

# 10 Easy Ways to Become an Instant Service Hero

**Rob Irizarry**  
Director, Technical Support  
RightNow Technologies



# Who are you?



# 1) See the Big Picture

- View yourself, and your organization, as a strategic partner in the business (vs. necessary evil/cost of doing business) that can deliver one of the most important business differentiators
- What are competitors doing / not doing?
  - Areas you need to strengthen
  - Weaknesses you can take advantage of
- What's going on internally?
  - Talk to Sales / Marketing / Product Development
  - How can you assist vs. impede
- Don't Boil the Ocean
  - Create a roadmap for change
  - Set aggressive goals
  - Break into bite-sized chunks
  - Demonstrate progress with each advancement
    - o Confirms direction with management
    - o Excites your team



## 2) Deliver knowledge how & when your customers want it

- Choice of Channel – Web, Email, Chat, Voice...
- Easy to access – One click from home page
- Simple navigation – Avoid the Indiana Jones hunt...
- Relevant, up-to-date content
  - Process to suggest and expire content
    - Propose Answers Feature
    - Expire Content Feature
  - SmartAssistant – Use Rules to show relevant answers
  - Answer Feedback – Let customers help you tune content
  - Conditional Sections – Show different knowledge based on user



# Easy Access to Knowledge

Social Security Online - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Stop

Address http://www.ssa.gov/ Go Links

**GPO**  
Government Pension Offset provisions are changed by recent legislation.

 **Social Security Online**  
The Official Website of the U.S. Social Security Administration

Seguro Social en Español Need BIG Text?

www.socialsecurity.gov How to Contact Us About Us Careers with Us Search Other Languages

Wednesday, Aug 30, 2006 6:03:10 AM Last updated: Thursday, Aug 24, 2006 10:15:00 AM

Questions about:  Go

**What you can do Online**

**New Rules for Getting a Social Security Number & Card**

**Social Security News**

- [Social Security Delivers the Most Popular Baby Names for 2005](#)
- [Social Security Trustees release their 2006 Report](#)
- [Commissioner Barnhart Unveils New Disability Determination Process](#)
- [Public Warned about Identity Theft E-mail Scam](#)
- [Social Security has released its FY 2007 and Revised FY 2006 Annual Performance Plan](#)
- [Social Security announces the 2006 Cost of Living Adjustment](#)
- [Apply here for extra help with prescription drug costs](#)
- [Report fraud, waste and abuse | More news...](#)

[About Social Security's Future](#)

[Use your ZIP code to find our office](#)  
[Add to your favorites](#) | [E-mail this page to a friend](#)

**Retirement**

- [Plan your retirement](#) | [Calculate your benefits](#)
- [Do you qualify?](#) | [Apply for retirement benefits](#)
- [Already receiving benefits](#)

**Medicare**

- [New Medicare Prescription Drug Plan](#)
- [No Penalty for 2006 if you Qualify for Extra Help with Medicare Prescription Drug Costs](#)

**Disability and SSI**

- [Do you qualify?](#) | [Apply for disability benefits](#)
- [Already receiving benefits](#) | [Ticket to Work](#)
- [Adults disabled before age 22](#)
- [More disability information](#)

**Widows, widowers & other survivors**

- [Report a death](#)
- [Qualify and apply](#)
- [Already receiving benefits](#)

**Get help with your situation**

- [Marriage, divorce, and name changes](#)
- [Birth of a child](#) | [Death in the family](#)
- [You disagree with our decision](#) | [More situations ...](#)

**Resources**

- [Your Social Security Statement](#)
- [Forms](#) | [Publications](#)
- [Actuarial resources, History, Research & Data](#)
- [Freedom of Information Act](#)
- [Social Security's Financing, Planning & Budget](#) | [International](#)
- [Our Program Rules](#) | [EEO Data for No Fear Act](#) | [Rulemaking](#)
- [Regional & Other Social Security Websites](#)
- [Request a Social Security Speaker](#)

**Information for:**

- [The Press](#) | [Congress](#)
- [Employers](#) | [The Self-Employed](#)
- [Women](#) | [Kids](#) | [Schools](#)
- [Demographic Groups](#) | [Immigrants](#)
- [Attorneys & Representatives](#)
- [Health & School Professionals](#)
- [Vendors, Contractors, & Service-Disabled Veteran-Owned Small Business](#)
- [Federal, State & Local Government Employees](#)
- [Government Agencies](#)
- [Medicare Outreach](#)

**ELECTRONIC RECORDS express**

**FIRSTGOV**  [Privacy Policy](#) | [Website Policies & Other Important Information](#) | [Site Map](#) | [Mission](#) | [Regulations.gov](#)  
This is a U.S. Government computer system subject to Federal law

**ExpectMore.gov**

Internet

# Answers on Main Website Home Page

United Illuminating - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://www.uinet.com/>

This site might require the following ActiveX control: 'Adobe Flash Player 9' from 'Adobe Systems Incorporated'. Click here to install...

**ui**  
The United Illuminating Company

Home Customer Service FAQ's Careers UIL Holdings Site Map Quick Links

**A World of Energy Information is Just One Click Away!**

**ui EnerNet™**

**Pay Your Electric Bill Online**  
Not enrolled?  
[sign up](#) [log-in](#)

**Outage Tracker**  
Click [here](#) to view Outage Reports/Map in the UI territory

**Rates and Tariffs**  
Click [here](#) for an explanation of your rates and tariffs.

**Current News**  
[07/14/06 Two Major Connecticut Retailers Join The United Illuminating Company to Reduce Electrical Load This Summer](#)  
[06/16/06 UI Announces Agreement with the City of Bridgeport for the Purchase of Steel Point](#)  
[Archived News](#)

[Information for Suppliers/Aggregators](#)

**Help Center**  
Looking for Help? Click [here](#) to find answers to the most frequently asked questions.

**Top Questions:**

- [Have a question about your online bill?](#)
- [Why did my bill due date change?](#)
- [Why is my electric bill so high?](#)
- [How do I enroll in UI's online bill payment?](#)
- [Why did my Budget Billing amount change?](#)
- [I need more time to pay. What are my options?](#)

