

IVR Planning Framework

What is the IVR's persona?

As the voice of a business, the IVR system should align with the brand's core values. Better yet, the IVR persona should be an extension of the other communication channels and not a one-off experience. Whether a customer direct messages, reads the website, or phones the call center, the brand persona should be consistent.

Who is your audience?

This audience segmentation could involve specific locations, age demographics, languages, and any other audience variable that can help shape the experience to be personal.

What are the tasks and use cases?

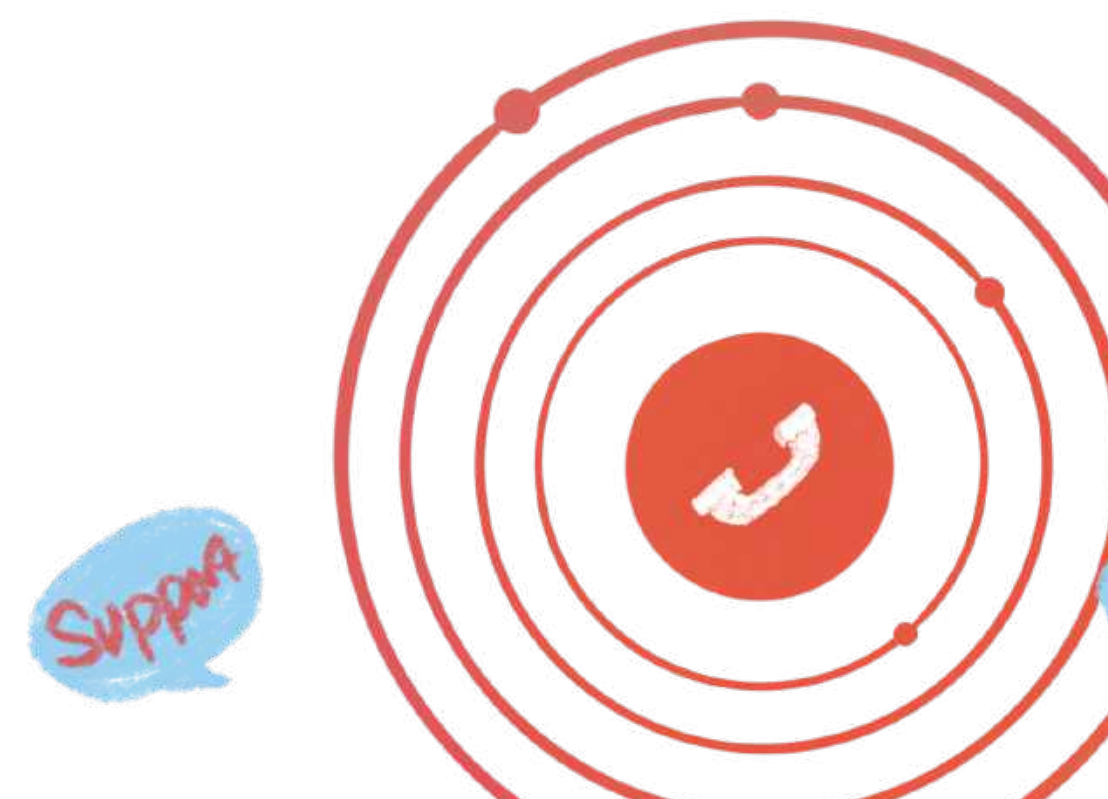
Determine the tasks that can be requested and resolved. A local veterinarian clinic might only need to answer store hours, schedule an appointment, and re-order medications. Whereas, a national home improvement store's IVR experience would need to be much more robust based on audience size, number of locations, online order fulfillment, and more.

What flows do you need?

A designer maps out the various flows or potential paths the IVR conversation can take. The design team for a home improvement brand, in this case, would set flows for store locator, order status, and order returns.

How will use authentication criteria?

Decide authentication criteria - data requests that give context to the call and provide smart sequences for the conversation (i.e. a caller's Member ID, zip code, phone number, or order number).



IVR Planning Framework (fillable)

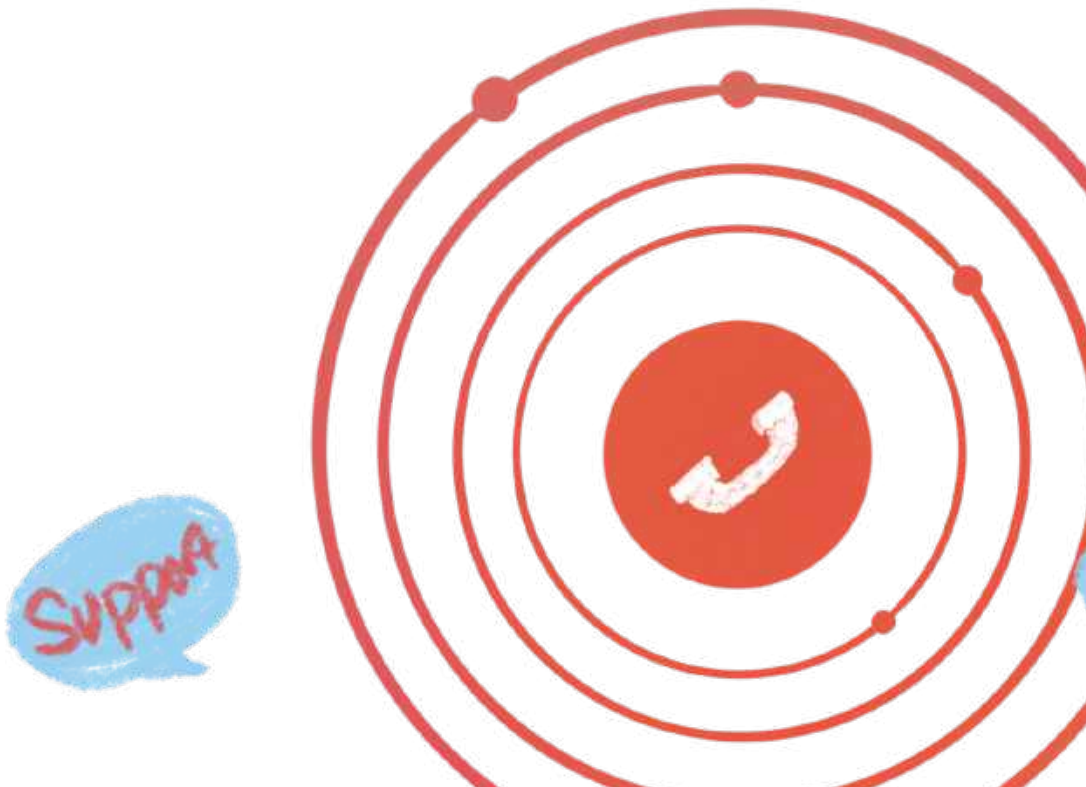
What is the IVR’s persona?

