



REACHING NEW HEIGHTS IN CUSTOMER EXPERIENCE

**RIGHT**  
**NOW**  
TECHNOLOGIES  
SUMMIT 07

## Integration Best Practices

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## Agenda

- Why Integrate?
- RightNow Integration Capabilities
- Common Applications of Integration
- Integration Best Practices
- Using Middleware – Cast Iron Systems
- Q&A

# A little humor...



How the customer explained it



How the Project Leader understood it



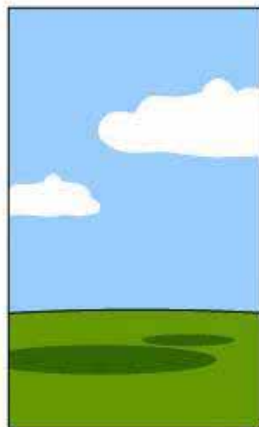
How the Analyst designed it



How the Programmer wrote it



How the Business Consultant described it



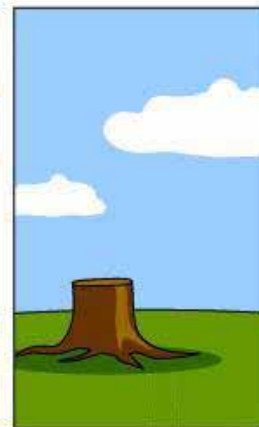
How the project was documented



What operations installed



How the customer was billed



How it was supported



What the customer really needed

# Why Integrate?

## 8 Steps to Great Customer Experiences

- 1 Establish a knowledge foundation
- 2 Empower customers
- 3 Empower frontline employees
- 4 Offer multi-channel choice
- 5 Listen to your customers
- 6 Design seamless experiences
- 7 Engage proactively
- 8 Measure and improve continuously



# Why Integrate?

1

## Establish a Knowledge Foundation

### Challenge

- A Knowledge Foundation can be comprised of data resident in many different systems

### Solution

- Through integration, data from these disparate systems can be made available within RightNow (or vice versa)

### Example

- Keep customer information up-to-date in RightNow when changes are made to the master customer record which is maintained in another system (e.g., ERP system)

The screenshot displays the TruGreen website interface. At the top, there's a navigation bar with links for 'ABOUT US', 'SERVICES', 'TIPS & RECOMMENDATIONS', 'SPECIAL OFFERS', 'CONTACT US', and 'YOUR ACCOUNT'. Below this, there's a 'Local Branch Locator' section with a search box for zip codes and a 'SEARCH FOR SERVICE NOW' button. A 'FREE Lawn Analysis' section is also visible. The main content area features a search bar with 'Zip Code' (set to 44) and 'Category' (set to All). A search for 'aphids' has been performed, resulting in a detailed page titled 'Trees and Shrubs - Aphids'. This page includes a 'Question' section with the text 'I noticed swarms of small insects on my trees' new growth. What are these?' and an 'Answer' section stating 'These insects are likely aphids. They favor succulent new growth and can grow to large numbers very quickly. Many insecticide products control aphids.' Below the answer is a 'How well did this answer your question?' section with a rating scale. A 'Related Answers' section lists several related topics: 'Tree and Shrub Pests', 'Trees and Shrubs - Grubs', 'Importance of Pesticides', 'Trees and Shrubs - Whitefly', and 'Targeted Pest Management'. A 'Back to Search Results' link is located at the bottom right of the page.

# Why Integrate?

2

## Empower Your Customers

### Challenge

- How do you enable your customers to help themselves? What choices do you provide to your customers to do so?

### Solution

- Provide customers with access to data and functions that are not necessarily specific to RightNow through integration with non-RightNow systems

### Example

- Custom tab on end user pages which allows customers to log in and view product purchase history
- RightNow Voice provides IVR prompts which facilitate a data dip into a DB for order status

The screenshot shows the Electronic Arts Customer Support website. At the top, there's a navigation bar with 'Home', 'FAQs', 'Contact Us', 'Utilities', and 'My Stuff'. Below that is a search bar with the text 'FIND SOLUTIONS TO YOUR EA TITLES'. A 'Step One: Select Platform' section is visible, with a dropdown menu for 'Select Platform'. The main content area is divided into 'NEWS & EVENTS' and 'GENERAL INFORMATION' sections. The 'NEWS & EVENTS' section includes articles for 'Command & Conquer: Generals 2', 'Battlefield 2142', 'EA Link', and 'The Sims 2 Seasons'. The 'GENERAL INFORMATION' section includes a 'SUPPORT SURVEY' with various checkboxes for user preferences. The footer contains a 'Privacy Certified' logo and copyright information for Electronic Arts Inc. in 2004.

# Why Integrate?

3

## Empower Frontline Employees

### Challenge

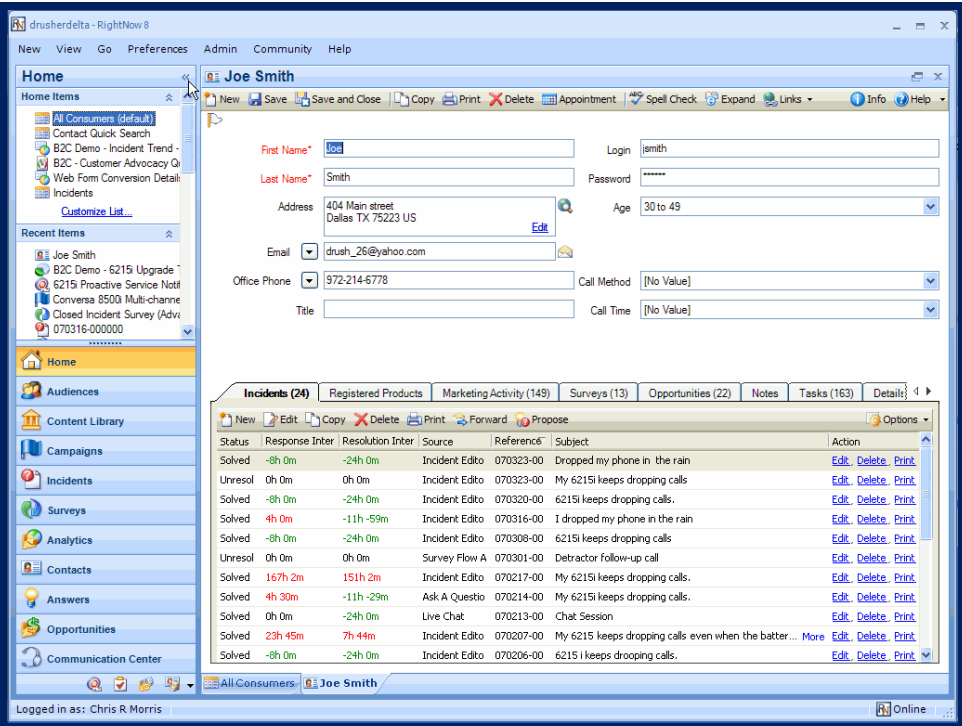
- How do you enable your frontline employees to better serve your customers? How do you enhance the customer experience during these interactions?

