REACHING NEW HEIGHTS IN CUSTOMER EXPERIENCE

RIGHT NOW TECHNOLOGIES

SUMMIT 07

Analytics Best Practices

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Agenda

- RightNow's Reporting approach
- Roles and Responsibilities
- Reporting Steps and Activities
- Related Best Practices
- Resources, Documentation, Training

RightNow's Reporting Approach – RightNow Analytics

- Designed, developed, and supported by RightNow
- Control our own destiny and respond to customer enhancement requests
- Reports can be integrated into the apps
- Database schema is fully integrated into the tool
- RightNow delivers:
  - Reports built with the tool
  - The tool to build reports
- For reporting on RightNow application data *(only)*

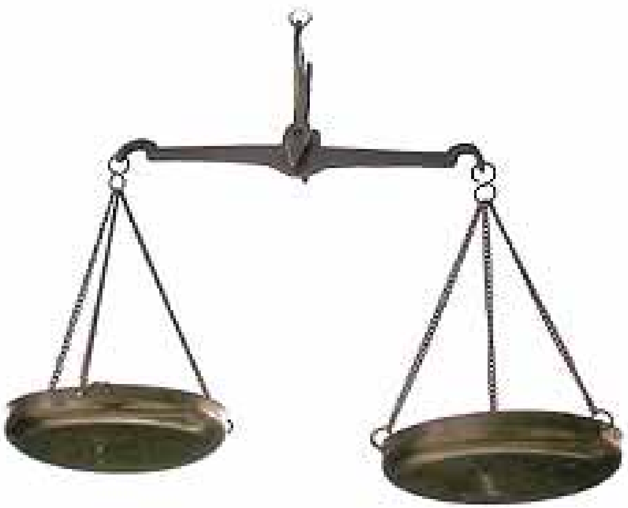
RightNow's Reporting Approach – cont'd

How does RightNow Analytics strike a balance?

Easy to use

- **Too simple**
- **Can't report the way you need to**

e.g. Excel



Robust

- **More challenging,**
- **Steeper learning curve**

e.g. Oracle Reports

Easy to use <u>and</u> powerful

RightNow Analytics

This Best Practice discussion assumes:

- ☑ You will use RightNow Analytics
- ☑ You will do most of your report development in-house
- ☑ You appreciate the importance and value of reporting

Defining Roles and Responsibilities

- Who requests reports?
- Who gathers reporting requirements?
- Who builds reports?
- Who tests reports?
- Who runs reports?
- Who is responsible for related application changes?
- Who maintains reports?

Defining Roles and Responsibilities

- Which roles and how many you have will depend on several factors including:
  - Your Company/Division/Department size
  - How extensive RightNow apps are used
  - Data volumes
  - Number of Requestors
  - Number of Reports
  - Resources, Budgets, org structure...

Roles and Responsibilities – Best Practices

- Reporting User
- Power User
- Reporting Specialist
- RightNow Administrator

Roles and Responsibilities

Reporting User

- Request what they need to run their business or operations
- Run reports, select appropriate filter values, perform drilldowns, run-time formatting
- Typically includes managers and executives

Training: In-house walk thru of running reports, changing filters, and run-time formatting

Roles and Responsibilities

Power User

- Mastered run-time formatting
- Able to build and makes changes to basic reports

Training/background; Good with MS Office tools, technical aptitude, can be trained in-house via Train-the-Trainer approach or via RightNow

Roles and Responsibilities

Reporting Specialist

- Primary responsibility and ownership for RightNow reporting requirements
- Builds, organizes, schedules, maintains, optimizes, secures, updates

Training/background; Ideal candidate will have a background in reporting, RDBMS familiarity, and receive full RightNow Analytics training course

Roles and Responsibilities

<u>RightNow Administrator</u> *(often wears additional hat of reporting specialist)*

- Changes needed for reporting requests
  - Product/Category/Disposition changes
  - New or changed custom fields
  - Queues and Statuses
  - Sales Strategies/Stages
  - SLAs and Default Service Levels
  - Work Hours and Holidays

