



RightNow ® Technologies Best Practices Implementation Guide

RightNow Technologies, Inc. ®

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<http://rightnow.custhelp.com>

Welcome

Welcome to the RightNow Technologies Best Practice Implementation Guide. This document is designed to help companies successfully deploy RightNow Service™. The guide highlights the RightNow Technologies LifeCycle Solutions Methodology™ as well as summarizes recommended best practices gleaned from over 1,000 RightNow Implementations and Tune-Ups of both large and small companies.

LifeCycle Solutions Methodology™

RightNow Technologies understands that successful implementations are a continuing process—not a single event. Only through careful alignment of strategy, process, design, technology, and people are business objectives achieved. Using a proven phased LifeCycle approach, the RightNow Professional Services team combines project management with both technical and business-focused consulting services. Unlike other vendors who focus only on short-term results, RightNow can address your immediate needs while evolving your solution over its lifetime. The result: a scaleable customer service solution that allows you to improve CSR efficiencies and customer response times, increase customer satisfaction, streamline contact center operations, improve business procedures and realize rapid Return On Investment (ROI) results.

RightNow Technologies' LifeCycle Solutions Methodology™ is a four-phase process applicable to projects of any scale and scope. The *Discovery*, *Go Live*, *Adoption* and *Evolution* phases are designed to guide you to a successful implementation of RightNow Service.



Discovery Phase- RightNow's consulting experts help you determine strategic business objectives, align your needs with solutions, and establish specific measures and baselines for your operating standards.

Go Live Phase- a Project Plan including success factors and risks is developed. A rapid deployment path leads to a fully configured site that achieves desired business objectives.

Adoption Phase- With RightNow Best Practices to guide you, a Project Manager utilizes a remote Tune-Up to revisit your objectives and determine enhancements that achieve increased user adoption, feature utilization and optimum staff skill levels.

Evolution Phase- A comprehensive Optimization Program helps to assess and improve the applications, business processes, user adoption/effectiveness and technical support.

Best Practices Scorecard

RightNow Technologies offers a Best Practices Scorecard to measure each client's Implementation and use of Best Practices throughout the LifeCycle of their project. A scorecard is completed upon Go-Live, and updated during each subsequent Tune-Up or Optimization Audit.

The goal is to get as close to the allotted 100 points over the LifeCycle of the project. Details of the scorecard recommendations are outlined in the following pages.

To access your scorecard, log into <http://rightnow.custhelp.com>. Click on 'My Stuff', then click on 'CSI: Best Practice Scorecard'.

The screenshot displays the 'Best Practice Scorecards' page for 'Interface #1'. The page includes a navigation menu with 'Support' highlighted. The main content is a table with the following structure:

Interface	Scorecard for Interface: Interface #1							
	Measurable	Goal	Baseline	Go Live	30 Day Eval	60 Day Tuneup	90 Day Eval	Tuneup
Interface #1	There are no goals set for this company/interface yet.							
Interface #2								
Interface #3								
Interface #4								
	Subtask							Total
	Project Team							
	A Project Sponsor is a Member of the Team							1
	A Project Manager is a Member of the Team							1
	A RightNow Administrator is a Member of the Team							2
	A Knowledge Base Engineer is a Member of the Team							1
	Subtotal							5
	Project Planning							
	Accurate Goals, Success Criteria and Risks Defined							3
	Baseline Numbers Gathered							3
	Business Process Flow Charting, Content Planning Completed							2
	Web Site and Service Audit Completed							2
	Subtotal							10
	Project Software on Current Release							
	The RightNow Software is on the Current Major Release							5
	Subtotal							5
	Funnel Through Self-help							
	Phone Numbers Used Appropriately							5
	One Click Access to Self-help Support Site							5
	Intuitive Entry Label for Support Site							3
	Static Faqs Removed from the Web Site							3
	All Info in the Support Site for One Stop Access							3
	Support Site Available from Every Web Page							1
	Product Specific Links to Site Created (when Appropriate)							1

At the bottom of the table, there is a link: [Return to My Stuff](#). The footer contains copyright information: Copyright 2003 RightNow Technologies, Inc., a Privacy Statement link, and an email address: HMS Comments to upgrades@rightnow.com.