### Solution

- Provide frontline agents with access to data and functions that are not specific to RightNow through integration with non-RightNow systems
  - Consolidate the agent desktop

### Example

- Custom tab in RightNow CRM allows agents to submit RMAs and process replenishment orders



The screenshot displays the RightNow CRM interface. The top navigation bar includes 'New', 'View', 'Go', 'Preferences', 'Admin', 'Community', and 'Help'. The main content area is divided into two panes. The left pane shows a 'Home' section with 'Home Items' (All Consumers, Contact Quick Search, B2C Demo, Web Form Conversion Details, Incidents) and 'Recent Items' (Joe Smith, B2C Demo - 6215 Upgrade, 6215 Proactive Service Notif, Converse 8500 Multi-channe, Closed Incident Survey (Advi, 070316-000000). The right pane shows a user profile for 'Joe Smith' with fields for First Name, Last Name, Address, Email, Office Phone, Title, Login, Password, Age, Call Method, and Call Time. Below the profile is a table of 'Incidents (24)' with columns for Status, Response Inter, Resolution Inter, Source, Reference#, Subject, and Action. The table lists various incidents with their respective statuses and subjects.

Status	Response Inter	Resolution Inter	Source	Reference#	Subject	Action
Solved	-8h 0m	-24h 0m	Incident Edito	070323-00	Dropped my phone in the rain	Edit, Delete, Print
Unresol	0h 0m	0h 0m	Incident Edito	070323-00	My 6215i keeps dropping calls	Edit, Delete, Print
Solved	-8h 0m	-24h 0m	Incident Edito	070320-00	6215i keeps dropping calls.	Edit, Delete, Print
Solved	4h 0m	-11h -59m	Incident Edito	070316-00	I dropped my phone in the rain	Edit, Delete, Print
Solved	-8h 0m	-24h 0m	Incident Edito	070308-00	6215i keeps dropping calls	Edit, Delete, Print
Unresol	0h 0m	0h 0m	Survey Flow A	070301-00	Detractor follow-up call	Edit, Delete, Print
Solved	167h 2m	151h 2m	Incident Edito	070217-00	My 6215i keeps dropping calls.	Edit, Delete, Print
Solved	4h 30m	-11h -29m	Ask A Questio	070214-00	My 6215i keeps dropping calls.	Edit, Delete, Print
Solved	0h 0m	-24h 0m	Live Chat	070213-00	Chat Session	Edit, Delete, Print
Solved	23h 45m	7h 44m	Incident Edito	070207-00	My 6215i keeps dropping calls even when the batter...	More Edit, Delete, Print
Solved	-8h 0m	-24h 0m	Incident Edito	070206-00	6215i keeps dropping calls.	Edit, Delete, Print

# Why Integrate?

## 4 Offer Multi-Channel Choice

### Challenge

- Customers demand choice. How can you support interactions across a variety of mediums?

### Solution

- Integration can help to create a “one stop shop” experience whereby customers can easily do many things from one area

### Example

- Web forms hosted outside RightNow
- IVR performs data dip into DB to retrieve information
- Make RightNow content available outside the RightNow domain (e.g., context sensitive help)

The screenshot shows the Orbitz website's customer service interface. At the top, there's a navigation bar with links for Quick Search, Vacation Packages, Hotels, Flights, Cars & Rail, Cruises, and Activities. On the right, there are links for My Trips, My Account, Deals, and Customer Service. Below the navigation, a green banner reads "Welcome to Orbitz. Sign In. Register Now." and "TLC".

The main content area is titled "CUSTOMER SERVICE" and "Three ways to receive help".

**1 Search Frequently Asked Questions (FAQs)**

Enter keyword or phrase:  Select topic:

**Top 10 FAQs**

- [How do I change or cancel my online ticket?](#)
- [How can I see my reservations, and view or change my profile?](#)
- [What are Ticket Terms and Conditions?](#)
- [Colorado Winter Storm December 20th - 20th](#)
- [Is there a time limit on changing a flight?](#)
- [How do I change or cancel a non-refundable hotel reservation?](#)
- [How do I cancel a booked hotel reservation?](#)
- [How do I get my travel documents sent to my e-mail address?](#)
- [What documents do I need to go through airport security?](#)
- [What information and documents are needed for international travel?](#)

[Browse FAQs by topic](#)

**2 E-mail your questions**

We'll do our best to respond within 3 hours.

\*Your e-mail address:  \*Confirm your e-mail address:

\*Select topic:  \*Your question:

**3 Call us**

For immediate assistance, call our Customer Service Center at **1-888-856-4540**, or **1-312-416-8018** from outside of the US. Our Customer Service Center is open 24 hours a day, 7 days a week.

# Why Integrate?

## 5 Listen to Your Customers

### Challenge

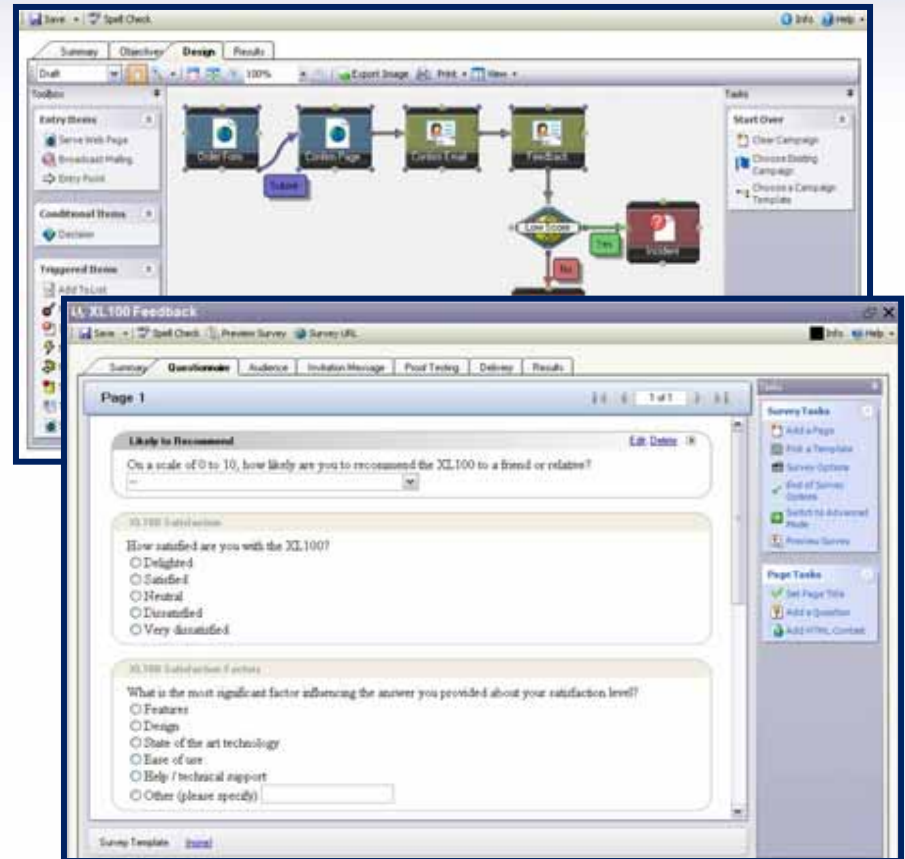
- How do we gather feedback from our customers on how we're doing when key data exists outside of RightNow?

### Solution

- Integration can facilitate the transmission of valuable customer details and feedback to and from RightNow, respectively.