**Save money and help conserve energy when we need it most.**

*wait 'til 8*

[Find out more...](#)

**Other Happenings**

**Read the bill insert for July**  
Click [here](#) to read.

**New Choice for Clean Energy:**  
CTCleanEnergyOptions is a new program that supports renewable energy produced from natural means such as wind, water and more. [[Download PDF](#)][[Download FAQ's](#)]

**Monk Parakeet Nests on Electrical Equipment in UI's Service Territory** - Click [here](#) to learn more.

**2006 UI Sponsored Seminars:** Building Operator Certification (BOC) training seminars - Click [here](#) to learn more.

**NOW AVAILABLE:** Click [here](#) for a free annual credit report for our customers.

Search

Internet

**RIGHT NOW SUMMIT 2006**

### 3) Understand how customers interact

- Every knowledge interaction ends at one of eight points
- The path users follow to get to one of these outcomes teaches you something about your operation and/or your customers
- Understanding the path to each of the outcomes allows you to take action
  - Take advantage of session data to tune your knowledge base
  - Every investment here saves \$\$\$ in agent costs

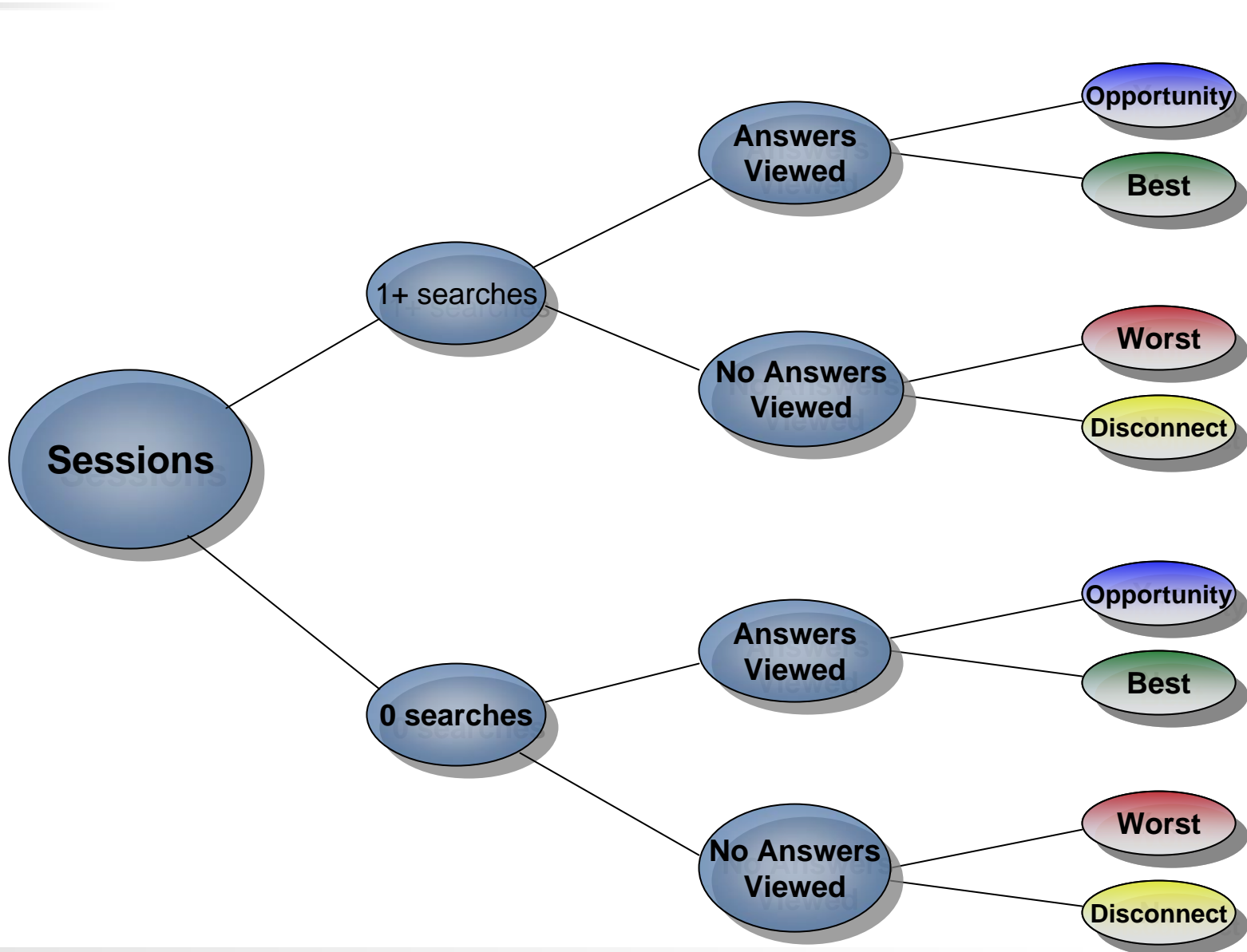


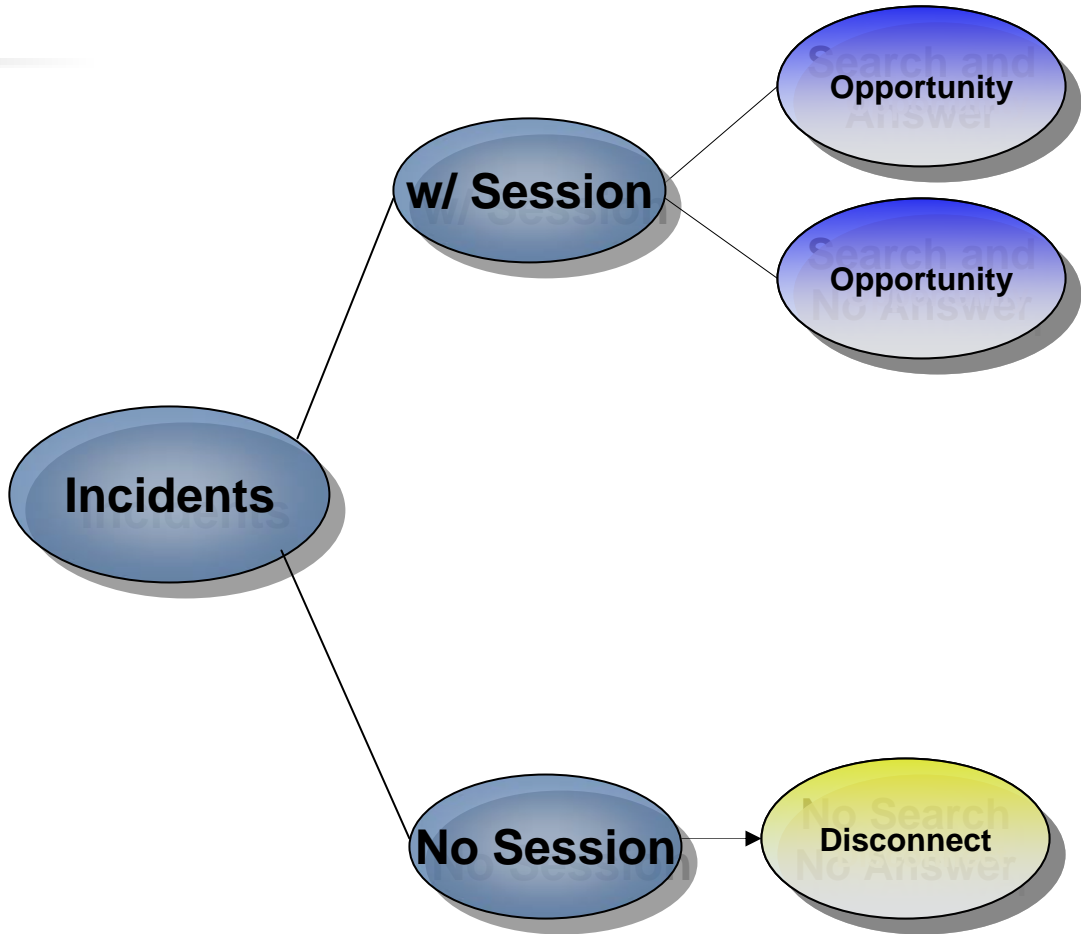
**Session**

**Searches?**

**Answers?**

**Incidents?**





- Look at Session Data
- Create new answer?
- Tune existing answer?

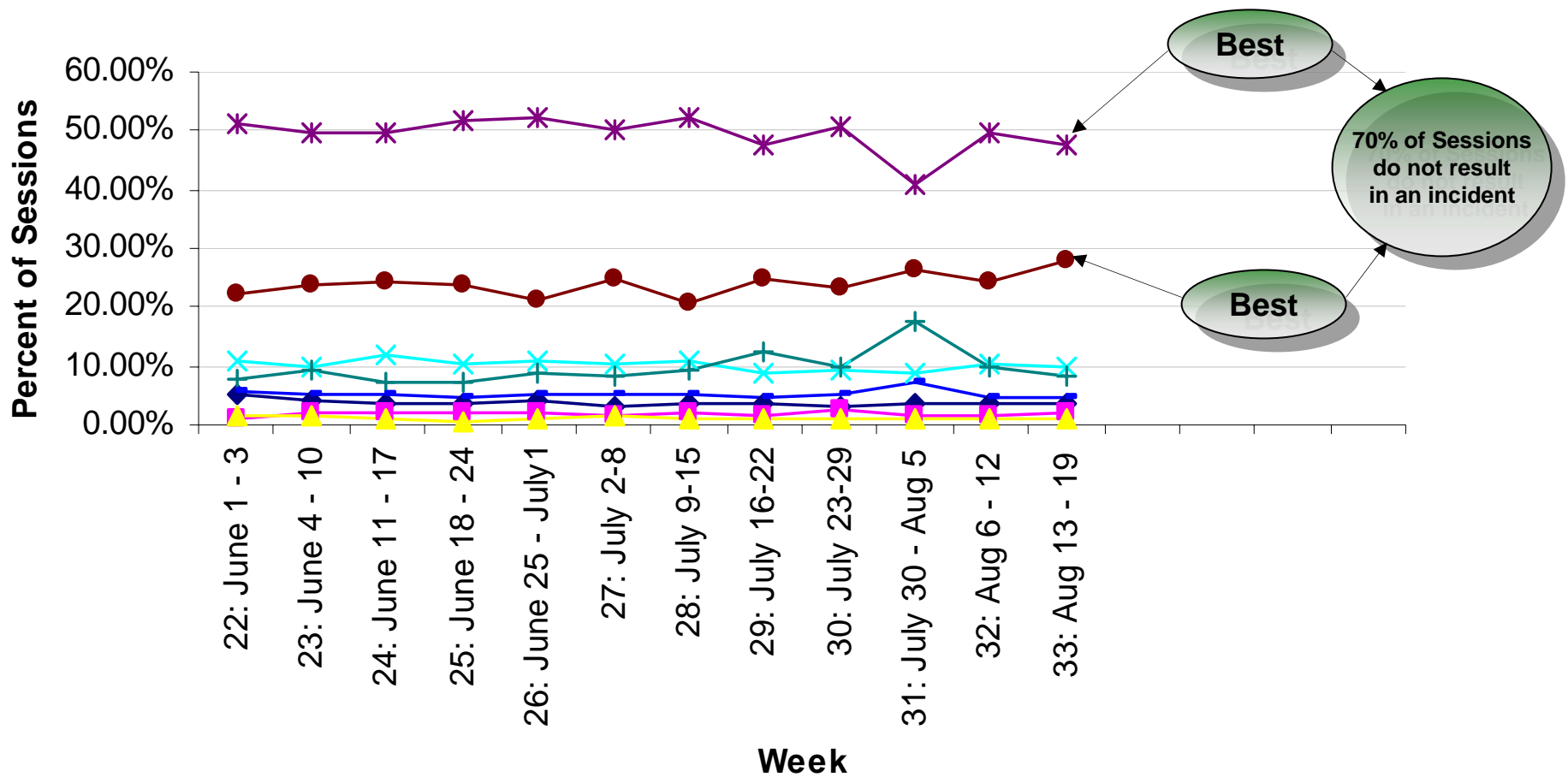
- Look at Session Data
- Question phrased correctly?
- Would answer push help?

