased customer satisfaction, reduced call center costs and increased agent productivity by automating routine requests.

A federal educational organization was created in 1980 by combining offices from several federal agencies. Its original directive remains its mission today — to ensure equal access to education and to promote educational excellence throughout the nation. The organization's 4,800 employees and $54.4 billion budget are dedicated to:

- Establishing policies on federal financial aid for education, and distributing as well as monitoring those funds

- Collecting data on America's schools and disseminating research

- Focusing national attention on key educational issues

- Prohibiting discrimination and ensuring equal access to education

The federal educational organization offers more than 15 loan types that enable students to complete their education. By the time most students graduate from college, they have several education loans to repay with varying terms and repayment schedules. The Higher Education Act (HEA) created a loan consolidation program that lets students combine their federal education loans into one new loan, giving them a single monthly payment at what often is a lower interest rate.

The educational organization established an 800 number to support this program. As call volume grew, the organization realized it needed to respond by either increasing its number of agents or furthering its use of self-service applications. Based on several factors, the organization chose the latter course: to expand the use of its Interactive Voice Response (IVR) applications.

The educational organization selected a solution that combined Avaya Interactive Voice Response with government applications developed by Interactive Northwest, Inc. (INI). INI is a Premier-level member in the Avaya DevConnect program.

A Business Challenge

Based on the HEA, the educational organization provides a loan consolidation program through both the Federal Family Education Loan (FFEL) Programs and the Direct Loan Program. Under these programs, a borrower's loans are paid off and a new consolidation loan is created. These programs simplify loan repayment by combining several types of federal education loans (that may have different terms and repayment schedules or may have been made by different lenders) into one new loan. The interest rate may be lower than on one or more of the underlying loans. In addition, the monthly payment amount on a consolidation loan is usually lower and the amount of time to repay may be extended beyond what was available in the separate loan programs. These features should result in more manageable debt and should make borrowers less prone to default.

The federal educational organization established an 800 number to support the consolidation program. Borrowers could check the status of their applications using their touch-tone keypads. However, to obtain program information or an application form, callers had to speak with a call center agent.

As call volume grew, the organization realized it needed to respond by either increasing its number of agents or furthering its use of self-service application. Based on projected return on investment, scalability and required service levels, the organization elected to expand the use of its IVR applications.

Key Capabilities of the Solution

The solution included Avaya Interactive Voice Response and DEFINITY Server combined with INI government applications.

Avaya Interactive Voice Response helps improve customer service by giving customers dynamic, real-time voice access to the information they need.

Avaya DEFINITY Servers offer a scalable solution with the ability to grow without changing an entire communication system.

INI's government applications help government agencies automate the dissemination of information. In this case, the solution included:

- AudioMENUS, a flexible tool for easily modifying call flows

- AudioFORMS, a tool providing a structured environment for collecting information in individual "fields"

Seamless Transition to a New System

The educational organization issued a Request for Proposal to address the call center equipment and capabilities required to further automate its loan consolidation support line. The project required implementation of an entirely new system.

To ensure that all of the organization's requirements and constraints were addressed, Avaya and INI conducted

an initial kickoff meeting, where they produced a detailed functional specification and project plan. The system was implemented in two stages. First, Avaya installed and conducted training for the switch and call center equipment. Once the equipment was functional, INI followed with installation, testing and training of the IVR applications and integration components.

The Avaya/INI solution was implemented as a new system, rather than as a replacement. Leveraging information gathered from the educational organization along with INI's call center application experience and best-known practices, INI diagrammed detailed call flows so that the organization could clearly review how the IVR system would perform prior to development and implementation.

In the new system, the educational organization's MCI Network service routes incoming calls to the IVR application, which resides on the IVR system at each of its two primary call centers in Montgomery, AL and Louisville, KY. To ensure a seamless user experience, INI developed an interface to MCI that establishes the point in the dialog where the application should begin, based on initial prompting handled by MCI. Callers can choose to interact with the application in either English or Spanish. Using a combination of touch-tone keypad entries and voice prompts, callers can choose to request a loan consolidation application, hear the status of a loan in process, hear general Direct Loan Consolidation information, or speak with a Customer Service Representative (CSR). Since the self-service solution was intended to handle higher caller volumes while maintaining a superior level of customer service and user friendliness, callers are frequently provided the opportunity to connect with a CSR.

Callers who request a loan consolidation application may provide basic information

over the phone and receive an application packet in the mail or may hear instructions for accessing application information on the Internet.

Callers who request loan status from the application are prompted to enter their unique ID number. Through an interface developed by INI, the IVR application queries the educational organization's Informix database and returns the borrower's application status in real time. For each of the five stages in the process, the dialog plays back a description of actions taken by the organization and what the borrower can expect to happen next.