### Example

- Contact details that are kept up-to-date via integration are used to segment customers for surveying
- Survey results are exported outside of RightNow for advanced reporting purposes



# Why Integrate?

## 6 Design Seamless Experiences

### Challenge

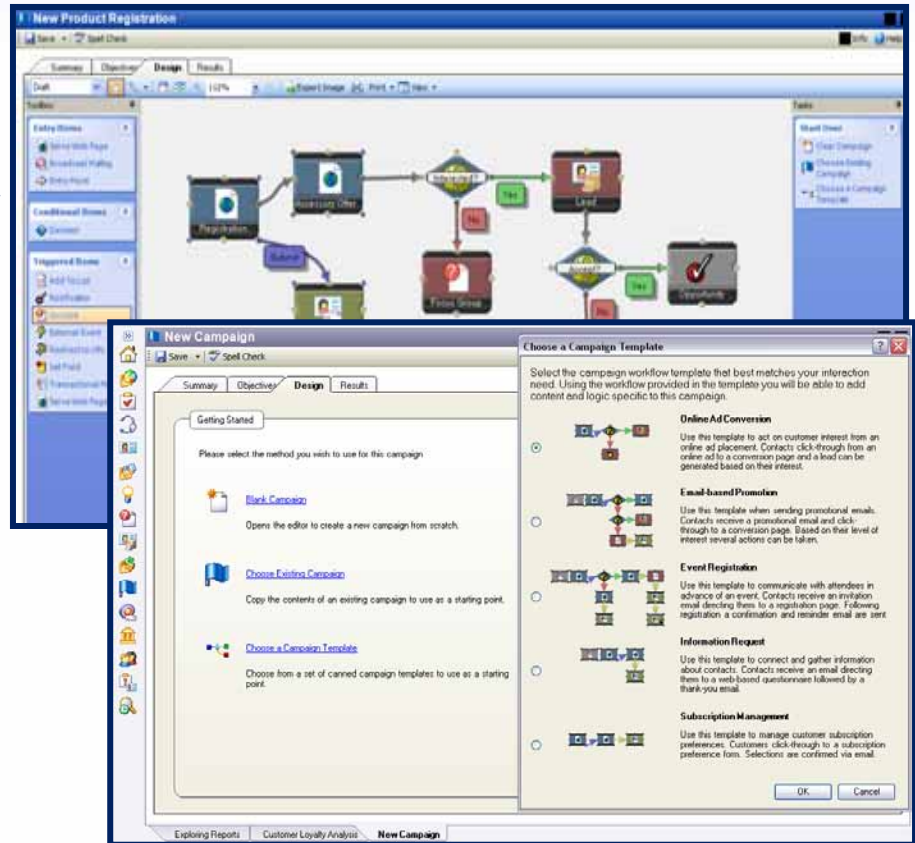
- Making cross-departmental interactions seamless to the consumer

### Solution

- Build stronger relationships with customers by designing cross-departmental experiences that are enabled via integration

### Example

- Custom tab in RightNow provides up-to-date order status details to agents on the phone with a customer
- Sales agents close Opportunities and Opportunity details are transmitted to an accounting system to initiate invoicing



# Why Integrate?

7

## Engage Proactively

### Challenge

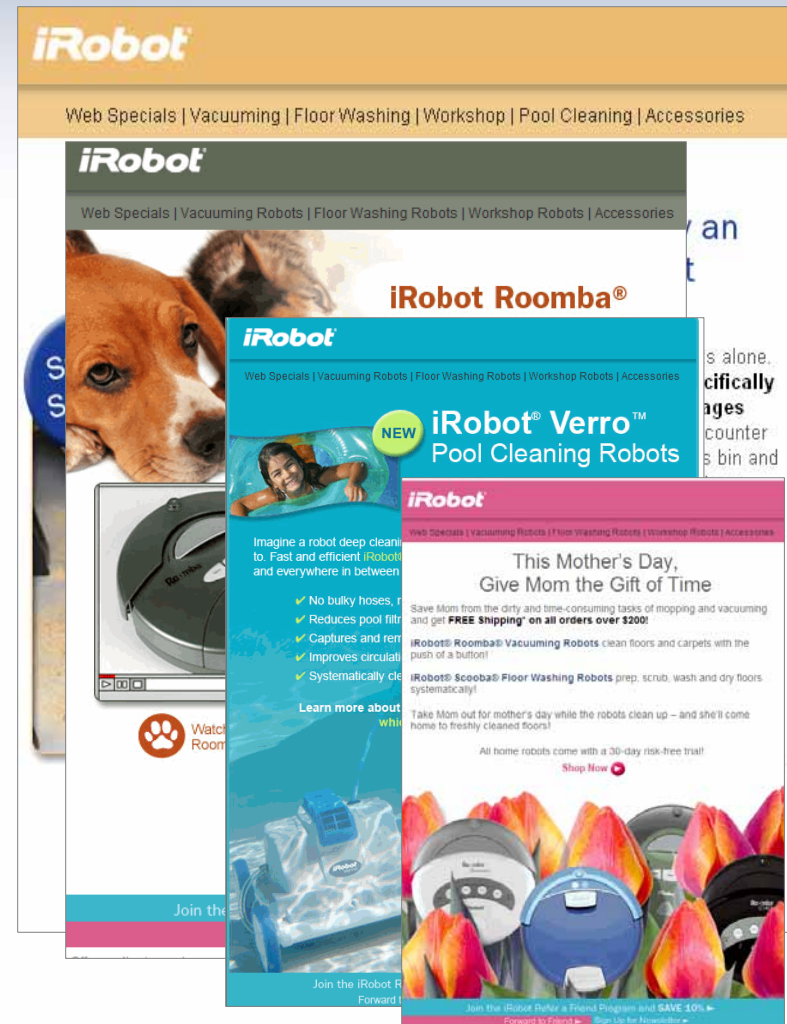
- Anticipating issues and / or opportunities before they happen, thus proactively serving your customers

### Solution

- Integration can enhance visibility into customer interactions thus enabling knowledgeable and proactive communication

### Example

- Customer segmentation occurs outside of RightNow and via RightNow Connect / XML API integration, contacts are pushed into Marketing campaigns



# Why Integrate?

8

## Measure and Improve Continuously

### Challenge

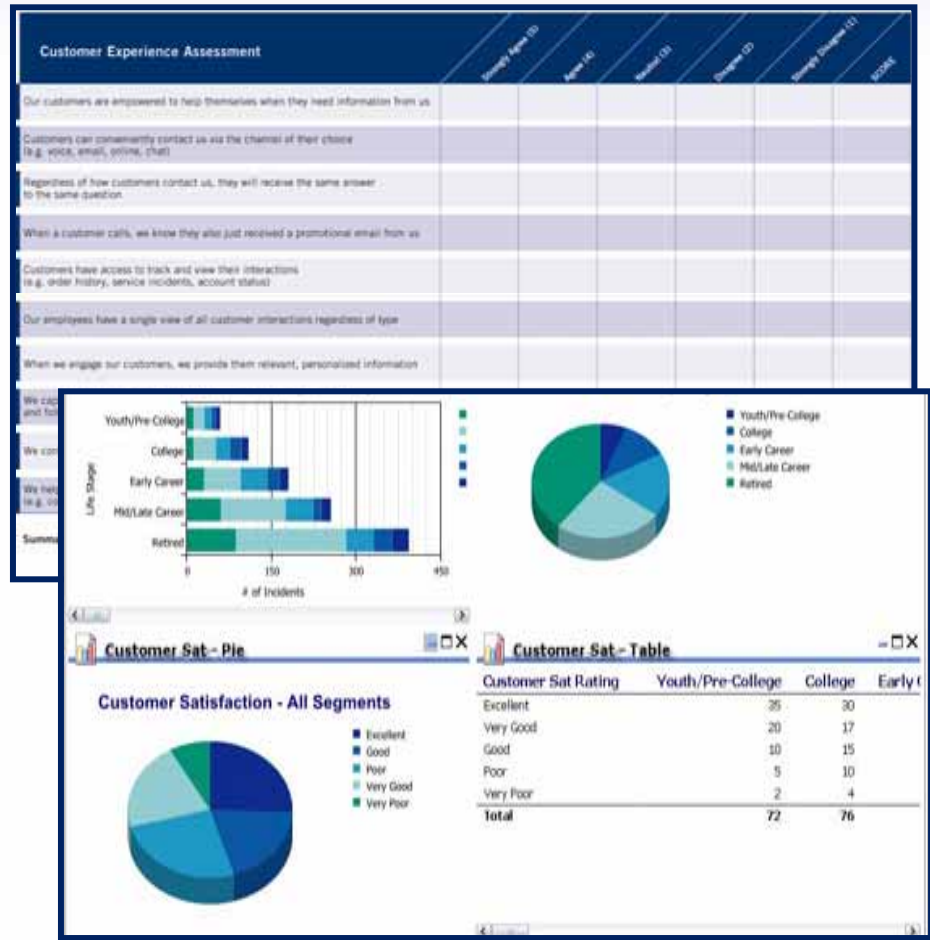
- Key customer data is resident in a variety of disparate systems and needs to be consolidated for reporting purposes