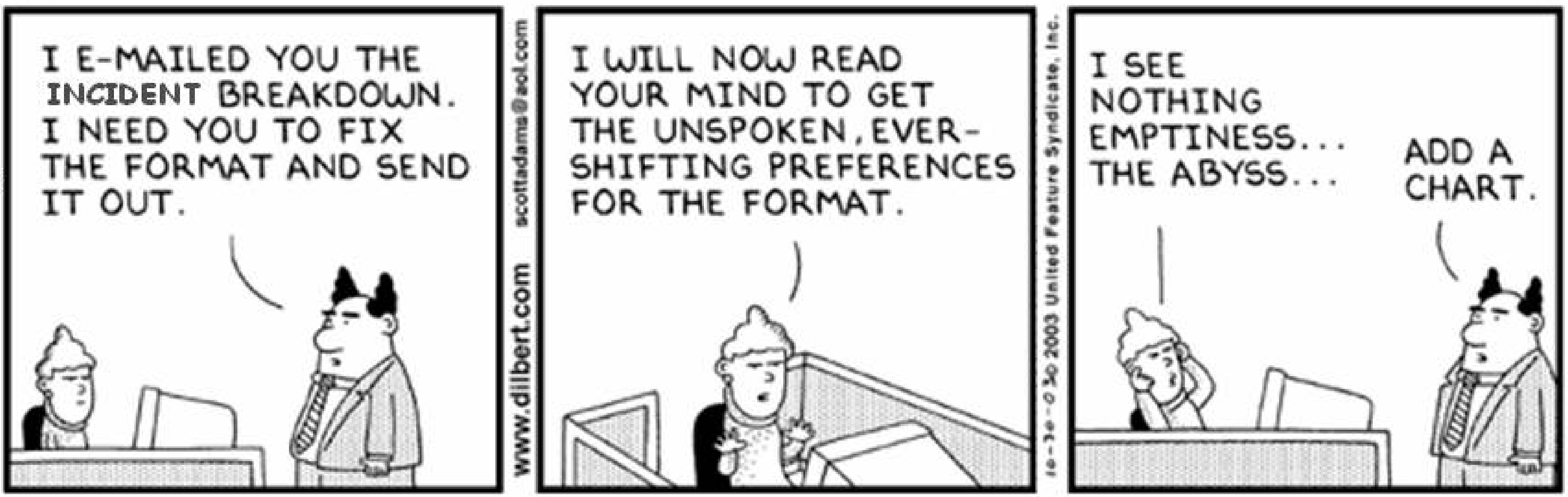
Roles and Responsibilities - Realities

- Your RightNow administrator may also be your reporting specialist
  - *Prioritize work requests*
- You have to deal with staff turnover
  - *Document! Train backups*
- Training is time consuming and expensive
  - *Not training is even more expensive and time consuming*

Reporting Processes – Several steps and activities

- **Request**
- **Gather Requirements**
- **Complete Mockup**
- **Review existing**
- **Build Report**
- **Build Schedule**
- **Unit Test**
- **User Acceptance Test**
- **Grant Access**
- **Placement**
- **Maintain and Optimize**

The Request

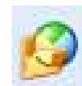

I E-MAILED YOU THE INCIDENT BREAKDOWN. I NEED YOU TO FIX THE FORMAT AND SEND IT OUT.
scottadams@aol.com
www.dilbert.com
I WILL NOW READ YOUR MIND TO GET THE UNSPOKEN, EVER-SHIFTING PREFERENCES FOR THE FORMAT.
© 2003 United Feature Syndicate, Inc.
I SEE NOTHING EMPTINESS... THE ABYSS...
ADD A CHART.

The Request

- Do you need a formal process to manage reporting requests?

  Some larger RightNow customers use an internal RNT interface for requests - Ask A Question form

- Do you need a prioritization and approval process?

  Biggest consideration is volume of requestors and volume of requests

Gather Requirements, Mockup

- Define and use a standard requirements template
- Clarify filters, format, grouping, subtotals, ordering, recipients…
- Distribution method will impact report design (e.g. scheduled reports, drilldown)

Gather Requirements – example template

GENERAL REPORT INFORMATION				
REPORT NAME				
CUSTOMER NAME				
CUSTOMER CONTACT INFORMATION	Phone		E-mail	
CUSTOMER SITE/URL				
CUSTOMER INTERFACE NAME				
LOGIN/PASSWORD	Login		Password	
DATE OF REQUEST		REQUESTED COMPLETION DATE		
HOW IS THIS REPORT BEING PAID FOR?				
RIGHTNOW STAFF REQUESTING REPORT	Name			
e-mail		Phone		

REPORT SUMMARY Provide a summary of the requested report specifications and functionality below.

