The Definitive Guide to Automated IVR Phone Surveys
Executive Summary

How well do you know your target audience? Do you know how satisfied your customers are with your products and services? Do you know your prospects’ most pressing pain points, or what features they value most in a solution? Do you know what web sites potential customers visit, or the magazines they read, or the trade shows they attend?

The answers to these and similar questions often separate the successful businesses from the underperforming. That’s why more and more companies today are embracing the value of customer surveys, and phone surveys in particular. Phone surveys are an excellent way to measure customer satisfaction with your products and services so you can make meaningful improvements that fuel growth. They enable you to better understand your target audience so you can build more effective marketing campaigns. They can also serve as an effective tool to generate leads and promote products.

This guide explains the different ways marketing, sales, and support teams are using phone surveys to improve their businesses. It explains how using IVR (interactive voice response) technology enables you to save time and money by automating your phone surveys, and how a technology called voice-based marketing automation (VBMA) makes it easy for marketers, sales, and support professionals to build their own inbound and outbound surveys without any help from IT.
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Phone Surveys vs. Email Surveys

Before showcasing the many use cases for phone surveys, let's briefly tackle the issue of whether to use phone surveys or email surveys. Unless you plan on surveying people manually (potentially very expensive and time consuming), automated phone surveys or email blasts that direct people to take a web survey are your best and most cost-effective options. And while both survey methods can be effective, here are three points in favor of automated phone surveys:

1. On average, people receive dozens, maybe hundreds, of emails every day but only a handful of phone calls. It's very easy for your email request to be lost in an overcrowded inbox. A ringing phone stands out and receives superior response rates compared to email.

2. With phone surveys, users can record responses with their own voice, enabling freer and more detailed responses. You can also hear the inflection and tone of an answer, giving you nuanced data you just can't get with typed text.

3. It's just easier for most people to speak a response instead of typing one out, especially if you are trying to solicit in-depth free-form answers.

Plus, as you will later see, there are some phone survey use cases that just aren't possible to do with an email request for an online survey.

“I am really so blown by the response we got on the IVR today. This blows email marketing right out of the water, results wise. My head is spinning with different ways to test this technology for other clients. I'm truly amazed.”

-Tresa N. Veitia, inktank LLC
Using IVR for Inbound and Outbound Automated Phone Surveys

Proponents of email surveys might counter these points by arguing that building a phone survey is difficult compared to email. This used to be true, back when the IVR technology needed to build a phone survey required in-depth IT programming knowledge to use.

IVR enables a caller to interact with an automated menu via telephone keypad or voice recognition. For example, enter a number on your keypad to input scores, dates, currency, and answers to multiple-choice questions. With voice recognition, the system automatically recognizes and processes spoken words in a similar manner to keypad entry. And while IVR technology used to require you to build phone surveys by writing code, this is no longer the case. Now there are IVR solutions available that are built specifically for marketers, sales, and support people to use. They are easy to use and make it simple for anyone to build complex automated phone surveys in minutes.

We will provide more on these IVR technologies later. First, let’s explore some of more popular use cases for inbound (surveys you call to take) and outbound (surveys that call you) phone surveys.

10 Questions to Ask an IVR Phone Survey Vendor

1. Can you manage and schedule outbound IVR surveys without assistance from the vendor or a developer?
2. Does the phone survey have the ability to detect whether a live person or voice mail picked up the call?
3. Can they route customers back to you during the call? To the nearest store? To an available sales agent? To your office, cell, and home phone simultaneously?
4. Are you able to record your call after a survey taker is transferred to a live agent?
5. Do you have instant access to downloadable reports?
6. Does the vendor have an on-time delivery guarantee? If survey calls go out late, you shouldn’t have to pay.
7. How much are per-minute rates and where are the hidden fees?
8. What compliance tools do you offer for FTC telemarketing standards?
9. Does the IVR technology offer a way to pause a large survey campaign mid-blast?
10. Does the technology integrate with your CRM system of other databases?
Use Case #1: For Customer Service and Support

For support professionals, phone surveys are an invaluable tool for measuring customer service. Phone surveys provide immediate feedback from customers on how your employees are performing—are they timely, professional, and knowledgeable? They help you gauge if your employees are consistently professional when they’re in front of customers and representing your business.

