



Best Practices for Self-Service Identification & Verification

Do you recognize me? Your customers want to feel that you truly know them. The more you can confirm about a customer from the get-go, the more trust you build, and the faster they'll reveal their intent. In the IVR, this is known as identification and verification (IDV) and it acts as the first impression for every caller.



1

Start with a phone number

Employ Automatic Number Identification (ANI) database services to match a caller's number to their info in your account system. The phone number has become a reliable personal identifier and valuable strategy for IVR identification.

2

Associate multiple phone numbers with the account

Twenty years ago, one household kept one telephone permanently affixed to the kitchen wall. Today, the average U.S. household has 3.9 associated phone numbers. (Billing systems can typically hold just two.) An ANI learning database allows you to dynamically associate new/additional phone numbers to each account, which increases verification efficiency.

3

Make second ID second nature

Don't ask for a second piece of authentication unless the added layer of security is absolutely necessary. (Doing so just makes things harder for customers.) If you need it for security purposes, use a robust Customer Relationship Manager tool with multiple data points and provide intuitive verification options like social security number or birthdate. Requesting only the last four digits shows callers you already have their personal information, respect their need for information security and are simply confirming identity.

4

Use customer data to predict intent

IVR can now get more personalized through targeted messaging and predictive intent. By positively identifying customers, companies can significantly reduce the chances of multiple transfers or drop-offs. If the customer has an outstanding balance associated with their account, for example, the IVR can immediately confirm intent and provide payment options. Bonus: This can inform optimal proactive campaigns as well.

5

Know when to ID

When a customer's ID can't be passed on to agents, there is no value in requesting it. The Number One customer complaint is needing to provide the same information multiple times. If you're capturing ID, but not passing the information along, it's time to reconsider your IDV needs. Alternatively, if your agents are ignoring screen-pops and redoing IDV, you may need to focus on training.

2.5% increase in automated authentication when using ANI Learning

53% of customers agree to add an additional phone number to their account

The average U.S. household has 3.9 associated phone numbers. Billing systems can hold just two.

The big benefit to successful IDV in an IVR? Better self-service, increase customer satisfaction and automation; decrease call-handling time and contact center costs.

Want to learn more about creating a better multi-channel customer experience? Visit us at west.com/interactive