BUSINESS PURPOSE AND OBJECTIVES This information will help us present the report information most appropriately, and may prompt suggestions by RNT on how to construct the report.	
How will this report will be used within the business?	
Objectives for creation and use of this report	

Gather Requirements – example template cont'd

REPORT DETAILS					
AUDIENCE/PERMISSIONS					
Viewers		Who can run?		Restrictions	
REPORT RECIPIENTS					
Recipient Name		E-Mail Address			
SCHEDULING PARAMETERS					
When to Run		E-mail Addresses			
Report Format Required		Subject Line			
FORMATTING SPECIFICATIONS: List any formatting requests for the report:					
BUSINESS IMPACT:					
FINAL LOCATION OF REPORT: List the file path for the report to reside in the Analytics directory:					
CHART(S): List specifications for any charts you wish to include in the report:					
RESULTS ORDERING: Specify how you would prefer to see your results ordered/sorted:					
DATA EXCEPTIONS: Data exceptions & criteria to highlight within the report:					
TOTAL/SUB TOTAL PARAMETERS: List total/subtotal parameters by specific columns					

VERSION CONTROL			
Version	Change Description	Modified By	Date
1.0	Initial Document draft		

DOCUMENT SIGN-OFF		
Date	Signature	Position/Role

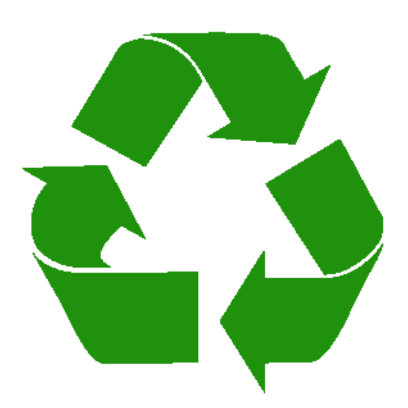
Mockup example

Create a companion mock-up

	A	B	C	D	E	F	G
1							
2		**Weekly Agent Productivity**					
3							
4							
5		Agent	Incidents Solved	Avg Response Time			
6							
7		Bob	250	5hrs32min			
8		Mary	175	6hrs11min			
9		Tom	225	4hrs18min			
10		Jill	325	5hrs48min			
11							
12		Total	975				
13		Average	269	5hrs12min			
14							
15							
16		RefNum	Subject	Customer Name	Date Created		
17		070827-00098	Is it possible for	John Jones	27-Aug		
18		070827-00099	How can my orde	Sue Miller	15-Aug		
19		more listing...					
20							
21		Record Count: 325					
22							

Review Existing

- Is there a delivered report that’s close? Clone and tweak
- Is there a previously delivered report that’s close? Clone and tweak
- Are there functions in the report that have already been created that you can copy?



Build the Report

- Get the data right using the schema and data dictionary
- The fewer tables in your report the better
- Document what you did and why within the report itself
- Iterative approach; add, preview, tweak, preview, repeat

Build the Report – more tips

- Use relative date filters with ranges for defaults whenever possible

There are three levels of filters: Report, Node, Group. Define your filters at the 'highest' level possible; Report, then Node, then Group

- Fixed Filters perform better than run-time filters. If the filter really doesn't need to change, make it Fixed.

Build the Report – even more tips

- Consistent use of fields linked for Drill Down Level 
- Add charts, data exceptions, pretty formatting… after core report is working
- Save As – clone a copy as a working backup early on. *8.x Preview functionality*

Build the Schedule

- Not required for ad-hoc reports
- Use multiple schedules for the same report if possible
- Put scheduled reports into separate folders for easy identification
- Put name of folder and name of report in the body of the schedule for identification
- Chose you or the ‘administrator’ as the from Email address