Below are three common phone survey scenarios for measuring customer service:

- Transfer callers to a quick survey to provide immediate feedback after speaking on the phone to a support agent or purchasing an item. This type of phone survey use case helps businesses gather timely and relevant feedback at a time when the transaction remains fresh in customers’ minds (something an email or direct mail survey can’t do).

- Alternatively, for times when a customer’s satisfaction with the help you provided or item they purchased can’t be immediately gauged, you can schedule an outbound IVR to automatically call customers after a certain period of time and ask them questions.

- You can also provide a toll-free hotline on the customer copy of your receipts or invoices, encouraging people to call and take a phone survey. Consider including an incentive such as a discount on their next purchase or a prize raffle to generate more responses.

With IVR phone surveys (see Figure 1), you can collect feedback and track responses on a daily basis. Daily feedback helps you learn the good and bad of customer experiences so you can sustain the positive and improve on the negative. It’s a great way to enhance your customers’ experience and build stronger customer loyalty.
Use Case #2: For Home and Business Delivery

Time is money in the delivery business and streamlining operations for deliveries can make a big impact on your bottom line. Using phone surveys, home delivery and logistics businesses can automate pre- and post-delivery phone surveys.

A pre-delivery phone survey can help you optimize your appointment times and prepare both parties for a smoother job. Whether a delivery requires extra tools, space for installation, or a second pair of hands, a pre-delivery phone survey can ascertain this information ahead of time and help make each delivery efficient and hassle-free.

A post-delivery phone survey helps you ensure the professionalism of your drivers and movers while in a customer’s home or office (see Figure 2). It’s a great way to find out if the driver was on time, courteous, in appropriate uniform, knowledgeable and professional. Plus, if you schedule the outbound phone survey to call the customer right after the delivery, you get a great response rate since you know they are there and available.

You can also use IVR to confirm delivery appointments. For example, have an outbound IVR call customers saying, “We are calling to confirm your delivery at 1 p.m. Press 1 to confirm or 2 to reschedule.” If the customer presses 2 they can be routed to a live agent or another IVR menu to reschedule. This type of appointment confirmation helps to reduce no-shows and eliminates the need for a live person to manually confirm appointments.

![Figure 2. Example of a post-delivery IVR survey built using DialogTech.](image-url)
Use Case #3: For Generating and Scoring Phone Leads

For marketers, phone surveys are an excellent way to capture leads. You can create campaigns that drive people to take your phone survey for the chance to win a prize. You can also configure the survey to function as an ROI calculator or conduct a needs analysis. The survey will capture their contact information and give them the option of being transferred to a sales rep.

Marketers can also use an IVR phone survey as an asset in their calls to action. For example, you can use a CTA like “Take our brief phone survey to win an iPad” in various campaigns. Again, the survey captures all their contact information and survey responses for use in future marketing campaigns, and it can give callers the option of speaking immediately to a sales rep.

Qualify Phone Leads Automatically and Gain Customer Insight

Phone surveys are ideal for automatically qualifying inbound sales calls. Marketing can configure the survey to ask callers the questions you determine work best to qualify them for that particular campaign (see Figure 3). For example, if you are using the BANT (budget, authority, need, timeline) model to qualify leads, you can pose those questions using an IVR to learn if callers are really ready to buy. Or you can ask your sales managers what questions they care about when qualifying leads, then pose those questions to callers.

Figure 3. Example of DialogTech IVR survey for qualifying and transferring inbound leads.
Leads that score high enough can be passed from the phone survey directly to sales for an immediate conversation. Others can hear a custom marketing message and be given the option of leaving a voicemail. You can also send them to a second survey if that works best for your campaign.

It’s the same principle you use when inserting qualifying questions on your web site forms. But the IVR survey results are better because leads passed to sales get connected in conversation immediately. With web leads you have to wait for a sales rep to open the lead, dial the number, and hopefully get the lead on the phone. That could take several call attempts, if it happens at all. With IVR surveys, the conversation is instantaneous, and the lead doesn’t grow cold.