1. Team Alignment

To succeed in your RightNow Service Implementation, it is critical that the right people are involved in the project. Although the makeup of your team may vary based on your project goals, we recommend the following roles be included:

- **Project Sponsor:** The Project Sponsor's role is to communicate company objectives, project goals, deliverables and budget to the project team. The Project Sponsor should be an executive level team member with the power to enforce changes.
 - **Project Manager:** The Project Manager's job is to work closely with the RightNow Project Manager to develop a project schedule and coordinate all resources to ensure the project is successful.
 - **RightNow Application Owner:** The owner of the RightNow application is responsible for gathering and entering data for the system configuration. This contact will be highly trained on RightNow products and will be the long-term owner of the application.
 - **Back-Up RightNow Application Owner:** The back-up RightNow Application Owner will be able to perform the same administrative functions as the Application Owner and will fill in when the Application Owner is unavailable.
 - **Content Owner(s)/Publisher(s):** This may be one team member or multiple team members depending on the Implementation. The Content Owner(s) will be responsible for gathering content for the knowledge base that applies to their specific division or business unit. Content may include staff names and contact information, product and category suggestions, FAQ content and reporting needs. This team member(s) may also take on the responsibility for publishing new FAQ content within the knowledge base and keeping the existing content updated.
 - **Marketing:** The Marketing resource is typically charged with determining the appropriate link placement for the RightNow site and coordinating changes with the Project Manager. This person is also in charge of promoting the release of RightNow Service to both external and internal customers.
 - **Webmaster:** The Webmaster customizes the site design and creates the link to RightNow Service for project launch.
 - **Trainer:** The designated trainer will be responsible for providing agent training prior to and after go-live.
 - **Mail Administrator:** (If implementing a non-hosted solution or special mail routing needs are identified): Completes all mail related task associated with the RightNow Service.
 - **DBA:** (If implementing a non-hosted solution): Assists with the RightNow Service Installation.
 - **System Administrator:** (If implementing a non-hosted solution): Addresses technical issues associated with RightNow Service installation.
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2. Plan the Project

Project Planning is a critical first step.

Begin by establishing a Project Plan including firm project goals, success criteria, deliverables, risks, and a project schedule. Consider company policies, resources, and culture when establishing a project plan. The time spent planning the project will save you time when the configuration of the software actually begins. Your RightNow Technologies Project Manager will work with you to create a Project Plan for your company.

Gather the appropriate data before you begin your configuration.

Before you begin the actual configuration of the site, identify and gather the appropriate data that will be populated into your RightNow database including staff information, products, categories, and your initial Public Answers.

Process Planning.

Additional planning activities include a Web Site Audit to review content currently on your company's web site. The audit is looking for access deterrents (phone numbers, email addresses) that will prevent users from serving themselves, and should therefore be removed or hidden. In addition, look for strategic placement of links into RightNow Service. It is recommended that RightNow Service be one click from your home page for easy access and increased usage.

Business process charting is an important planning exercise. As a team, document your current processes for handling inquiries and identify current pain points. This information is used to configure business rules and more in RightNow Service.

3. Current Major Release

We encourage all RightNow customers to always be on the latest major release. This will ensure that you are getting the best return on your investment with RightNow products. Upgrades can be scheduled on <http://rightnow.custhelp.com> in the *My Stuff* area.

4. Funnel Through Self-Help

Use support phone numbers appropriately on your web site.

Do not hide the site behind 800 numbers and email addresses on your web site. Remove the 800 numbers and email addresses from your web site and publish your help/service link to the self-help knowledge base. If you have to publish your support phone number, place it within an Answer in the knowledge base. If you must have a support phone number posted on your main web site pages, make sure that it is labeled appropriately and the expectation for the type of phone service is set correctly. Another option is to use the *Call Back* feature in RightNow Live™ so that your customers will still visit the support site and can still contact you by phone.

Create an intuitive entry link to your RightNow site that is one click away from your Web site's home page.

In order for your customers to use the site, it has to be easy for them to find on your web site and labeled appropriately (examples of intuitive entry labels include "Customer Care" and "Customer Service"). Make the link to RightNow Service a dominant link on your homepage. Also make sure that your site is available on every page of your web site.

5. Centralize Inbound Requests

Route all incoming requests into the Support site.

Create one central location for your support staff to answer all incoming requests from your customers. Direct existing email links to the RightNow Service *Ask A Question* page or use *Email Gateway* to bring the free form email into the support site.

Allow customers to update their incidents through the site.