Are you?

- Sending SmartAssistant suggested solutions with email responses?
- Using Message on Hold to advise customers KB?
- Using Voice Self Service?
- Scripting Correctly?



## Session Breakout by week



- ◆ 1. Incidents with Search with Ans View ed
- ▲ 2. Incidents No Search with Ans View ed
- ▲ 3. Incidents with Search, No Ans View ed
- ✕ 4. Incidents Only - No Search, No Ans View ed
- ✱ 5. No Incident with Search with Ans View ed
- 6. No Incident, No Search, with Ans View ed
- + 7. No Incident with Search, No Ans View ed
- 8. No Incident, No Search, No Ans View ed

## 4) Automate Workflow

- Understand rules engine capabilities
- Balance of too few vs. too many – Pareto Principle
- Top Five Rule Uses
  - Auto Response
  - Routing / Assignment
  - Escalation
  - Answer Management
  - Service Level Agreements
- Five Novel uses for Rules
  - CC:
  - Drive Pager
  - Do Not Create Incident
  - SmartSense™
  - Catchall



## 5) Turn Data into Knowledge & Act!

- Site Reports
  - Service Summary
  - Keyword Search
- Agent Reports
  - Login
  - Group Activity
  - Effectiveness
- Custom Reports
  - SmartSense
  - Unusual traffic activity
  - Thread Count
- Make use of Interactive, Scheduled and/or Exception modes of the analytics engine





Reports

- Service
  - Agent Reports
    - Agent Activity
      - Agent Activity
      - Group Activity
    - Agent Effectiveness
      - Agent Effectiveness - Detailed
      - Agent Effectiveness - Simple
      - Group Effectiveness - Detailed
      - Group Effectiveness - Simple
    - Agent Login
      - Agent Login
      - Group Login
    - Agent Performance
      - Agent Performance - Detailed
      - Agent Performance - Simple
      - Group Performance - Detailed
      - Group Performance - Simple
    - Agent Transactions
      - Agent Transactions
      - Group Transactions
  - CTI Reports
  - Email Reports
  - Incident Reports
    - Incident Activity
    - Incident Creation Rate
    - Incident Effectiveness
    - Incident Performance
    - Incident Trend
      - Backlog
      - Closed
      - Created
      - Incident Trend
      - Responded
    - Incidents Created
    - Open Incidents
    - Profile of Incidents
      - Age
      - Edit Time by Incident
      - Incidents Created & Resolved
      - Incidents Outside SL (Abs)
      - Incidents Outside SL (Rel)
  - Knowledge Base Reports
  - Live Reports
  - Offer Advisor Reports
  - Other Reports
  - Queue Reports
  - Service Level Reports
  - Site Reports
    - Answer Notifications
    - Answers Viewed
    - Keyword Search
      - Keyword Search

Parameters Description Report

# Keyword Searches

## Phrase Stem

Phrase Stem	Search Count	Answers
UPGRAD	112	101
MANUAL	82	154
BEST PRACTIC	72	79
RULE	70	172
1350	68	3
FAIL LOAD MESSAG	56	271
SLA	50	27
METRIC	45	34
SYSTEM REQUIR	44	385
TRAIN	43	30
REPORT	42	226
SMART ASSIST	42	106
SPAM	41	16
CBT	41	7
CUSTOM TAB	40	660
CLASS	39	4
DOCUMENT	39	124
SURVEY	38	106
PROXI	37	14
INTEGR MANUAL	37	155
INTEGR	34	44
LOGIN	34	244
STANDARD TEXT	34	334
TUTORI	33	5
API	33	15
CSS	33	21
NET	32	9
HTML EDITOR	32	176
STUFF	32	123
TUNE UP	31	262
SCHEDUL REPORT	31	254
ACCESS LEVEL	30	399
ERROR	29	78
ENVIRON	28	28
CUSTOM FIELD	28	727
KEYWORD	28	47
MAILBOX	28	95
ASK QUESTION	28	237



Reports

- Service
  - Agent Reports
    - Agent Activity
      - Agent Activity
      - Group Activity
    - Agent Effectiveness
      - Agent Effectiveness - Detailed
      - Agent Effectiveness - Simple
      - Group Effectiveness - Detailed
      - Group Effectiveness - Simple
    - Agent Login
      - Agent Login
      - Group Login
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      - Agent Performance - Detailed
      - Agent Performance - Simple
      - Group Performance - Detailed
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      - Agent Transactions
      - Group Transactions
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  - Email Reports
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  - Knowledge Base Reports
  - Live Reports
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  - Other Reports
  - Queue Reports
  - Service Level Reports
  - Site Reports
    - Answer Notifications
    - Answers Viewed
    - Keyword Search
      - Keyword Search