### Solution

- Integration enhances the visibility and reach of data, enabling reporting and analysis in support of continuous process improvement

### Example

- Customer interaction data is transmitted from RightNow to a data warehouse (which compiles data from a variety of customer-facing systems) for subsequent trending and analysis



## Why Integrate?

- Support critical business processes
  - Non-RightNow customer support functions (e.g., Incident management)
  - Product returns
  - Credit checks
  - Credit card authorization
- Support complex architectures
  - Only certain data is required to be made available in RightNow (RightNow is not the system of record)
  - The size of the data inhibits it from being stored in RightNow

## RightNow Integration Capabilities

- Custom Integration / Schema
  - Compiled Shared Object to incorporate custom database tables into RightNow Analytics and other areas of the application
- Data Imports
  - One time and recurring
  - Utilities for importing large amounts of data
- External Events
  - Scripts triggered through events (Create, Update, Delete)

## RightNow Integration Capabilities

- PHP – Look & Feel
  - Presentation and underlying functionality of customer facing pages can be customized to meet needs
- Composite Applications (Web Control)
  - Used when RightNow will be the presentation layer, but the data displayed is resident in another system
  - Typically a series of XML / SOAP API calls or Web Services tied to a number of user actions that can be carried out in RightNow
- Pass Through Authentication
  - Commonly used to transparently log customers into the RightNow end user pages when they have already logged into another site

## RightNow Integration Capabilities

- RightNow Connect
  - Real-time APIs that allow for the following:
    - Data Integration
    - Packaged Application Connectivity
    - Business Process Integration
    - Desktop Integration
    - Communication Integration
  - Provides both Java and .NET offerings
- XML APIs
  - Commonly used to create and maintain system objects in RightNow (Organizations, Contacts, Incidents, Answers, Opportunities, Tasks)
  - Can also be used to retrieve data and instantiate processes (e.g., Marketing Campaigns)

## RightNow Connect Overview

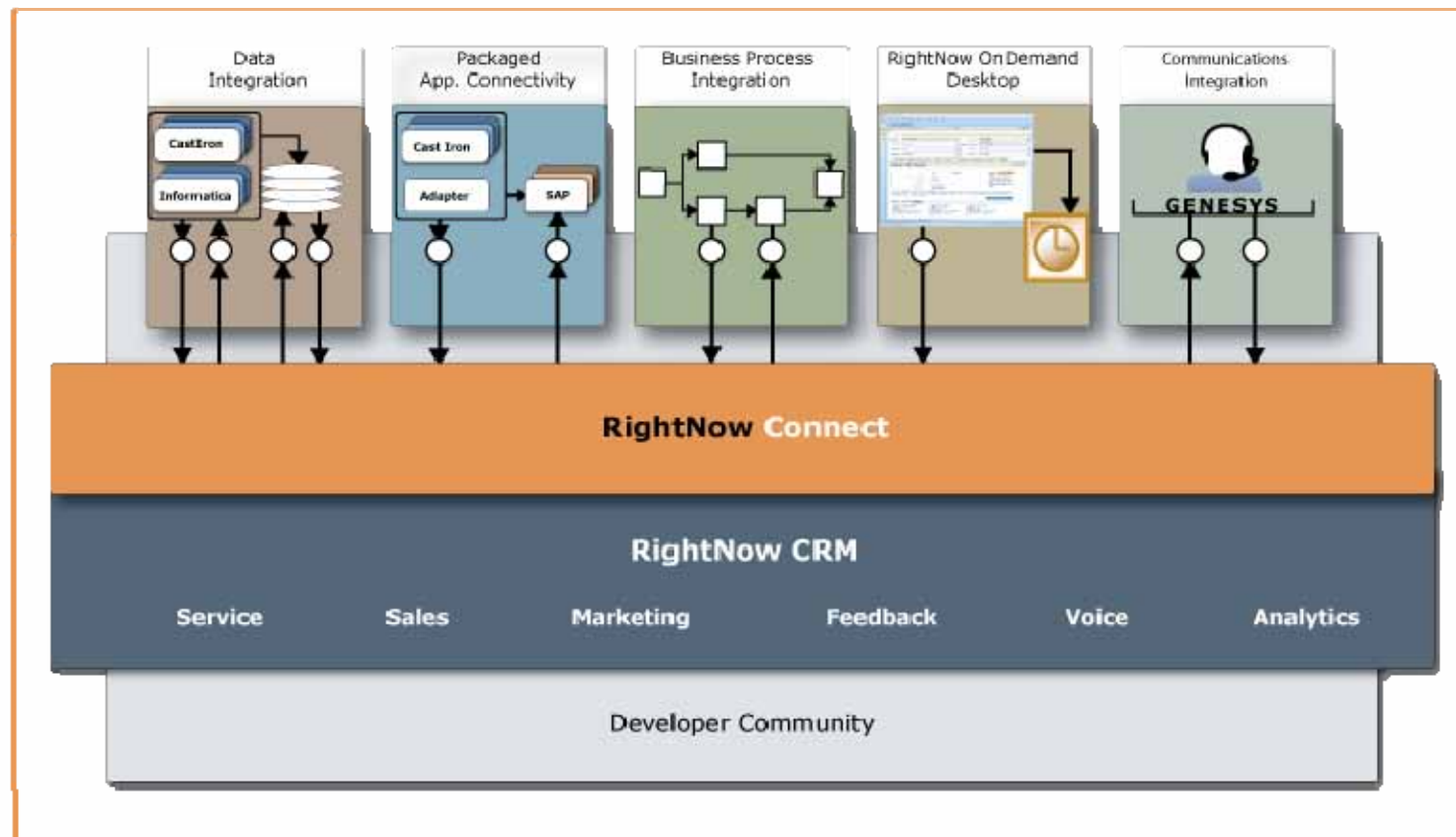
*RightNow Connect is a framework that enables the key integration types performed by our customers.*

- **Data Integration:** Provides the ability to move data between RightNow and other systems in either real-time or batch mode, allowing for reconciliation between data models and semantics
- **Packaged Application Integration:** Provides the ability to connect to other packaged applications by using custom or pre-built adapters
- **Business Process Integration:** Provides the ability to integrate RightNow data or functionality into Business Process Management systems
- **Desktop Integration:** Provides the ability to integrate our client interfaces with other desktop applications
- **Communications Integration:** Provides specialized connectivity for the RightNow application to the call center technologies