Unit Test

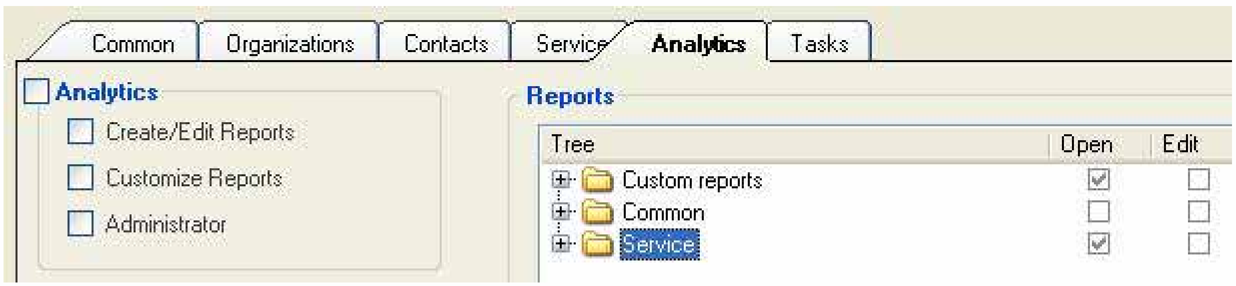
- To make sure the data is right, compare against simpler reports
- Run with several combinations of filter values
- Run against a sufficient set of data so that all components of the report are tested

User Acceptance Test

- To requester should perform UAT on the report that they requested
- Document changes needed, screen-shot annotation of formatting changes

Grant Access

- Update relevant profiles; who will be allowed to run and/or change the report
- 8.x Analytics security options:



Placement

- Pre 8.x placement means simply which folder to put the report into
- Post 8.x placement means in addition to where to store the definition of the report in the Analytics Explorer Folder - link the report to:
  - The relevant Navigation Set areas
  - The relevant Workspace Tabs

Maintain

- Maintain reports
  - Update inclusive filters for additions of field values (new Queues, Groups…)
  - Change Control process for change requests? Common requests include:
    - Change the sorting
    - Change the formatting
    - Change the receiving distribution list

Maintain – cont'd

- Watch for opportunities to:
  - Consolidate and eliminate reports
  - Tie common reports together into dashboards
  - Remove unused reports *(last date ran)*

More Best Practices - General

- Integrate reporting requirements into the **early** requirements gathering stage of the implementation. Reporting rqmnts could impact:
  - Number of Databases, Number of Interfaces
  - How integrations are done
  - Historical data load requirements
  - Customer definitions
  - Queues, Status, Prod/Cat/Disp structures
  - Custom fields
  - Staff Account and Group organization
  - Service Level definitions

More Best Practices - General

- Dashboards *(“Containers” in 7.x)* are a very convenient way to group and distribute reports that go together
- Embrace the new Reporting Anywhere model in 8.x and make report running as convenient and easy as possible
- Use RightNow Analytics to show execs the power and value of your RNT investment

More Best Practices - Formatting

- Define a consistent look and feel for your reports:
  - Report Styles
  - Chart Styles (colors, formatting)
  - Color Schemes (company colors)
  - Images (company Logo…)
  - Text Fields (confidentiality statement)

Things to Avoid – *AKA bad practices*

- Filtering on specific Staff Accounts
- Extensive use of ‘My Reports’ Folder
- Extensive use of ‘Not in List’ filters
- Embedding logic into fields; NE01Sales, SW03Retail and using reporting to pull and group by 3rd and 4th positions
- Unnecessary run-time filters
- Cloning reports/views to just have a different default filter value *(All Solved Incidents, All Unresolved Incidents…)*

Analytics Resources

- Customer Forum
  - Analytics Folder ~100 postings

    e.g. How week-ends can be excluded from reports
- Regional Classroom training
  - 3 days, Offsite, Demo data, other customers
- Onsite Custom training
  - X days, Onsite, your data, your reports

Analytics Resources

- RightNow Analytics Manual
  - Community Library, 506 pages
- Data Dictionary
  - Built into the tool in 8.x
  - Library for pre-8.x

Analytics Resources

- Rightnow.custhelp FAQs

  ~ 200 reporting-related FAQs such as:

  #68 Standard Reports (link to Catalog)

  #2192 Sending a report only if it has data

  #2200 Managing report types in 8.x

  #2380 Improving performance of reports and views

  #2447 Creating and using Dashboards in 8.x

Analytics Resources

- Professional Services **Analytics Center of Excellence**
  - Additional paid service
  - Take your specific requirements
  - Build and test the reports off-site
  - Focused group of experts

- Professional Services On-site Consulting
  - Knowledge transfer while build reports

Questions and Answers

Thank You!

Questions