Parameters Description Report

# Keyword Searches

## Phrase Stem

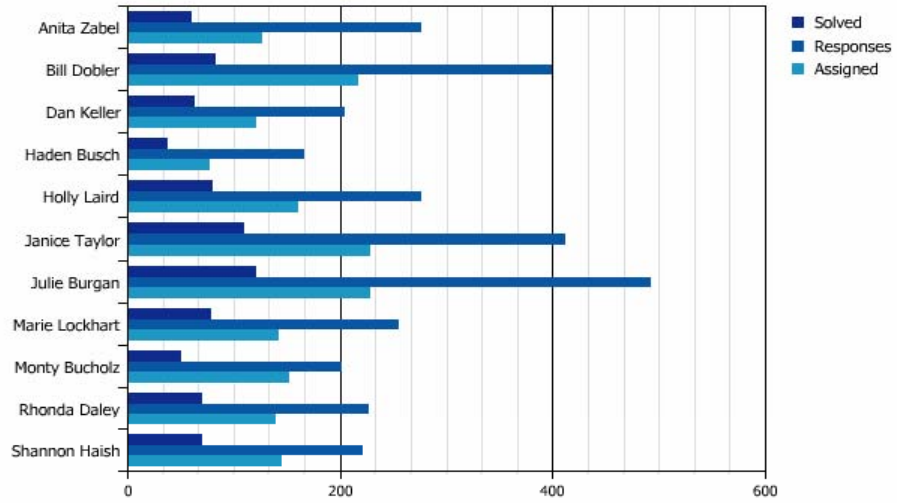
Phrase Stem	Search Count	Answers
1351	8	0
CASTL	12	0
A_SUGGEST_LIMIT_CAT_LVL	5	0
SCREENPOP	6	0
PDA	6	0
GEXPAND	10	0
FORREST	6	0
1575	10	1
SAWMIL	8	1
1124	6	1
1183	6	1
ERD	6	1
FIREFOX	6	1
GROUP_DAT	6	1
2364	8	1
WAP	6	1
STREAM	12	1
2308	12	1
2209	12	1
1838	8	1
SMARTGUID	7	1
SPF	13	1
RNTINFO	13	1
68	13	1
ARCHITECTUR	7	1
2302	7	1
1925	9	1
CNAME	9	1
POPCHART	6	1
1491	5	1
1560	5	1
ENVIRONMENT	15	1
1837	5	1
2015	5	1
2141	5	1
2411	5	1
2489	5	1
CORDA	5	1



# Agent Effectiveness

## Agent

Agent Effectiveness



Agent	Assigned	Responses	Solved	RPA	FCRR
Anita Zabel	127	276	61	2.2	26.0%
Bill Dobler	218	399	83	1.8	17.0%
Dan Keller	122	204	63	1.7	31.1%
Haden Busch	78	167	38	2.1	17.9%
Holly Laird	161	277	81	1.7	29.2%
Janice Taylor	228	412	110	1.8	33.3%
Julie Borgan	228	492	122	2.2	17.5%
Marie Lockhart	142	256	79	1.8	27.5%
Monty Bucholz	153	202	51	1.3	27.5%
Rhonda Daley	140	227	70	1.6	35.0%
Shannon Haish	146	222	70	1.5	32.2%
<b>Total</b>	<b>1743</b>	<b>3134</b>	<b>828</b>		

Record Count: 11

## 6) Solicit Feedback (and act on it) !

- Internal and External - Everyone's your customer
- Answer Feedback – Drive Knowledge Improvements
- RightNow Feedback™
  - Customer Satisfaction
  - Closed Incident
  - Product Feedback
- Closed Incident – Archimedes Lever



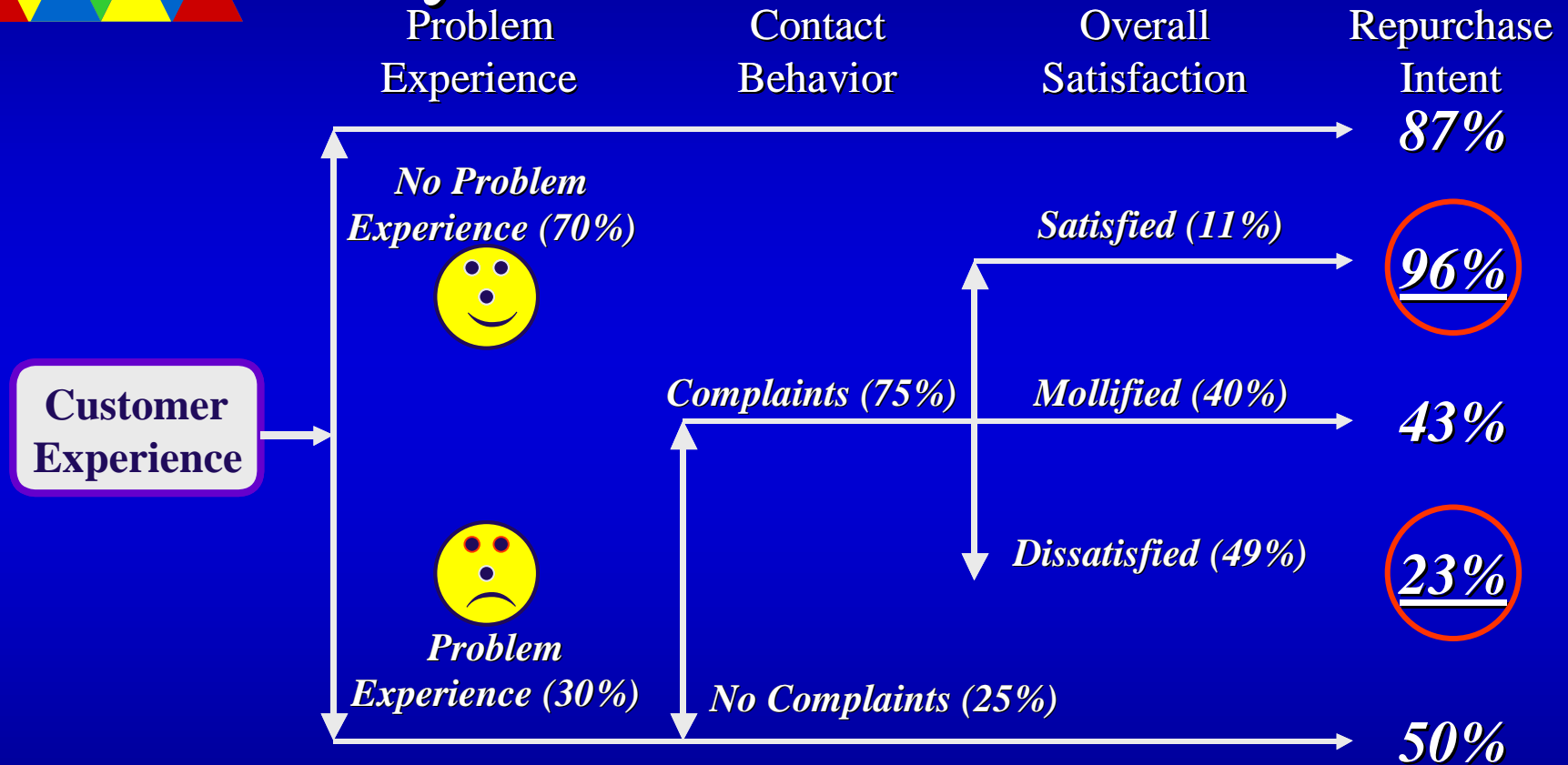
# Closed Incident Surveys

- Likely the easiest improvement lever you have to move
- 3-5 Questions with numerical scale
- Text Box for free-form feedback
- Use Rules to raise alerts for dissatisfaction
- Call customers back – speed of follow-up is important
- Make systemic fixes and report back to customers





