

IVA Integration Essentials

WHERE AUTOMATION TRANSFORMS INTO ACTION



When it comes to automated customer service, solutions that can only “answer” and not “act” are quickly becoming relics of the past. Intelligent Virtual Assistants (IVA) that focus on action mean the difference between helping a customer quickly address their issue versus sending them to another place (the website, a live agent, a store) to resolve their inquiry.

IVAs THAT “ANSWER”	IVAs THAT “ACT”
Share an upcoming bill due date and amount	Process the payment and set up autopayments
Transfer the customer to a live agent to set an appointment	Set or change an appointment
Provide information on how to process a return	Process returns
Offer a list of local stores and opening hours	Check the inventory of local stores for a particular product





This problem often hides in plain sight: Calls and chats seem contained by automation, but the customer's intent wasn't actually resolved and their customer service journey frustratingly continues

To move from an IVA that just shares information for limited self-service functionality to one that can truly perform higher-level tasks, you need expertly implemented integrations between your IVA and your key systems.

A well-integrated IVA enables companies to deliver the next-level automated service that today's customers expect:



PERSONALIZATION

Identifying the caller by phone number, removing the need to find and state an account number or identify themselves in some way



PREDICTIVE PROMPTS

Asking about a relevant transaction or item, such as the most recent order, an upcoming appointment, or a near-due bill



SELF-SERVICE TRANSACTIONS

Completing more complex intents without escalation, such as setting, rescheduling, or canceling an appointment; taking a payment; processing a refund; or collecting information for a claim or new account



INFORMATION SHARING

Ensuring live agents have the information the caller has already shared so they do not have to repeat themselves



RICHER ANALYTICS

Enabling the sharing of IVA data with contact center software data, CRM data, and other sources to more deeply analyze customer interactions and uncover points of friction throughout the customer journey

Well-crafted and maintained integrations can also bring valuable efficiencies to your internal processes and agent jobs. It can help tighten up processes around PII, such as by transferring customers to the IVA for automated payment processing rather than having a live call or chat agent accept payment information. Also, connecting current systems to your IVA can help you get more use out of and drive more value from the technologies you already have.



62% of consumers expect companies to understand their needs as they change¹

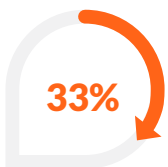
Finally, well-thought-out integrations can power innovative AI uses that can streamline and uplevel contact center work. An IVA with the ability to output instant transcriptions for both IVA and live agent interactions can be used to generate call summaries, suggest social and chat responses, offer on-the-fly script suggestions, and fuel conversational search that can help agents during calls.



40% Top customer frustrations include disconnected experiences,



being asked questions they've answered before,



and being offered irrelevant products.²

However, integration challenges often arise for companies. Off-the-shelf solutions may offer limited assistance with setting up and maintaining integrations. Organizations with stretched-thin IT teams, unique legacy systems, particularly complex environments, or software solutions that fall outside of typically supported integrations face large roadblocks that prevent the company from realizing the full value of their investment.

¹Salesforce, [2023 State of Connected Customer](#)

²Salesforce, "[Personalization, Data Security, and Speed Drive Loyalty Amid Uncertainty—Salesforce Research](#)," January 19, 2023



Building a smarter IVA: The integrations that matter most

Before we address how to knock down these roadblocks, let's look at the integrations that a robust IVA solution should support in order to automate more tasks, offer more personalization, and provide customers with a more effortless experience. Use this list to inform conversations with potential IVA providers to ensure that you're getting the most from your solution.

Channel platforms (telephony, chat, social, SMS)

This is a foundational integration that connects your IVA with your communication infrastructure, enabling the IVA to conduct conversations with customers on the telephone, your chat platform, SMS, or social channels like Facebook and X.

Contact center software

An integration with your contact center software allows seamless connectivity between IVA calls and those that are sent to agents, including providing the intent and other information from the IVA call so that the customer never has to repeat themselves. It also supports analytics that can trace each customer's interaction across channels and can inform intent/dialog updates for the IVA or other measures to improve the customer experience.

Customer Relationship Management (CRM)

Most IVAs support streamlined integration with key CRM providers like Salesforce, Hubspot, and Microsoft Dynamics 365, as they're critical for the data exchange that fuels personalization. With CRM information, an IVA can identify the caller, bring up relevant information (such as recent or favorite orders or the caller's address), and even cross-sell opportunities.



Payment processing

As customers discover how easy it is to quickly pay bills with an IVA connected to a payment processing system, some choose to use that method vs. paying online or by check. (Analytics from Interactions that often show repeat calls every ~30 days bear this out.) IVA payment automation can also tighten data security controls by enabling customers to enter payment information via an IVA interaction rather than with a live agent.