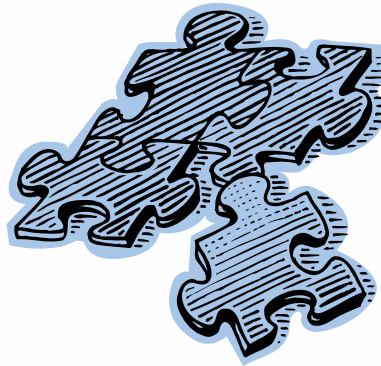
# RightNow Connect Overview

*RightNow Connect is a standards-based Service Oriented Architecture (SOA) framework that easily enables the key integration types performed by our clients*

## RightNow Connect



# Integration Best Practices



# Integration Best Practices

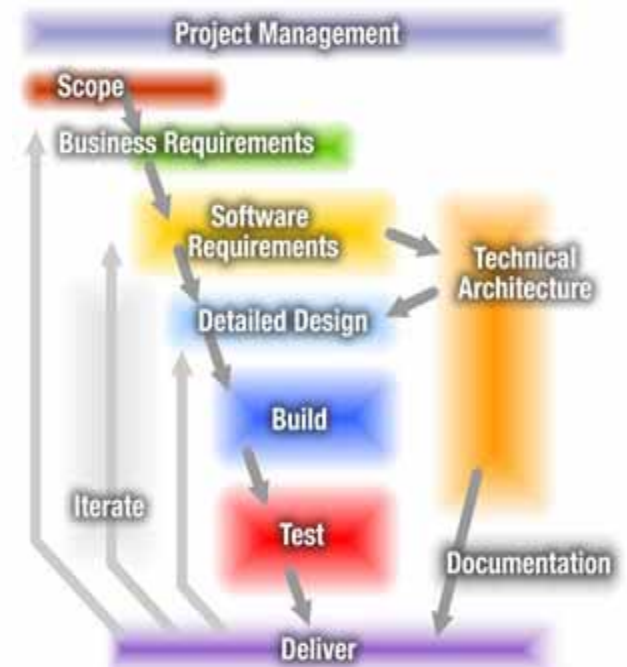
## **Begin with the end in mind**

- Determine what you are trying to accomplish first and then figure out how to get there.
- Start with a 30,000 foot view and then slowly take it down to sea level.
- Get down to the basics:
  - What are the business functions that the integrations will support?
  - What systems are involved?
  - Who is responsible for what?
  - Have you thought through all the alternatives?

# Integration Best Practices

## Let requirements drive design

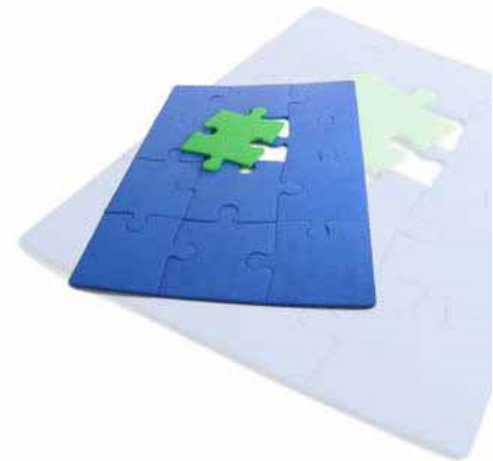
- Don't integrate for the sake of integrating
- Don't pass data and store it just because it's possible
- Define succinct integration requirements necessary to support business processes and use those requirements to build integrations.
- Integrations should be driven by business requirements. Business requirements should not be driven by integrations.



# Integration Best Practices

## Understand data origins and destinations

- Create Technical Design and Data Flow documentation
- Know where data originates and where it ultimately needs to be
- If data is update here, does it also need to be updated there?
- Be mindful of data origins and destinations when designing your integrated solution.
- Build a data map and keep it up-to-date.



## Integration Best Practices

### **Integrations should enable a superior customer experience**

- Pass Through Authentication means the customer logs in once and doesn't maintain two sets of login details.
- Screen pops decrease call handle times, save you money and make you look good while the customer is on the phone.
- Give agents a 360 degree view of the customer
- Knowledge at your fingertips



# Integration Best Practices

## But what if...

- Plan for the unexpected
  - Unsuccessful HTTP POST
  - Site Down
  - Internet Failure
  - Failure to process records in a CSV file
- Build custom reports or utilize existing tables (e.g., integratio to monitor integrations
- Send notifications, automate retry events, manual intervention
- Back up files for re-transmission where appropriate



## Integration Best Practices

### It's all about timing & size

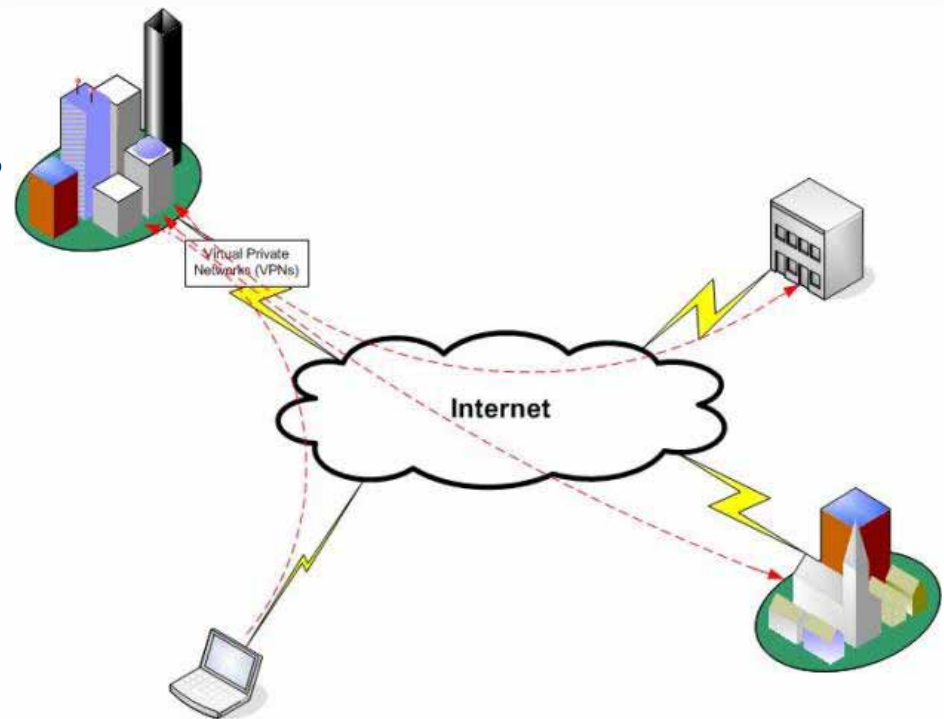


- Does data need to be kept up-to-date in real time? If yes, utilize real-time integration methods. If not, take the batch route and go nightly.
  - RightNow Connect
  - XML API
  - HTTP POSTs, SOAP APIs, Web Services
- How large is the data set? Real-time is not always the best approach

# Integration Best Practices

## Security and transport

- Does the data warrant security (e.g. Credit Card Numbers)
- What level of security is required?
  - HTTPS, encryption (PGP, 3DES), sFTP, VPN
- Consider security in the design phase, not the Go-Live
- Changes take time - put the request in early



## Integration Best Practices

### **Quality testing = quality integration**

- The number 1 reason integrated solutions are not successful is...They were not properly tested!
- Don't skimp on testing! The project doesn't end when the development is [seemingly] complete.
- Build clear and concise test plans, test scripts and use cases.
- Define exit criteria for each integration touch point. Were all the exit criteria met?
- Open lines of communication amongst team members is key.
- Document, document, document.

