

Score 0 (poor) to 5 (very good)

Customer Needs & Expectations		Yes	No	Score
1	Were the organisation's Strategic & Business Goals clearly defined before designing the IVR system?			
2	Does the IVR address customers' Real Needs & Expectations? (i.e. Based on actual research)			
3	Is the organisation's Brand and Image reflected through in-queue and on-hold messages, music etc.?			
4	Does the IVR offer 'Leave a Message' or automated or manual Call-Back options?			
5	Is it difficult for customers to connect with a 'Live' agent? (e.g. They must pass beyond the first menu to reach an agent)			
Facilitating Efficient Interactions. How Customers Feel about your IVR		Yes	No	Score
1	Does each menu have fewer than 4 options?			
2	Do customers have to navigate through more than 3 menu sets before getting the service that they need?			
3	Does the IVR use simple, concise words and avoid 'Jargon'?			
4	Does the IVR first describe the Action, and then the key? (e.g. For Sales, press 1)			
5	Does the IVR have a recognisable 'Persona'?			
6	Are the prompts professionally recorded and is consistent vocabulary used?			
7	Are callers disconnected because of non-response or input errors? (e.g. No 'default to live agent')			
8	If there are 'Hidden Options' in the system design, are these well documented?			
9	Does the IVR provide a Customised Experience ? (e.g. Does the system do a customer data 'look-up' (CTI) and respond with personalised information?)			
10	Is the information requested by the IVR limited to Critical Data necessary to provide self-service or optimal routing? (i.e. No unnecessary information requested)			
11	Do callers have to repeat information already provided? (Either to the system or when connected to a live agent)			
12	Are customers provided with details of and encouraged to use IVR 'Short Cuts'?			

Score 1 (poor) to 5 (very good)

	IVR Monitoring & Reviews	Yes	No	Score
1	Has the IVR system been thoroughly tested and reviewed in the past 3 months? (By Operations, Marketing and by IT teams)			
2	Have IVR statistics and reports been thoroughly analysed in the past 3 months?			
3	Is IVR performance and customer acceptance measured and tracked on a regular basis to ensure the optimal customer experience?			
4	Have customer's opinions and expectations about to the IVR been formally researched in the past 12 months?			
5	Does the organisation have a formal strategy for IVR and Self Service?			
Your Total Score >>>>				

IVR Score Card [©]		
Total Score	Diagnosis	Action Required
81+	You have a 'World Class' IVR system	Review line item scores less than 5 and implement appropriate minor remedial actions.
61-80	Your IVR Strategies, Systems and Processes are in urgent need of attention. The 'basics' are probably in place, but it is likely that callers are experiencing significant frustration and the IVR is not adding significant value to your business.	Review all aspects of Strategy, Business Processes and Technologies and implement appropriate remedial actions
50-60	Your call centre is in trouble and the IVR is creating a really poor customer experience .	Review all aspects of Strategy, Business Processes and Technologies and implement appropriate remedial actions
Under 50	Sound the alarm! Your call centre is in serious trouble. It is likely that large numbers of your customers are extremely unhappy about calling. You will need to be very careful about negative Social Media comments about your IVR. The probability is that many of your customers are already Active Detractors!	Back to the drawing board! Get professional advice!

*This Score Card and IVR evaluation model developed by Rod Jones Contact Centre Consulting © Copyright strictly reserved www.rodjones.co.za