# Recovery Behavior



Source: TARP's White House Study

# 7) Proactive Communication

- Proactive Communications
  - Internal and External – Evangelize!
  - Product Release
  - Process / Policy Changes
  - Newsletters
- Event-Driven Campaigns
  - Product Introduction
  - Training
  - Lifecycle Events
- Leverage Ability to Monitor & Measure Effectiveness
  - Open
  - Click
  - Delivery Statistics



## 8) Empower Employees via Integrations

- Custom Tabs – Provide access to business systems seamlessly within the RightNow Solution
  - RMA
  - Order Tracking
  - Account Status
  - Billing
- XML API
  - Push data or pull data from the RightNow solution based on business events
- External Events
  - Push data to or pull data from other systems on based on creation or update events in the RightNow Solution - Organizations, Contacts, or Incidents



# Support Site Custom Tabs

The screenshot shows a web browser window titled "Incident (RightNow Customer Service)". The interface includes a left-hand navigation pane with fields for Reference # (060809-000009), Primary Contact (Daniel Murray), Status (Solved), Assigned (Curtis Johnson), Product (RightNow Service), Category (Installations and Upgrades), Disposition (Hosting Issue), SLA (Preferred - Sev 2-4(17767)), and Queue (Tier 1). The main content area displays a message with the subject "HMS UPDATE - Test Site Created [7.5.5.0] [RIGHTNOW]" and a response dated 08/09/2006 01:56 AM. The response text states: "Your Test Site has been created for RIGHTNOW, please update this incident with any questions or issues you may have. Here is a list of php files that will not be carried forward. You can find copies of these files in your backup directory. Here is a list of PHP files that will not be carried forward. You can find copies of these files in your backup directory." Below the message is an "Add" section with radio buttons for "Customer Entry", "Response" (selected), and "Note", along with buttons for "Offers...", "Standard Text...", "Suggestions...", "Search...", "Quick Text...", and "Quick Answer...". At the top of the main content area, there are several tabs: "Messages", "Details", "Time", "Organization", "Contact", "CSI", "HMS", "ErrorLog", and "Sales Leads". The "CSI", "HMS", "ErrorLog", and "Sales Leads" tabs are highlighted with red boxes. The bottom of the window features buttons for "Save", "Cancel", "Send Response", "Options...", "Spelling", "Forward", and "Print". The system tray at the bottom shows "Done", "User: Rob Irizarry", and "3:10 AM".

**Incident (RightNow Customer Service)**

**Reference #**  
060809-000009

**Primary Contact**  
Daniel Murray  
dmurray@rightnowtech.co  
RightNow Support Site

**Status**  
Solved

**Assigned**  
Team Lead  
Curtis Johnson

**Product**  
RightNow Service

**Category**  
Installations and Upgrades

**Disposition**  
Administration  
Hosting Issue

**SLA**  
Preferred - Sev 2-4(17767)

**Queue**  
Tier 1

**Messages** | Details | Time | Organization | Contact | **CSI** | **HMS** | **ErrorLog** | **Sales Leads**

**Subject** HMS UPDATE - Test Site Created [7.5.5.0] [RIGHTNOW]

**Response (XML\_Created Placeholder)** 08/09/2006 01:56 AM

Your Test Site has been created for RIGHTNOW, please update this incident with any questions or issues you may have.  
Here is a list of php files that will not be carried forward. You can find copies of these files in your backup directory.  
Here is a list of PHP files that will not be carried forward.  
You can find copies of these files in your backup directory.

rightnow

**Add**

Customer Entry  
 **Response**  
 Note

Offers...  
Standard Text...  
Suggestions...  
Search...  
Quick Text...  
Quick Answer...

Save Cancel Send Response  Options... Spelling Forward Print

Done User: Rob Irizarry 3:10 AM

## 9) Scream first internally...Before your Customer Does Externally!

- Avoid the Ticking Time Bombs...
  - Escalation Rules
    - o Alert Management in time for diving catch – customers understand solutions take time but can't stand radio silence...
  - Views / Color Expressions
    - o Sort and Highlight issues in Priority order
    - o Increase agent focus and efficiency
  - Exception Reports
    - o Understand what's about to expire on a macro basis



# Views with Color Expressions

Support Console (RightNow Customer Service)