# Integration Best Practices

## Ask and you shall receive



The screenshot displays the 'Communities' page for RightNow Technologies. The page is divided into three main sections: Customer Community, Developer Community (which is highlighted in green), and Partner Community. Below these sections are links for 'Forum' and 'File Exchange'. The main content area features a large banner for the Developer Community with the text: 'Welcome to the Developer Community! The Developer Community is focused on the needs of customers and partners looking to integrate or customize the RightNow product beyond the standard configurability offered by the product.' Below the banner are three smaller promotional boxes: one for Lexi-Comp, one for Developer Forums, and one for Community File Exchange. The footer includes a 'Visit RightNow.com' button, navigation links (Home, Email Alerts, Contact Info, Privacy Policy, Anti-SPAM Policy, Tell your RightNow Story), and a copyright notice for 2007 RightNow Technologies, Inc.

- Online software development focused community
  - Accessible from [www.rightnow.com](http://www.rightnow.com)
  - Technical topic Forums
  - Technical information dissemination
  - Access to RightNow technical experts
  - Provide a repository for RightNow materials
    - Documentation
    - Coding Examples
    - RightNow Connect for Java and .NET

# Integration Best Practices

## Sometimes you can't do it alone

- In highly complex environments where there are many integration touch points, large amounts of data to be transferred or many applications involved, it could make sense to deploy a middleware application.
- Utilize middleware providers with applications that specialize in EAI (Enterprise Application Integration)
- RightNow integration partners are already fully integrated with the RightNow CRM application (e.g., the RightNow Connect DLL assemblies are already compiled in the Cast Iron application)



# Using Middleware – Cast Iron Systems

## Partner Presentation – Cast Iron Systems





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Chandar Pattabhiram, Vice President, Product Marketing  
Cast Iron Systems

# Agenda

- Integration Appliances Overview
  - What they are
  - What problems they solve
  - When you should choose them for RightNow integration
- Case Studies & Best Practices
- Q & A

# The Cast Iron Integration Appliance

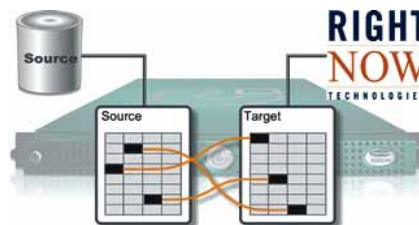
## Purpose-Built for for RightNow Integrations



