



Contact Center Intelligent Virtual Assistant (IVA) Automation Checklist

It is crucial to equip your Intelligent Virtual Assistant (IVA) with the necessary capabilities to deliver a streamlined, efficient customer experience. Here is a list of key functions your IVA should be able to automate to accomplish that goal.



Greeting and Data Collection

- Verify customer identity and authenticate callers.
- Personalize greeting using the customer's name.
- Offer language selection and support for multilingual customers.
- Provide answers to frequently asked questions.
- Update customer account information.
- Assist with password and security question resets.
- Allow customers to report issues.
- Update customer preferences and account information.
- Initiate automatic callback option if wait times are long.
- Escalate to a live agent when necessary.
- Collect customer feedback or survey responses.
- Use customer history to tailor interactions.



Payments and Account Information

- Securely process customer payments.
- Negotiate payment terms, payment deferral requests, and credit extensions.
- Retrieve account balance information.
- Assist with account creation and registration.
- Retrieve account numbers and other identifiers.
- Confirm recent transactions.
- Send account statements or transaction histories.
- Enroll customers in autopay or payment plans.
- Update payment method (credit card, bank account, etc.).
- Update billing and shipping addresses.
- Offer promotions or discounts based on eligibility.
- Retrieve and send payment history.
- Handle billing inquiries and disputes.
- Process refunds or account credits.
- Notify customers of upcoming payments or account change.



Complex Transactions

- Initiate outbound communications to customers.
- Schedule, reschedule, or cancel appointments.
- Check status of services or orders (e.g., utility provider outage).
- Manage customer enrollment in programs or services.
- Activate new services for customers.
- Assist with product or service setup.
- Facilitate service upgrades or downgrades.
- Manage subscriptions and renewals.
- Handle complaints or disputes.
- Process returns or exchanges.
- Track and provide updates on orders or shipments.
- Submit warranty claims or support tickets.
- Understand customer intent and route to appropriate department or agent.
- Provide product or service documentation (manuals, FAQs, etc.).
- Cross-sell or upsell relevant products or services based on customer history.

Calculate how an Intelligent Virtual Assistant can save valuable call minutes.

[INTERACTIONS.COM/IVA-CALCULATOR](https://interactions.com/iva-calculator)