Appointment scheduling

An IVA can provide a simple way for customers, patients, and clients across industries to set, cancel, and reschedule appointments without having to wait in a queue. Easing this interaction can minimize no-shows and the IVA can even gather information from the caller to add context to the appointment—such as, for example, the car they plan on servicing at a dealership, the address where they need a utility shut-off, or a device that needs repairing at a mobile communications store.

Inventory management

Integration with inventory management systems allow callers to check if a product is in stock at a local store or warehouse, estimate shipping times, and support cross-sell opportunities. It can also assist the IVA with conducting an exchange (with set business rules).

IT service management/help desk ticketing

Similar to CRM integration, connecting your IVA with an IT service management system can personalize and ease help calls. It can help the IVA know the caller's device, open tickets, or past issues, as well as track the current call by opening a new ticket or adding the interaction to a current ticket.

Analytics and reporting

To bring together analytics from across the customer lifecycle, companies often integrate their IVA's analytics and data into their own business intelligence and data visualization software, such as Tableau or Google BigQuery.

Industry-specific integrations

While these are the most common use cases, there are often integration points with industry-specific solutions, such as an electronic health records (EHR) system, a core banking system, a utility-specific CRM, or an insurance policy administration system (PAS).





The path: How to build stronger IVA integrations

Achieving a well-crafted integration can make all the difference between an IVA that simply functions and one that delivers exceptional, seamless interactions while bringing more efficiency to your contact center. But given the challenges mentioned earlier, how can your organization ensure it realizes this extended IVA value?

The key to a well-integrated IVA rests, in great part, with your choice of IVA partner. Ask yourself these questions as you research your options.

1. What are the key systems we would like to integrate?

Having a list of these systems will help you evaluate if the vendors have engineered streamlined integration points or if your needs will be considered more bespoke.

2. How much assistance will our IT team require?

Are you well-staffed with API integration experts on staff or will you need a good amount of help from the vendor?

3. Does the company offer API-first integrations—and how long has it been doing so?

Look for a partner that prioritizes API integrations and has deep experience with them, rather than adding them as an afterthought.

4. Does the vendor ever say “no” to an integration request? If you have specific needs, such as integrating with less commonly used systems or DIY-built technologies, can the vendor still help with integrations or will you be on your own?

5. What does the implementation service agreement entail? Consider the amount of hours of help you will receive and what will happen if you need additional hours or have more complex needs.

6. What ongoing support does the vendor offer? If you implement new back-end systems in the future or have an issue with an API, will the company offer support or just a forum for DIY solutions from other users?

7. Does the IVA vendor have a vested interest in your success with its solution? Companies that charge a consumption- or subscription-based rate won't feel a difference if your IVA is performing at a percentage of its potential value because it lacks the proper integrations, but your company will.

Adding the human touch – invisibly and seamlessly

With any IVA, there may still be tasks that require human intervention. A business may rely on fragile legacy technology or have a very complex environment that is challenging to integrate with the IVA. Or an organization may have business rules and internal AI protocols that require a human decision, such as a refund over a certain amount.

Typically when more complex requests arise, an IVA escalates the interaction to a human agent. Interactions has engineered an invisible and elegant solution, Workflow Orchestration, that keeps customers engaged with the Interactions IVA while chat agents complete these subtasks in the background. The company is able to optimize containment, while customers enjoy lower effort and less frustration. And because the IVA only brings in human agents at exactly the moment they are needed, agent handle time (AHT) can be reduced up to 50-70 percent.

Essentially, Workflow Orchestration turns voice into a digital channel, providing a streamlined interface that empowers chat agents of varying experience to support customers across all channels and in multiple languages.



Integrations IVA: Designed and incentivized for customer success

At Interactions, our teams are on hand to help build the integration points customers need, whether they're at the beginning of their engagement or if they've been our customers for years. We abide by the belief that customers deserve better — both our customers and yours — and practice what we preach with success-based pricing.

Interactions customers only pay for the IVA transactions that are successful, with “success” defined by Interactions and our customers to ensure it meets your goals. This means we do everything to help you broaden the tasks that can be automated through integrations and human assistance, the intents the IVA can understand, and the happiness of your customers. By only charging for success, we're ensuring the satisfaction of our clients, which is why we have a 99% retention rate.

To learn more about the combination of AI, automation, and humans that help our clients bring effortless interactions to their customers, [visit our website](#).





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ABOUT INTERACTIONS

Interactions provides Intelligent Virtual Assistants that seamlessly assimilate Conversational AI and human understanding to enable businesses to engage with their customers in highly productive and satisfying conversations. With flexible products and solutions designed to meet the growing demand for unified, omnichannel customer care, Interactions is delivering unprecedented improvements in the customer experience and significant cost savings for some of the largest brands in the world. Founded in 2004, Interactions is headquartered in Franklin, Massachusetts with additional offices worldwide.

For more information about Interactions, contact us:

866.637.9049

[interactions.com](https://www.interactions.com)