1 Plug in



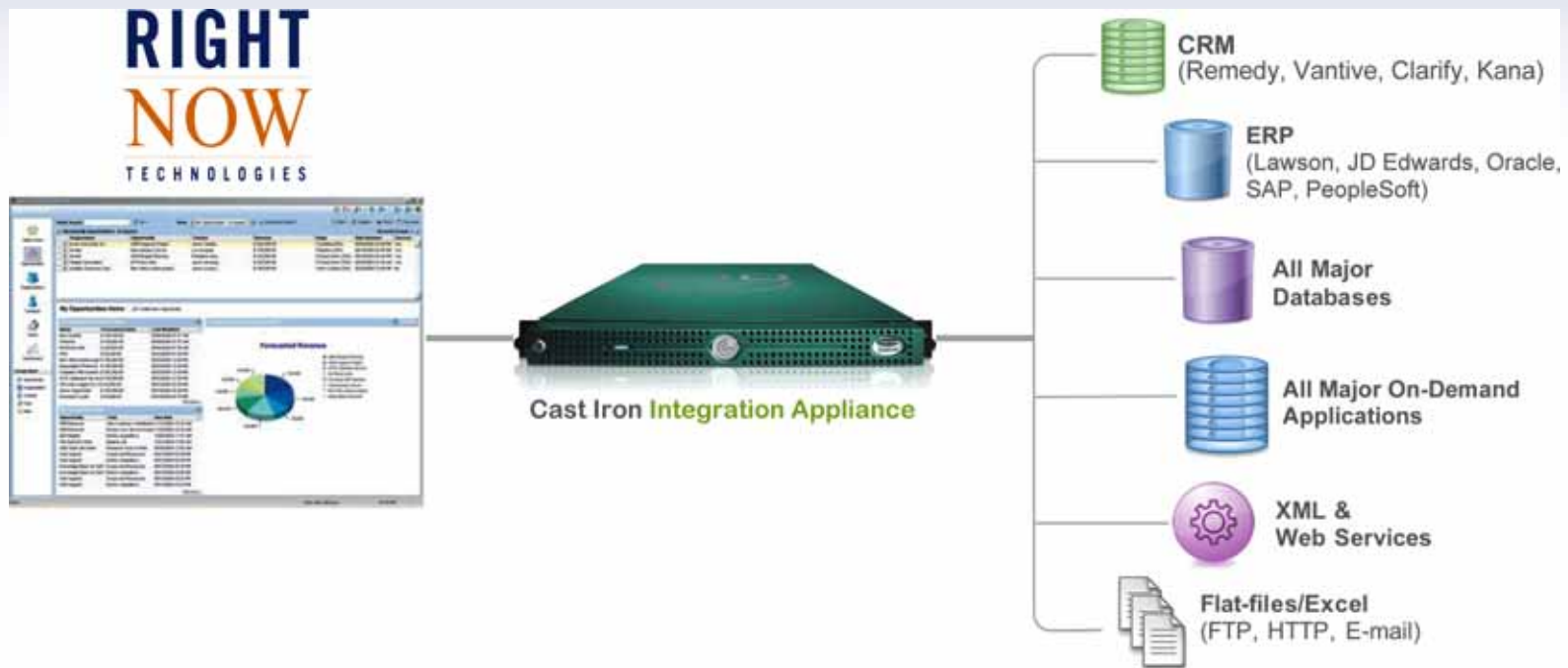
2 Configure



3 Go



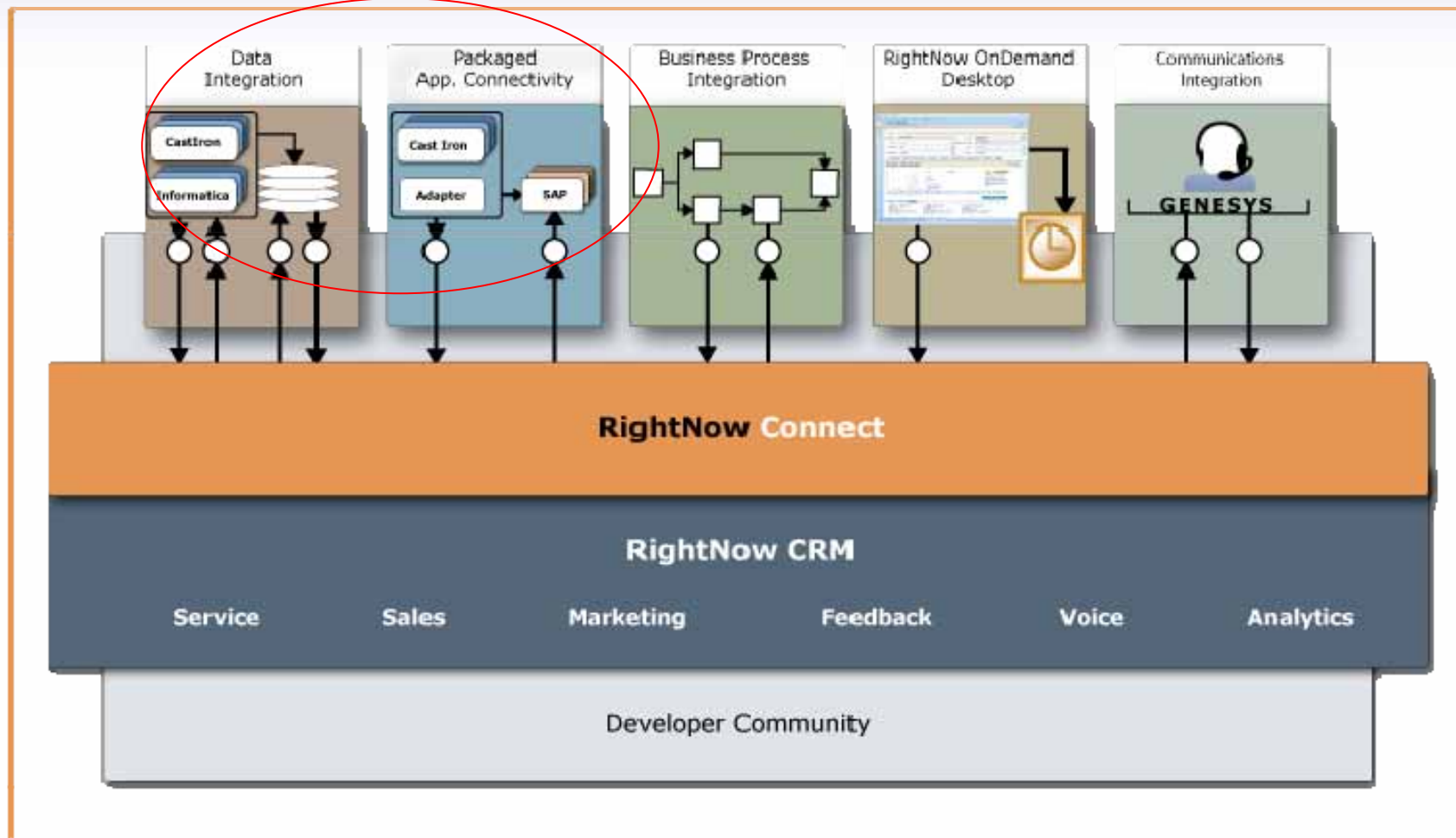
# The RightNow Integration Appliance



- 1 Data Migration
- 2 Real-time Data synchronization with ERP, CRM, Custom Apps
- 3 Data extraction to reporting systems

# RightNow Connect Framework

## RightNow Connect



# Why an Appliance?

## Appliances simplify infrastructure



### Integration Layer

- Application integration
- Integration Appliances
- **Cast Iron Systems**



### Security Layer

- SPAM, Authentication, Firewalls
- Security Appliances
- **F5, Juniper, Barracuda**



### Storage Layer

- Data storage and retrieval
- Storage Appliances
- **EMC, Network Appliances, Sun**



### Network Layer

- Routers, Switches, Gateways
- Routing Appliances
- **CISCO, Juniper, Extreme**



### Hardware Layer

- Servers
- Operating System Appliances
- **Sun, HP, IBM**

# RightNow Appliance Overview

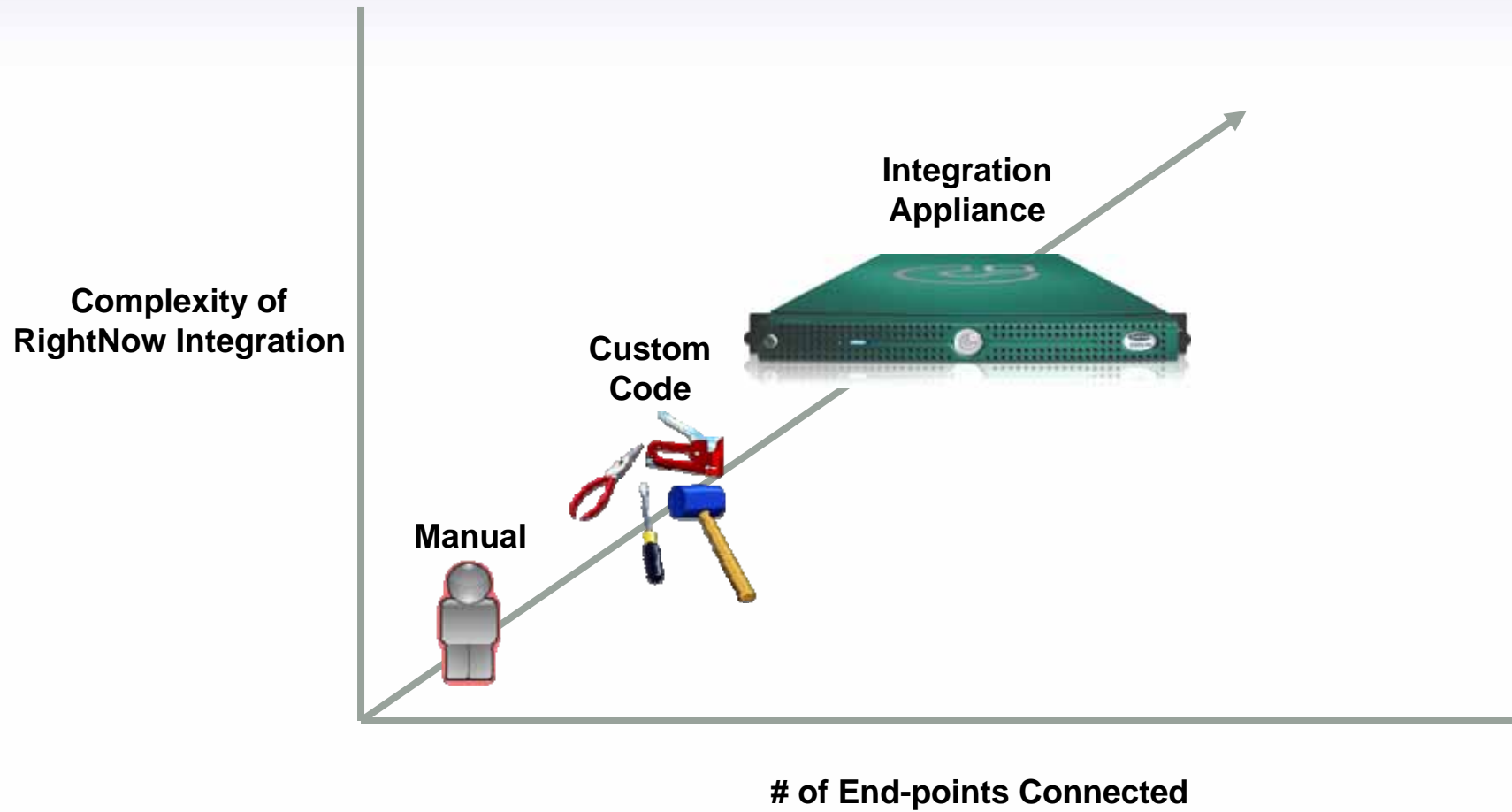
RightNow integration made easy



## What The Integration Appliance Does



# When to Choose An Integration Appliance



# Customer Design Patterns: Applications

## Top 5 Endpoints

Microsoft  
**SQL Server**

**ORACLE**



Flat Files



**Salesforce**

## Other Endpoints



DB2



J D E D W A R D S



SYBASE



Microsoft  
**Exchange**



## Design Patterns: Integration Scenarios

Most Common	Also Seen
<ul style="list-style-type: none"><li>• Trouble Tickets</li></ul>	<ul style="list-style-type: none"><li>• A/R information</li></ul>
<ul style="list-style-type: none"><li>• Warranty and support information</li></ul>	<ul style="list-style-type: none"><li>• License and contract info</li></ul>
<ul style="list-style-type: none"><li>• Customer master &amp; contacts</li></ul>	<ul style="list-style-type: none"><li>• Data migration from older CRM applications</li></ul>
<ul style="list-style-type: none"><li>• Leads, Opportunities sync</li></ul>	<ul style="list-style-type: none"><li>• Order status sync</li></ul>
<ul style="list-style-type: none"><li>• RMA information</li></ul>	<ul style="list-style-type: none"><li>• Product master</li></ul>