Allowing customers to update incidents through the *My Stuff* area eliminates most of the need for the "merging" or "relating" of multiple incidents together and reduces the likelihood that a customer will submit multiple issues. Some email management systems relate all emails together under a single reference number. However, the design of RightNow Service uses the threading concept to eliminate this need. Emails that come in as updates to a RightNow Service incident update the original instead of creating a new ticket. If customers are seeing updates creating new tickets, ensure the MYQ_REOPEN_DEADLINE setting is set to a reasonably high number.

6. Business Rules

Use SmartAssistant™ in your Business Rules.

In your configuration, set up a business rule to suggest SmartAssistant Suggested Solutions to end-users that is restricted by Product and/or Category. This will enable your organization to reduce the amount of incoming requests and increase self-help rates.

Automate Email Gateway requests with Standard Responses in your Business Rules.

Email Standard Responses will reduce the number of support requests that your staff will handle and will get customers quick and accurate responses. This is also a great opportunity to tell your email users that there is a knowledge base available on your web site.

Set up automatic incident assignment using Business Rules.

Automatic assignment will entail quick incident responses by the staff member with the appropriate knowledge. Setting up queues with specific pull policies will also increase efficiency.

Set up a "catch all" Business Rule.

This rule will ensure no incidents are lost within your system and that customers receive a timely response.

Use Service Level Agreements

Service Level Agreements (SLAs) enable you to track the effectiveness of your customer service, and determine whether agents are meeting service goals.

7. Standardize Site Design

Make the look and feel of your RightNow site match your company's web site.

This is a critical step to branding the RightNow site for your end-users. Change message bases within the RightNow Service site for consistent terminology within your company, and ensure that the link to the RightNow support site is intuitive and accessible from all areas of the web site.

8. Staff Efficiency Features

Configure Standard Responses, Incident Custom Fields, Time Billed, Queues, and appropriate Views and Profile to increase staff efficiency within the RightNow Service site.

Use Standard Responses in your Incident Console and Business Rules.

Standard Responses will enable quick, consistent and up-to-date responses from your staff. Standard Responses may also be used in Business rules to auto-respond to end-users. If you have a support model that requires escalation from one group to another, create Standard Response templates to make sure the group receiving the issue has all the information that they need to work the issue.

Use the Links pull down.

Use the *Links* pull down on the Administrative side of the RightNow Service software to allow quick access to other training or troubleshooting tools that are available to your support staff. In fact, it is possible to use the Links menu to engage the email client by using the "mailto" functionality. Simply enter the following two lines into the Links pull down setting:

The text that you want to display
mailto:address@domain.com

Configure a Custom Tab.

Utilize the custom tab functionality (version 6.0 and greater) to consolidate information for agents. RightNow Service allows you to add custom tabs to the tabbed panel on the Support and Answer Consoles. Custom tabs can integrate RightNow Service with other Web-based software and display commonly used Web sites. Using custom tabs can further reduce the number of page turns required by agents, allowing them to resolve more end-user issues.

9. Knowledge Base Management

Make sure that your Product and Category organization of Answers is easy to understand.

Put yourself in your customers' shoes and make sure that the organization is intuitive and simple. It is also best to ensure that you have at least one Answer that is returned if the end-user selects any combination of product and category.

Let your customers control and determine the content of your knowledge base.

As your customers begin to use your knowledge base and submit questions, use proposed incidents and the System-defined reports to drive additional content on the *Find Answers* page. Start out using the data in the *Keyword Searches* and *System Summary* reports to maintain your knowledge base.

Configure your Search Page appropriately for enhanced end-user usability.

There are two things that are crucial to the success of your search page for end-user usability. The first is to keep the Answer subject lines simple and intuitive for the end-user. Also ensure that the entire subject line displays on the search page. Furthermore, keep the view of the search page simple. The simplest search page view is to display one column with the subject line.

10. Customer Satisfaction

Use RightNow Metrics™ Closed-Incident or On-Demand surveys.

To ensure that your support processes and site are truly satisfying your customers, measure their satisfaction using surveys in RightNow Metrics™.

11. Promote Service

Change telephone Hold Messages to point people to the web.

Promote the RightNow site and inform/re-train your customers to find their own Answers quickly.

Create an Answer that explains how to use the support site.

Create an Answer that describes to users the best way to use your support site. This Answer should be fixed at the top or linked from the Support Home Page with your initial release.

Update Marketing collateral.

Update Marketing collateral to promote the new release of the support site. Also make sure that your web site is listed first or instead of the support phone numbers.

By following these best practice guidelines and your Project Plan, your release of RightNow Service will be successful and your company can begin to accomplish its' overall business objectives.