Case Study: Outbound IVR Saves Go Configure Over $70,000 Per Year

Go Configure, Inc. is an outdoor products delivery and installation company with over $14 million in sales, based in Lisle, Illinois. While the company sought growth opportunities, they were constrained by staffing expenses. Go Configure saw an opportunity to increase efficiency while also reducing expenses by automating the 5 phone calls their in-house staff was making for each delivery.

Using DialogTech’s outbound IVR technology, Go Configure was able to automate phone survey calls to suppliers, drivers, and customers regarding each delivery. DialogTech provided an easy and reliable IVR service that positively impacted Go Configure’s daily business operations, saving the company over $70,000 per year.
Use Case #4: For New Product Testing and Feedback

You can use an IVR to survey customers who are testing new products in beta. Phone surveys make it easy for your customers to provide feedback – there are no forms to fill out and no paperwork to manage. All they have to do is call a toll-free phone number that you provide and complete the IVR survey. The survey can ask yes-or-no or multiple-choice questions, or the questions can be open-ended and the customer can provide answers in their own voice. It's flexible and the surveys can be easily updated to reflect new stages in your product testing.

Surveying customers in beta using IVR also makes it easy for you to receive and evaluate feedback, and then make changes accordingly. The results of the IVR survey are immediately accessible after a customer has completed the survey. This enables your team to take action to resolve issues or make adjustments as needed based on the information your customers have provided.

Case Study: Outbound IVR Helps Weed Man Save Almost $1000 Per Month

Weed Man is a network of over 250 locally owned and operated lawn care professionals across North America and the United Kingdom.

The Weed Man franchise wanted to find ways for franchisees to save money on accounts receivable and appointment reminder calls to customers.

By using DialogTech’s outbound IVR service, Weed Man Madison was able to save almost $1,000 per month, reducing 20 hours of work each week to just 2 hours.
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Use Case #5: For Market Research

Get to know your customer demographic and decode their purchasing preferences, habits, and needs with phone surveys. Phone surveys will help you learn your customers’ attitudes about your industry, your products and services, and themselves.

Market research not only helps you understand your current customers, it helps you understand your potential customers and opportunities for growth. What are their pain points? What are they looking for in a solution? What magazines do they read, TV shows do they watch, events do they attend, or web sites do they frequent? Market research can also help you to identify potential problems with your business plan, products, or services and help you track and evaluate the success of your programs.

Conducting this type of research via IVR phone survey helps you to be agile – questions can be updated and changed as needed, and results can be viewed and analyzed instantly. IVR surveying for market research is more cost-effective than hiring a team of surveyors and buying expensive equipment to conduct the research. IVR phone surveys can also give people the chance to respond anonymously, helping to improve honesty and attain accurate results.

Case Study: Roadside Protect Helps Motorists with IVRs and Toll-Free Numbers

Roadside Protect enables companies to offer their customer with assistance for flat tires, towing, car jumps, and other roadside emergencies nationwide. To do it, they need a fast way obtain unique toll-free numbers for new customers. They also need an easy and inexpensive way to validate that callers to those numbers are eligible to receive assistance.

DialogTech was able to provide Roadside Protect with access to thousands of toll-free phone numbers as well as access to real-time reports detailing call activity. Roadside Protect also use DialogTech to create custom phone survey solutions to ask callers for their validation number, which the survey processes and validates in real time.

Implementing DialogTech’s IVR solution, Roadside Protect has been able to provide faster service while cutting costs by eliminating the need to manually authenticate callers, which can cost as much as 20 times the IVR.
Use Case #6: For Political Polling

Using a IVR phone survey for political polling, you’ll see the results as they happen. As results come in, you can easily adjust your IVR questions to better target certain locations or market segments with a survey specific to their concerns.

IVR-based political polling can also be a true bargain when compared to hiring people to man your phones. This is good news because a political campaign needs to spend its funds judiciously; the cost savings of an IVR-based survey will allow your campaign to greatly expand the reach of your polls while still saving money. This greater reach will provide you with a more accurate understanding of the electorate.