Who is your audience?

What are the tasks and use cases?

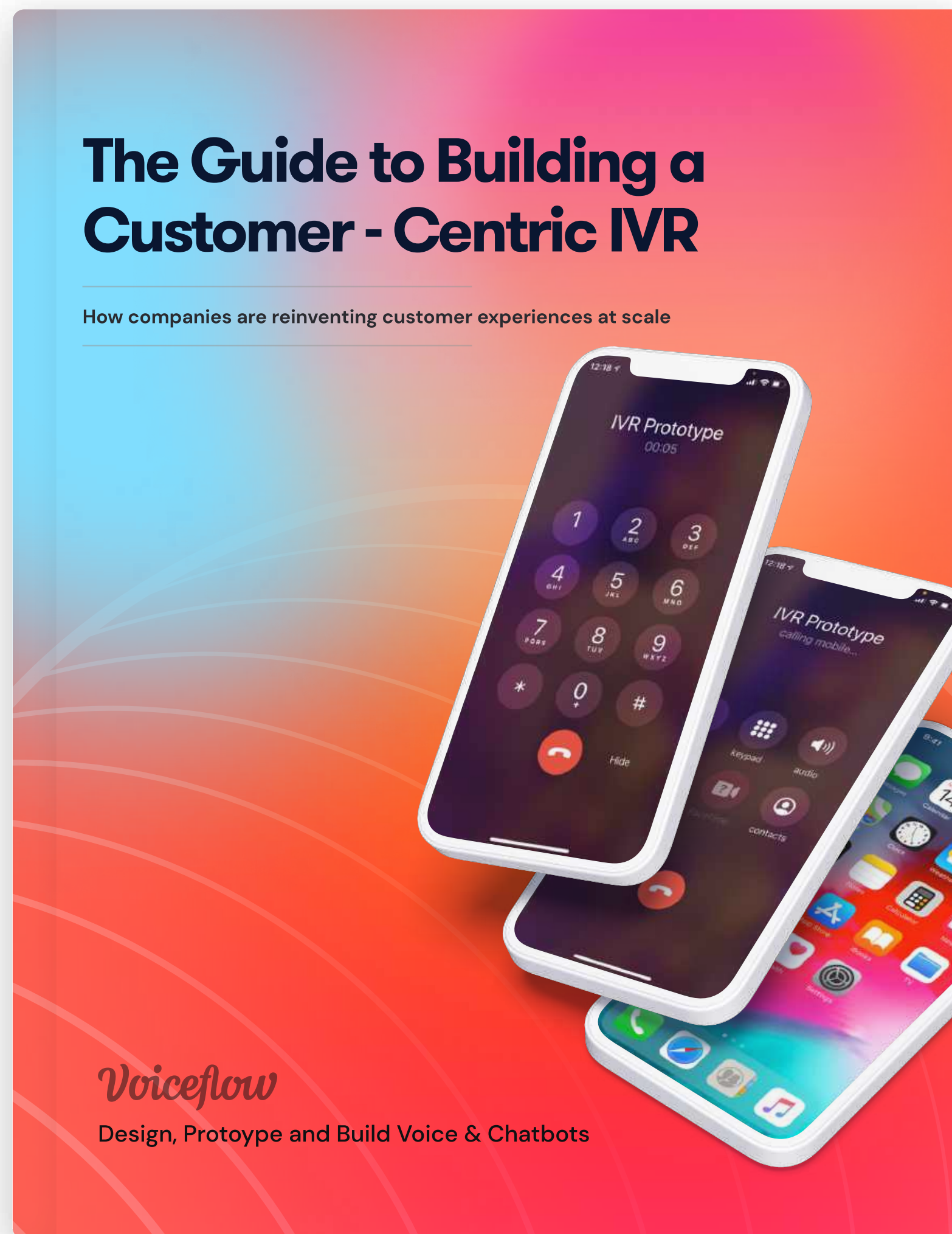
What flows do you need?

How will use authentication criteria?



For more, check out

The Guide to Building a Customer - Centric IVR



share.voiceflow.com/guide-to-IVR