

IVR Usability Testing: Don't Go Live Without it!

By Elaine Cascio and Sue Elliott, Vanguard Communications

A recent car commercial shows a batch of children romping in a minivan, then coming out and telling adults with clipboards what they should change, add, or improve. What are they doing? Usability testing! And there's no reason why we shouldn't be just as customer focused when designing IVR applications for our callers to use.

Say that you've designed a new IVR application – or redesigned an old application that was getting unwieldy and tired. You've taken all the right steps – designed it with your customers in mind, had CSRs help script words and phrases your customers actually use and understand, and had experts help design the application. But no matter how customer focused the design, or how “state of the art” the user interface, having real users give the application a “test drive” provides critical insight into the usability of your application.

The Basics of Usability Testing

In our experience, usability testing points out flaws in menu structures and language – “I would never have looked for claims information under the policy status menu.” It also helps create more accurate wording, especially important in speech recognition applications - “I wouldn't say I am ‘reporting an outage’ – I'd say ‘my power is out.’” These are critical elements to how usable callers find your IVR application.

Ideally, usability testing is conducted with one-on-one techniques where a facilitator observes a tester performing specific exercises and gathers feedback from the tester. One-way mirrors for observers to watch and document the tests unobserved, videotaping and audiotaping can enhance the process. Here are the key steps.

Getting Ready

Begin by selecting customers for your testing – try to get a representative cross-section of your callers based on marketing and demographic data. For most large U.S. companies, this means testing in a variety of locations (for example, on east and west coasts, and in the center of the country). A facilitator can conduct six to eight tests in a day, with each test lasting 45 to 50 minutes. The number of simultaneous sessions you run depends on your needs, as well as facilities and resource availability. To accommodate workday schedules, testing can be done in the late afternoon and evening. Testers are compensated for their time.

Next, select the facilities for your testing. Most market research organizations are well-equipped for usability testing. Or you may have company facilities that are suitable for testing. Key characteristics of a good facility are a waiting area for testers, a quiet room equipped with phone jacks and outgoing phone lines where testers can perform the exercises, and preferably a separate room for observers to view the tests. All tests should be audiotaped.

Part of preparation is designing exercises for the testers. Start with some simple tasks (“check the balance on your checking account”) and work up to more complex tasks (“transfer \$100 from savings to checking”). Create realistic scenarios, and use simple language in your explanations; tell testers what they need to achieve but not how to do it. Design a guide for the facilitator, too, to guide them through each exercise.

Conducting the Usability Tests

Once you've got your tester in the room, exercises are conducted using a phone to dial into the application. The facilitator is in the room with the tester, and his role is to observe the tester, noting any areas of hesitation or frustration, which can be probed at the end of the exercise ("I noticed you hesitated before selecting the account information option – why was that?").

Observers are in another room behind a one-way mirror. Their job is to observe and take notes on the test. Observers should be positioned to see the tester's face (for hesitation, confusion, etc.) and the phone keypad (to record the selection made when using touch tone) simultaneously. A speakerphone is essential so that facilitator and observers can hear what the user is experiencing too.

At the end of each exercise, the facilitator asks questions to understand how easy it was to complete the exercise, and how the application could be improved, such as:

- How does this application compare with others you use regularly?
- What did you like? Dislike?
- Would you use the application to obtain information or perform transactions? If not, what would make it something you'd use?

The observer(s) and facilitator regroup after each test to make sure the facilitator covers all questions the observers have and to check that the approach is working. If you start to see strong patterns, you may want to do some tweaking. For example, if one menu is clearly confusing users and they provide consistent feedback on how they'd like it structured, you may want to redesign and test a new menu based on these results. Testing is an iterative process, so make sure you have programmers and voice talent standing by to make changes as needed.

Analyze Patterns and Make Improvements

Meet and discuss usability testing findings with your IVR team. Use observer and facilitator notes as well as audiotapes and videotapes to identify patterns among testers. Concentrate on the areas where large numbers of testers had recommendations for improvement or experienced problems, rather than one or two strongly expressed opinions. Look for ways to improve wording, scripting, or callflow. Some recommendations may require that you change your IVR design, others may point to specific details and instructions to include in your communications to users. Decide what changes to make before going live with your application. If changes are significant, we recommend repeating usability testing, or at least piloting the application with a small control group.

The Benefits of Usability Testing

Some companies claim that usability testing is expensive and time consuming – but the costs of not doing usability testing are great, and can include sub-optimized and inferior applications, lower customer satisfaction, and potentially lost business. And, there is a real bottom line impact. On average, a call completed within the IVR saves four to five dollars over a CSR-handled call. So a small, two percent improvement in completion rate in a center that handles a million calls per year means an annual savings of \$80,000 to \$100,000.

Keep in mind that customers tend to give up on self service after two or three unsuccessful tries, so you have a limited time to get your application "right." In the best case, a customer who doesn't like your new IVR application remains your customer but is more expensive to serve than they could be. In the worst case, customers dissatisfied and frustrated by the IVR may leave for the competition. Usability testing is one way to make sure that callers to your IVR will be successful the *first time*.

Elaine Cascio is a Vice President at Vanguard Communications Corporation, and heads Vanguard's self service practice. Sue Elliott heads Vanguard's Asia Pacific office, concentrating on call center process development, electronic commerce and self-service strategy and design. Vanguard is an independent consulting company specializing in customer contact and convergence.