You can even configure the survey to ask recipients for a donation to your campaign, and then transfer those who agree to a live operator to take their information.

Use Case #7: For Order Reminders and Reordering

If you sell products or services that require reordering or renewals, automating the reminder and reorder process with an outbound IVR survey can be a real cost-saver. Ask your customers what product or service they need to reorder, how much, the day they need it, and any other relevant questions to complete the order. Automated reordering can be used for patients needing to refill prescription drugs, for businesses needing to reorder goods and supplies, and many other needs.

Automated reorder surveys are great way to generate revenue by encouraging people to reorder over the phone. They also help save time and money by automating the otherwise manual process of calling a list of customers, taking their order, and inputting it directly into your CRM. If the call goes to voicemail, the IVR can leave a customized message or put the number back in the queue to call later.
10 Tips for IVR Phone Survey Success

When you decide you are ready to start phone surveying your target audience using IVR, here are 10 tips to help you succeed:

1. **A good IVR phone survey is short and to the point.** Less is more. Think about the most important pieces of information that you want to deliver to your customers or that you need to hear from them.

2. **Create an effective opening prompt.** Be brief, concise, and polite. Watch out for 30-second introductions or too many multi-syllabic words while making sure you appear grateful that the customer is responding to your phone survey.

3. **Have the system refer to itself as “I”.** If you decided not to record questions in your own voice, have the text-to-speech voice speak in first person. Using “I” gives the caller the feeling of a personal conversation instead of a generic answering service.

4. **Let a caller know what they can expect from the system immediately.** Customers don’t like it when they can’t see the end of the tunnel. Either have the survey share the total number of questions and which one they are currently answering, or provide some glimpse of the time it will take to complete.

5. **Take advantage of speech recognition software.** Give customers the option to traverse the survey by either using touch-tone buttons or speaking their answers. Make sure they know that speech is an option.

6. **Make speech-recognition clear.** Make it clear what the answer needs to be and use two or three syllable responses. Answers of a couple words can work well because they give the system a more precise speech target to search for.

7. **Use the same language to describe the same nouns or processes.** If you tell a customer to “enter two” at one place and to “press three” in another, you’re not being consistent. Likewise, if you call something a “menu” in one prompt, you don’t want to refer to it as a “message” later on.

8. **Think about the barge-in factor.** Barge-in is when customers have the ability to interrupt the IVR menu to skip a question or record their response before the question is finished being read. If your customers will be interacting with a phone survey in a loud place, the background noise may affect the voice recognition system, and you may not want to allow barge-in.

9. **Think about touch-tone only.** If you select this, the system won’t accept any voice responses, only numbers entered in on a touch-tone phone. While this is not ideal for surveys that want in-depth feedback, it’s another useful tool for customers who have a lot of background noise and a convenient way to simplify the phone survey.

10. **Allow access to human help.** Depending on the type of survey you are setting up, you want to keep in mind that people become frustrated, annoyed, and may eventually hang up if they cannot access human help when it becomes too confusing. You can offer customers the option to transfer to a live agent for assistance.
Build IVR Phone Surveys Quickly and Easily with Voice-Based Marketing Automation

Marketing, sales, and support teams wishing to build their own phone surveys should consider voice-based marketing automation (VBMA).

Voice-based marketing automation makes it easy for anyone to build their own inbound and outbound IVR phone surveys in minutes – no IT help needed. You can obtain clean toll-free, local, and vanity numbers to drive callers to your survey and then integrate your survey responses with your CRM system to dynamically store responses. Then, monitor the results of the phone survey online, in real-time reports. VBMA also enables you to use voice broadcasting and intelligent call routing to deliver outbound phone surveys and route survey-takers who want to talk to a live person to the right member of your team.

Obtain an Unlimited Amount of Clean Toll-Free, Local, and Vanity Numbers for Inbound Surveys

With VBMA you can purchase local, toll-free, or even vanity phone numbers to use for automated inbound phone surveys. All numbers can be activated instantly and you can be sure they are clean, meaning they won’t receive any calls from past business use not related to your survey. To ensure that phone numbers are actually clean they are aged over time and then actively monitored. Any number that is deemed dirty remains in cleansing until it stops receiving irrelevant calls.