Callers who request to hear general Direct Loan Consolidation information are provided choices as to the types of information available.

As a Premier Avaya DevConnect member, INI worked hand-in-hand with both the educational organization and Avaya to design and configure the solution for optimal performance with both the Avaya platform and DEFINITY server. With its broad experience in developing self-service IVR applications and working knowledge of the educational organization's technology and telecommunications environments, INI was able to meet the rapid timetable for this project in the required budget.

Benefits for the Organization

The Avaya/INI solution yielded several benefits:

- On time and on budget implementation translated to the educational organization maintaining its allocated financial and resource budget.

- Since the majority of callers are now serviced automatically rather than by call center agents, the educational organization has avoided the expense of staffing agents for these callers,

which would be roughly tenfold the expense of the self-service approach.

- The IVR application was designed to be tightly coupled with the client's environment. Although invisible to the caller, capabilities such as routing through the existing MCI Network service and real-time database access improved the caller experience and quality of information provided.

- The initial needs analysis revealed a need for multiple language support, specifically Spanish, which increased the number of callers that could be serviced and improved customer satisfaction among Spanish-speaking callers.

- The INI host connect utility optimizes the data collection and playback process and provides the flexibility to readily integrate with any database system the educational organization might implement in the future.

- The INI self-service IVR solution gives the educational organization the flexibility to readily adapt to changes in its offerings as well as in its evolving technology infrastructure. For example, INI's AudioFORMS and AudioMENUS applications include telephone-based and screen-based administration capabilities that let system administrators edit or add to phrases on an ongoing basis.

- Call center productivity has increased as a result of alleviating the need for agents to handle high volume, mundane requests and freeing agents to field more complex inquiries.

- Although the new solution resulted in automated servicing of callers, the sophisticated call routing design enabled callers to always reach an agent.

- Since the IVR application enabled callers to be serviced more efficiently, customer satisfaction was maintained in spite of increasing call volume.

- The quality of the design and effectiveness of the call flow was reflected in the performance of the IVR application, which maintained a high capture rate and, therefore, minimized the occurrence of callers opting out for a live agent.

Gary Van Gordon, INI Vice President, adds, *"We were able to meet the customer's rapid timetable for this project in the required budget. Even with that challenge, we were very pleased to receive the highest rating possible on their returned Customer Satisfaction Survey. They rated their experience working with the team as Excellent."*

ABOUT INI

Interactive Northwest, Inc. (INI) delivers customer satisfaction in self-service environments. INI works directly with clients and partners to create real-world solutions that incorporate superior design and integrate best-in-class voice response and speech-recognition technologies with existing business systems. The company provides a complete suite of services and software for the design, implementation, deployment and ongoing support of customer self-service solutions.

In particular, INI offers:

- Platform migration services, as companies migrate to more complex self-service capabilities

- Information-access solutions, automating the process of providing callers with the ability to access customer information

- Call-routing applications, including applications specifically designed for call center support, TTY recognition and prompting, and speech recognition

- Automated inbound and outbound notification applications, utilizing multi-media channels such as voice, fax, pager, e-mail and TTY

- Information collection via voice, touch-tone, fax, TTY, and integration with external databases, to deliver robust information

- Transaction processing applications, including host access and payment processing capabilities

INI has a 12+ year relationship with Avaya as an integration specialist and Avaya Interactive Response/ CONVERSANT® software developer. INI also has partnerships and development agreements with Nuance, ScanSoft/ SpeechWorks, Oracle and Intel Dialogic. INI's solutions are delighting over 1,000 customers nationwide, in a variety of industries, including government, healthcare, finance, insurance and education.

For more information, visit, www.interactivenw.com.

ABOUT AVAYA

Avaya enables businesses to achieve superior results by designing, building and managing their communications infrastructure and solutions. For over one million businesses worldwide, including more than 90 percent of the FORTUNE 500®, Avaya's embedded solutions help businesses enhance value, improve productivity and create competitive advantage by allowing people to be more productive and create more intelligent processes that satisfy customers.

For businesses large and small, Avaya is a world leader in secure, reliable IP telephony systems, communications applications and full life-cycle services. Driving the convergence of embedded voice and data communications with business applications, Avaya is distinguished by its combination of comprehensive, world-class products and services. Avaya helps customers across the globe leverage existing and new networks to achieve superior business results.

For more information about Avaya, visit www.avaya.com.

ABOUT DEVCONNECT

The Developer*Connection* Program (DevConnect) is a comprehensive set of innovative sales, support, marketing and services programs through which Avaya works with members to develop and promote their products and solutions that interoperate with Avaya solutions

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