Support Console

Quick Search  TIER 1 TEAM Refresh Search

New Edit Delete Print Forward Propose

Viewing TIER 1 TEAM: Top Level > Tier 1 / Dan Keller Records Found: 12

Ref #	Care Status	Org	Contact	Sev	Subject	Status	SAM	Last Response	Last Update	Age (Hrs)
1 051221-000101	Preferred	Cendant - Sotheby's Interna	Scott	4	New Live Customer	Unresolved	Dan Kelli	08/19 12:46 AM	08/19 12:46 AM	6062
2 060621-000174	Preferred	Bell Microproducts	Gina	4	New Live Customer	Unresolved	Dan Kelli	08/01 10:38 AM	08/01 10:38 AM	1690
3 060830-000110	Preferred	Pinnacle Systems	Benjamin	2	Survey suddenly just stopped	Unresolved	Dan Kelli	08/30 10:38 AM	08/30 10:38 AM	16
4 060830-000114	Preferred	Pinnacle Systems	Benjamin	2	Pinnacle FR Metrics - socked timeout	Unresolved	Dan Kelli	08/30 10:50 AM	08/30 10:50 AM	16
5 060830-000200	Preferred	Momentous	Debbie	3	Right Now Test Site	Updated	Dan Kelli	08/30 03:44 PM	08/30 03:44 PM	11
6 060822-000231	Preferred	Alienware Corp.	Christopher	3	Techmail error	Updated	Dan Kelli	08/23 03:21 PM	08/25 08:36 AM	204
7 060824-000195	Preferred	Proxim Wireless Corporation	Ken	3	Views - Wild Card Search Issue	Unresolved	Dan Kelli	08/25 04:19 PM	08/28 11:36 AM	156
8 060825-000071	Preferred	Cendant/Century21	Tracy	3	History needed for several email addresses	Updated	Dan Kelli	08/28 02:13 PM	08/28 03:00 PM	137
9 060828-000219	Preferred	Activision	Michael	3	question about feedback	Updated	Dan Kelli	08/29 02:05 PM	08/29 08:56 PM	54
10 060821-000128	Preferred	Momentous	Jason	3	Unreads and Transport the Momentous site	Unresolved	Dan Kelli	08/29 03:13 PM	08/29 08:36 PM	2458

Organization  Contact CSI HMS ErrorLog Sales Leads

Name: RightNow Support Site  
 CRM State: Sales & Service & Marketing  
 Login: RightNow  
 Password:   
 SLA: Priv-Integration, Priv-Partners-HMS, Preferred - Sev 1, Preferred - Sev 2-4

Address Type: Billing  
 Country: US  
 Street Address:   
 City:   
 State/Prov: --  
 Postal Code:

Custom Fields

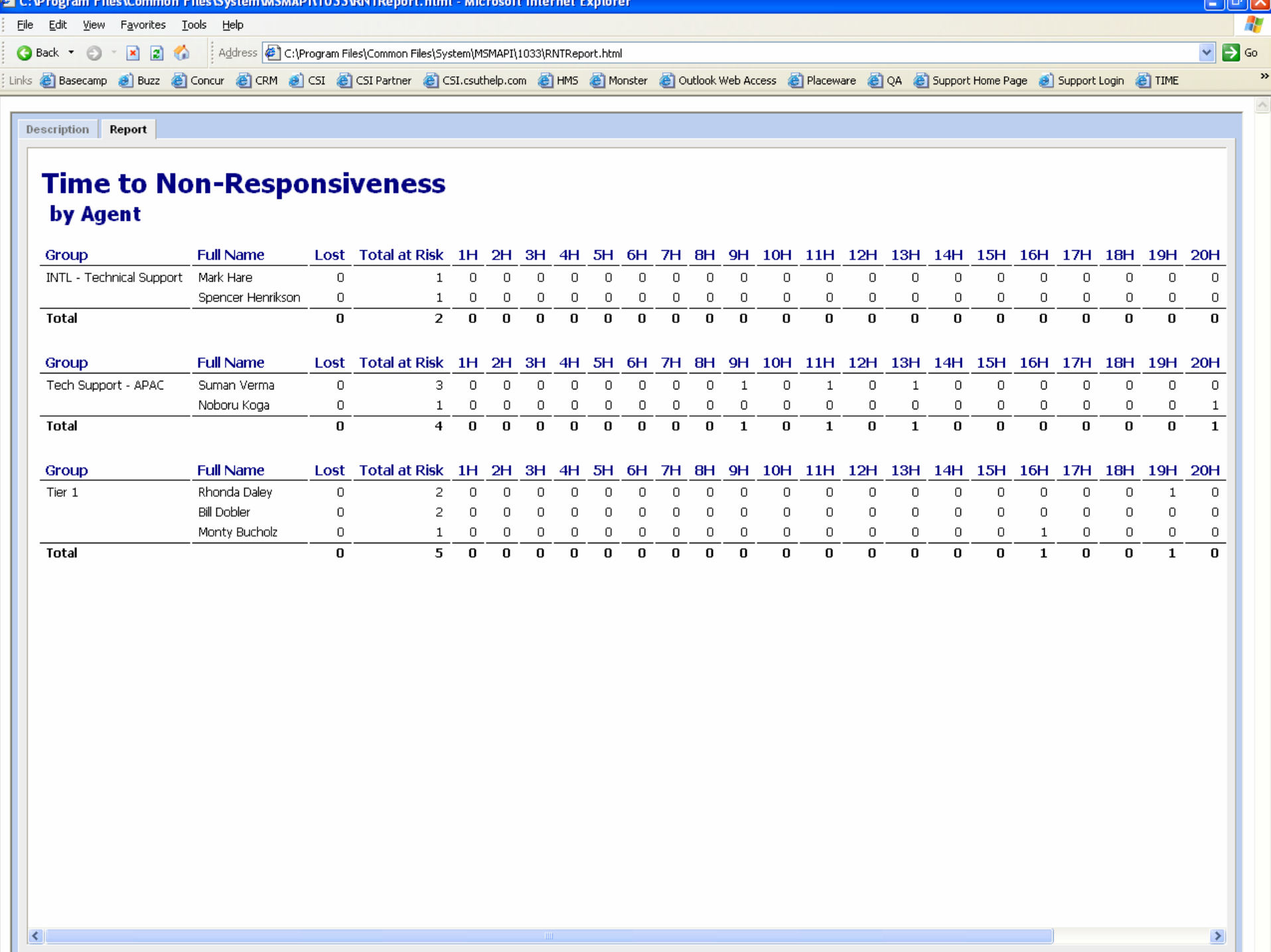
GENERAL

SAM (Spprt Acct MGR): Unassigned  
 TAM (Tech Acct Mgr): --  
 OSA (Outsrcl Admin): --  
 Value:

Contacts  Incidents  Opportunities  Files  Audit Log View in Separate Window

Solved	+0:00	-73:45	Agent (Phone)	060825-000070	Disable Internet Photonics site
Solved	+0:00	-95:01	Ask a Question	060823-000108	Test by Penni
Development	+0:00	+0:00	Agent (Phone)	060818-000065	7.5.5 Issue: Fatal error on end-user pages with custom menu field