Integrate IVR Phone Survey Responses with CRM Systems Like Salesforce.com

Using voice-based marketing automation technology you can pass survey responses and information dynamically into your CRM system, helping you streamline the process of storing survey responses. This integration helps marketing optimize campaigns and helps customer service improve support and customer satisfaction. You’ll maintain an accurate database of records and survey responses, and you can even generate survey response reports through your CRM.
View IVR Phone Survey Results in Real-Time Reports, Any Time

Voice-based marketing automation solutions let you view web-based reports that track the success of your phone surveys in real time. For each survey, you can view data on call counts, time of day, duration, caller geography, how callers answered IVR survey questions, what calls got routed to a live person, if the outbound call was answered by a person or an answering machine, and more (see Figure 4).

Personalized web-based reports help you monitor survey performance in real time. If you find that your survey isn’t going as planned, or you need to make a change immediately, you can update your IVR survey immediately based on the responses you see in your real-time reports.

If you see that callers are having a difficult time answering a certain question you can immediately remove that question from your survey and replace it with another. With real-time results, your questions are answered immediately and you can start taking action to improve your business right away.

“We have been able to reach out to customers quickly and efficiently by using DialogTech. This improved customer responsiveness has lead to increased business and marketing ROI.”

-Kevin P. Fitzgerald, iContact.com
Automated Phone Surveys and Voice Broadcasting

It's easy to send outbound phone surveys using VBMA's voice broadcasting technology. Just upload a spreadsheet with the phone numbers you wish to target, and any information you want inserted to personalize the survey (such as the person’s first name, company, product interest, or city). You can then schedule a voice broadcast that targets your entire list.

Alternatively, you can have events in your CRM automatically trigger an outbound phone survey. For example, have your CRM send a voice notification to customers one day after they receive support from your team. The voice broadcast message can be recorded in your own voice to personalize your message. Once the caller answers the phone, they’ll hear your voice broadcast message, and then be transferred to your IVR survey.

Automatically Routing Callers After Survey Completion

Once a caller has completed your survey, VBMA offers a variety of routing options:

1. **Route calls based on marketing source**: Send survey-takers to a particular agent or subset of agents based on the campaign that they responded to.

2. **Route based on the caller’s product interest**: Make sure the most knowledgeable agents are the ones who answer a caller’s questions.

3. **Route by caller’s geography**: Automatically route calls to specific agents or office locations based on the caller’s area code or zip code.

4. **Route calls between multiple call centers**: Set up multiple call centers and route call flow based on caller information, survey responses, purchase intent, distribution schedules, and location.

5. **Route calls to a voicemail box**: Send callers to a voicemail box to leave a message for your business. Messages can be transcribed and emailed to your team.

Because you have control of the phone number that your callers are using, you can route them to the right place as quickly as possible. The faster you route callers that are interested in speaking to a live person, the faster you are able to close a sale or assist a customer with an issue.
Conclusion

Phone surveys help you gain a better understanding of your target audience, generate leads, grow revenue, and improve customer service. Now, thanks to voice-based marketing automation, it’s never been easier to automate phone surveys using IVR. Businesses are using IVR surveys to measure customer satisfaction with products and services and then make meaningful improvements to fuel growth.

Next Steps

Call DialogTech today at (855) 210-3080 to learn how to build your own automated phone surveys using voice-based marketing automation. You can request a demo of DialogTech’s software at www.DialogTech.com.
About DialogTech

DialogTech, the leader in voice-based marketing automation (VBMA), manages, measures, and automates voice conversations for businesses and organizations. DialogTech’s VBMA solutions capture and manage phone leads and information that often slip through the cracks of traditional marketing automation and CRM software solutions.

The DialogTech product suite is a set of software-as-a-service applications including ad tracking, lead distribution, hosted IVR (interactive voice response), and voice broadcasting. Organizations of all sizes and across multiple industries use DialogTech, including direct response, health care, real estate, home services, and lead generation. For more information, visit www(DialogTech.com).

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