

# INTERACTIVE INTELLIGENCE



## Multi-channel IVR Increases Operating Efficiencies; Helps Outsourced Contact Center Offer Superior Customer Service to Insurance Clients

CASE STUDY

**“We could’ve gone with a traditional IVR vendor but chose Interactive Intelligence because the company offered us a migration path**

that would enable us to change our switching network, data protocols and other IT systems without losing our investment in IVR application development. The Interactive Intelligence IVR also offered us a simple drag-and-drop customization tool so that even our non-developers could quickly and easily create new applications as clients required them. We ended up realizing more than \$1 million in savings resulting from the use of software by Interactive Intelligence. This was more than we had ever expected and has helped us to provide more competitive service offerings to our insurance clients.”

—Matt Jones, Director of Technology Services for Ci Direct  
February 20, 2002



### ABOUT CI DIRECT

Ci Direct is an outsourced contact center that provides inbound and outbound customer service and support to the insurance industry. Ci Direct’s expertise includes customer acquisition and retention, lead generation, new product introduction and account maintenance. Ci Direct was founded in 1998 and is headquartered in Harlan, Iowa.

### PROBLEM

Ci Direct maintained two contact centers in Harlan, IA to support insurance clients across the country. A critical part of Ci Direct’s contact center services was its interactive voice response feature that enabled client customers to select options for particular types of insurance, access account information, or be connected with a live agent. Ci Direct was using a proprietary IVR that became increasingly unstable and difficult to customize as the company’s client base grew and service requirements became more complex.

Ci Direct needed a new system that offered a more easily customizable IVR, in addition to sophisticated contact center applications, such as multimedia routing, Internet text chat and fax-on-demand. In addition, the company was looking for a scalable solution that could flexibly support its 90-station and 25-station centers respectively, each with call volumes that varied considerably depending on client need.

Ultimately, Ci Direct hoped to improve customer service and increase operating efficiencies with a new IVR system that would help them automate services, reduce customization time and simplify the administration process.



With its multiple interface points and system flexibility, CIC gives you much more than traditional IVR systems.

## SOLUTION

Ci Direct reviewed products from Nortel and other traditional telecommunications vendors, but chose an "all-in-one" software-based system called *Customer Interaction Center™* (CIC) from Interactive Intelligence. CIC offered a variety of interaction management applications, in addition to a multi-channel IVR with a built-in customization tool that would enable Ci Direct to quickly and easily create scripts of virtually unlimited complexity with no arbitrary limits on the number or depth of menus, as well as the ability to be applied across communication channels. In addition, CIC was based on a single, "all-in-one" platform designed to reduce the number of devices required by traditional telecom and computer telephony integration solutions. CIC also ran on an open architecture for easy integration with existing IT and telecom systems.

In October 1998, Ci Direct installed its first CIC system at its main site, complete with IVR, auto attendant, voice mail, automatic call distributor, unified messaging, fax services, Internet text chat, reporting, recording and screen pop integrated with customized CRM applications. The second CIC system was installed in May 1999 at the company's smaller contact center.

Ci Direct integrated CIC's IVR with a client's existing S/390 mainframe using scrapes to give end-users, agents and others information based on caller type. Queries based on loan or policy number enabled CIC's IVR to play back loan information such as payoff amounts, automatically update end-user addresses and phone numbers, and perform auto transfers to eight different lending institutions across the U.S. based on customized IVR criteria.

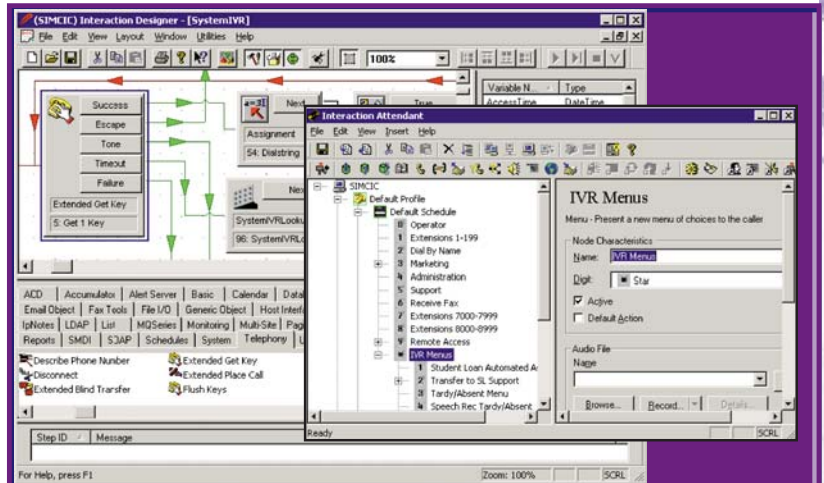
Ci Direct used CIC's graphical application generator, called *Interaction Designer™*, to offer clients a variety of tailored options, such as letting clients choose whether they wanted customers to receive live-only agent interactions, or a mix of automated IVR and live agent service. The application was also configured to transfer calls to remote agents working from home.

## BENEFITS

Today, Ci Direct uses CIC's IVR to support approximately 130 agents processing, on average, 10,000 inbound and outbound interactions per day. The company cites a twenty-four percent reduction in live agent call handling—that's a twenty-four percent increase in capacity—resulting from the new system's ability to effectively match IVR criteria with the appropriate routing destination. When this percentage is calculated based on agent cost, the company cites a savings of approximately \$1.4 million in 2001 alone.

Ci Direct's new IVR system also provides client customers with convenient 24-hour service and a combined "whisper" and screen pop feature that gives agents customer information before receiving a call. This feature has significantly improved customer satisfaction, as well as agent productivity.

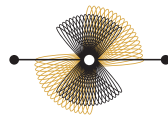
Ci Direct will incorporate a new mainframe into its communications infrastructure this year, when the company expects to recoup additional benefits from its new system by virtue of CIC's open architecture designed for easy integration. In addition, the company is migrating to higher density Aculab voice boards—a unique option made possible by CIC's platform-independent architecture—to support even larger call volumes for increased revenue opportunities. Ci Direct credits this architectural feature with giving the company unparalleled investment protection.



**Interaction Designer and Interaction Attendant for easy customization and administration**

## ABOUT INTERACTIVE INTELLIGENCE INC.

Interactive Intelligence Inc. (Nasdaq: ININ) is a global developer of multi-channel interaction management software designed to give contact centers, enterprises and service providers a flexible and affordable alternative to traditional telecommunications solutions. The company was founded in 1994 and has a worldwide customer base of more than 900 companies. Interactive Intelligence has won numerous awards, including Software Magazine's 2000 Top 500 Global Software and Services Companies and Frost & Sullivan's 2001 Entrepreneurial Company of the Year.



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