Save Cancel Send Response Options... Spelling Forward Print



Description Report

## Time to Non-Responsiveness by Agent

Group	Full Name	Lost	Total at Risk	1H	2H	3H	4H	5H	6H	7H	8H	9H	10H	11H	12H	13H	14H	15H	16H	17H	18H	19H	20H
INTL - Technical Support	Mark Hare	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Spencer Henrikson	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total</b>		<b>0</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Group	Full Name	Lost	Total at Risk	1H	2H	3H	4H	5H	6H	7H	8H	9H	10H	11H	12H	13H	14H	15H	16H	17H	18H	19H	20H
Tech Support - APAC	Suman Verma	0	3	0	0	0	0	0	0	0	0	1	0	1	0	1	0	0	0	0	0	0	0
	Noboru Koga	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
<b>Total</b>		<b>0</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>

Group	Full Name	Lost	Total at Risk	1H	2H	3H	4H	5H	6H	7H	8H	9H	10H	11H	12H	13H	14H	15H	16H	17H	18H	19H	20H
Tier 1	Rhonda Daley	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0
	Bill Dobler	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Monty Bucholz	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0
<b>Total</b>		<b>0</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>

# 10) Generate Revenue

- Partner internally to find opportunities and/or do it yourself
- Offer Advisor
  - RightNow Solution Feature
  - Requires services (yours or ours) to implement
- Leads Tab – Screen Shot
  - Custom Tab we built
  - Native function in RightNow 8
- Proactive Communication
  - Leverage your contact history to announce & sell new products, add-ons & upgrades
  - Event Driven Campaigns are good for this – Ex. Pre-Order



# Offer Advisor

Support Console (raddtest8)

Support Console

Quick Search ▾ All Incidents Refresh Search Fill

New ▾ Edit ▾ Delete ▾ Print ▾ Forward Propose

Viewing All Incidents Records Found: 126

Offer Advisor - Radd Icenoggle

Promotions Found: 3

	Name	Summary	Rank /	% Yes	Match	History
1	3000 off peak minutes	Get 3000 off peak minutes when you purchase a ConexFlip Phone	1	100		Yes
2	50% extra minutes	Free every 50% extra minutes Free every month	2	0		
3	\$20 Fixed monthly bill with Mix	\$20 Fixed monthly bill with Mix It	3	0		

Suggestions Found:

Name	Summary	Rank /	% Yes	Match	History
Yes to Promotion '3000 off peak minutes'	See Incident 051025-000007				

**Create New Opportunity**

Name: Yes to Promotion '3000 off peak minutes'

Summary: See Incident 051025-000007

OK

**Guide: 3000 off peak**

When you purchase the

- \* 3000 off-peak minutes
- \* Increased Battery Pow
- \* Free Voicemail

For only \$25 per month

**Product Details: ConexFlip 5280**

ID: 5280  
 Name: ConexFlip 5280  
 Description: Small and lightweight, the ConexFlip 5280 phone combines modern styling with enhanced mobile communications. Global roaming capabilities and a built-in microbrowser let you access news, weather, stocks, and more on the go. Personalize your phone with downloadable ring tones and unique screen saver designs!

Yes Interest No Search Close

Quick Text...  
Quick Answer...

Save Cancel Send Response  Options... Spelling Forward Print

Done User: Administrator 9:49 AM



# Sales Leads Tab

Support Console (RightNow Customer Service)

Support Console

Quick Search ▾ Default Refresh Search

Viewing Default

Records Found: 0 (initial search disabled)

Ref_no	Email	Subject	Updated	Assigned	Status Type	Last Respo	Severity
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Organization Contact CSI HMS ErrorLog **Sales Leads**

**Submit Sales Leads**

Org Name: Linksys - Subsidiary of Cisco Systems  
Account Manager: Shellee Meagher [smeagher@rightnow.com]  
Manager: Marcus Bragg [marcus@rightnow.com]  
Reference Number:

Assigned Rep: \* Shellee Meagher

Customer Contact: Brian Stoner

Value Guide:

- Fast-Track
- Fast-Track to CRM Upgrade Program
- Pilot Services
- Pilot Services
- CORE Implementation Services
- Hosted Mailbox
- RightNow Sales
- RightNow Marketing
- Site Indexing
- Remote Implementation Support

Why does the customer need the service?

Who did you speak with?

What did you tell them regarding the service?

Did the customer confirm interest?

Submit Query

Save Cancel Send Response Options... Spelling Forward Print

Done User: Rob Irizarry 6:35 AM

# 11) Stay Healthy

- Customer Success Index
  - Success Score
    - o Measures Five Key Performance Indicators
    - o 0-100 Point Score
    - o Ensures you are getting the best value from our solution
    - o Available via the My Stuff page
- Tune-Ups
  - Your business is changing, as is our solution
  - Covers all modules - Sales / Marketing / Service
  - Ensure you are maximizing your efficiency and ROI
  - Schedule via the My Stuff Page on our support Site



# Success Score

Health Key			
Area	Value	Points Earned	Point Groups
Last Tuneup Date	Within 6 Months (or live date within 90 days)	15	30
	Between 6-12 Months	10	
	More than 12 Months	0	
Last Tuneup Score	80 or above	15	
	60 to 79	10	
	Less than 60	0	
Version	7.5.2 or Above	20	20
	7.0.x - 7.5.1.x	10	
	Below 7.0.x	0	
Integration	XML/External Events/Custom Tabs	10	20
	None	0	
Event Participation (User Conference or Roundtable)	One event in the last year	10	
	None or Older than 1 year	0	
Traffic	10,001 Hits or Greater	15	15
	Between 5,001 and 10,000 Hits	10	
	Between 1,001 and 5,000 Hits	5	
	Less than 1,000 Hits	0	
Features Used	Ask a Question or Email Gateway Enabled AND	15	15
	Answers Enabled AND		
	At least two workflow/business rules		
	Missing one of the criteria above:	0	
<b>Total:</b>			100

**Q & A**