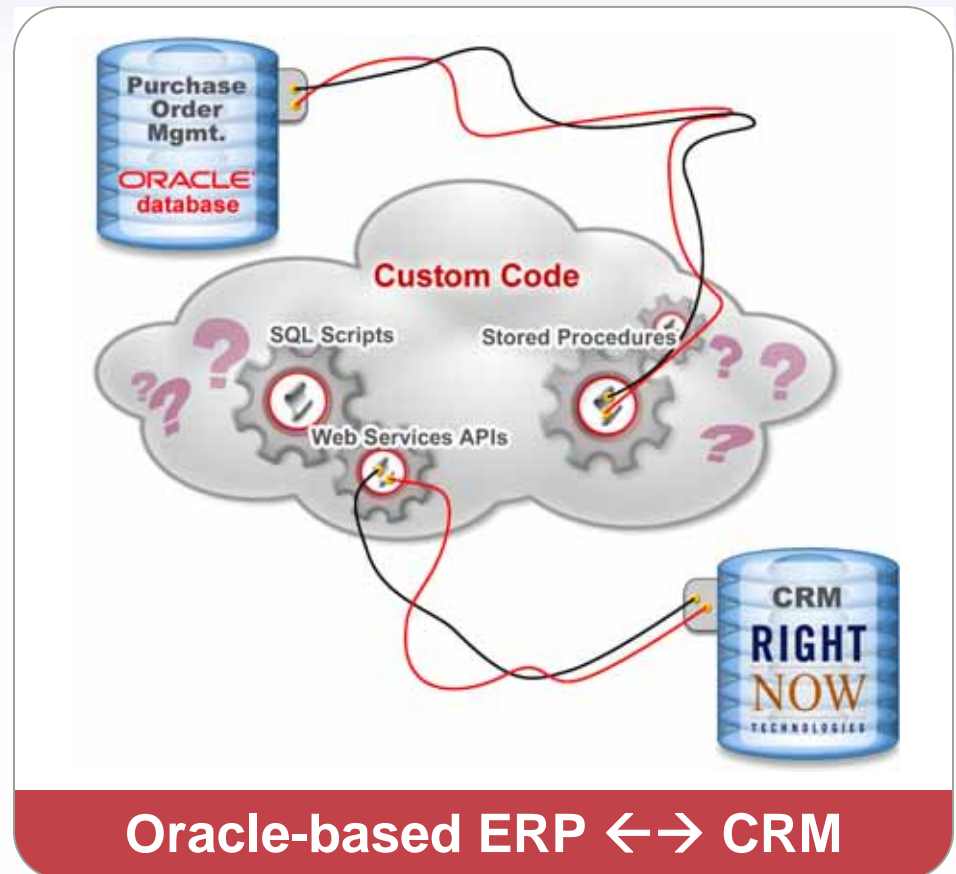
# Case Study Examples

## The Cast Iron Integration Appliance

Company	Description	Systems Connected	Integration Scenario
	Leading security vendor	RightNow, Oracle, Web Portal, EDI	Customers, support contracts, licenses, EDI
	Leading Project-based ERP provider	RightNow, Costpoint, SFA, H/R vendors	Customer, License, A/R sync, benefits data
	Leading Online Survey & Panelist provider	RightNow, SQL Server, Salesforce.com	Panelists, Leads, Opportunities, Support
	Online recruitment marketplace	RightNow, Netsuite, DB	Shop-floor Integration

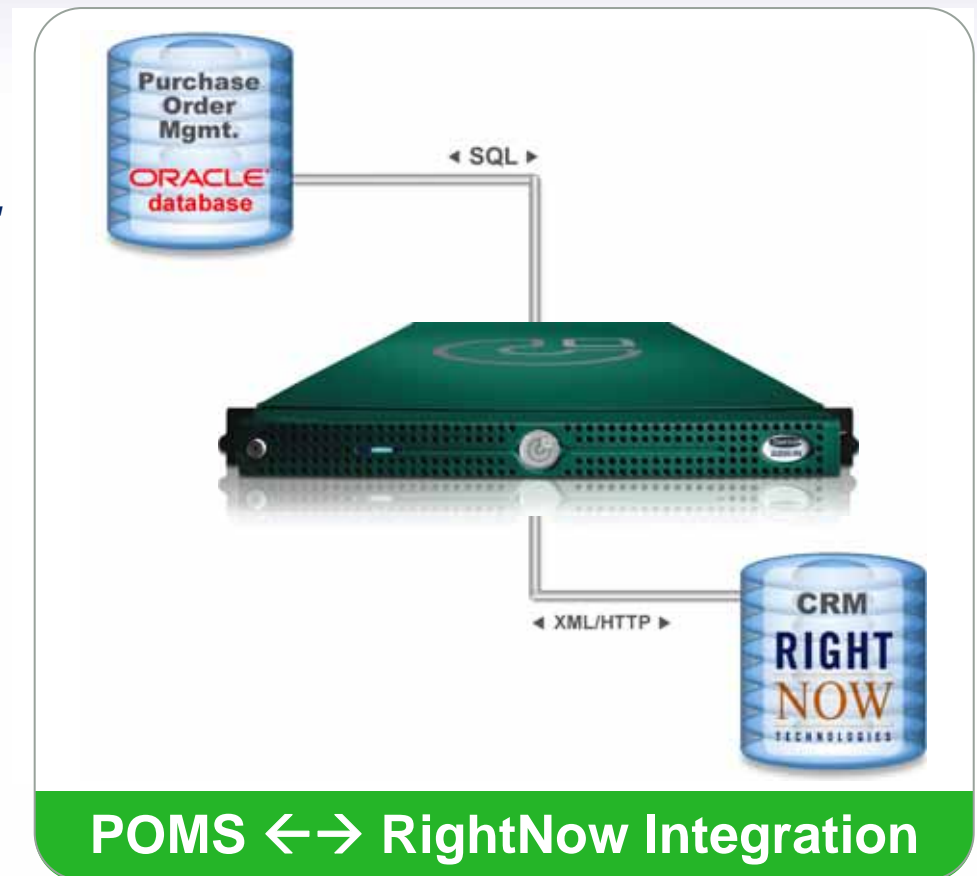
## PGP Integration Requirements

- Migrating from home-grown CRM to RightNow
- Customers & orders created in Order Mgmt system (POMS)
- Integration needs:
  - Customer master migration from legacy
  - Customer support info from POMS to RightNow
- Strict project deadlines



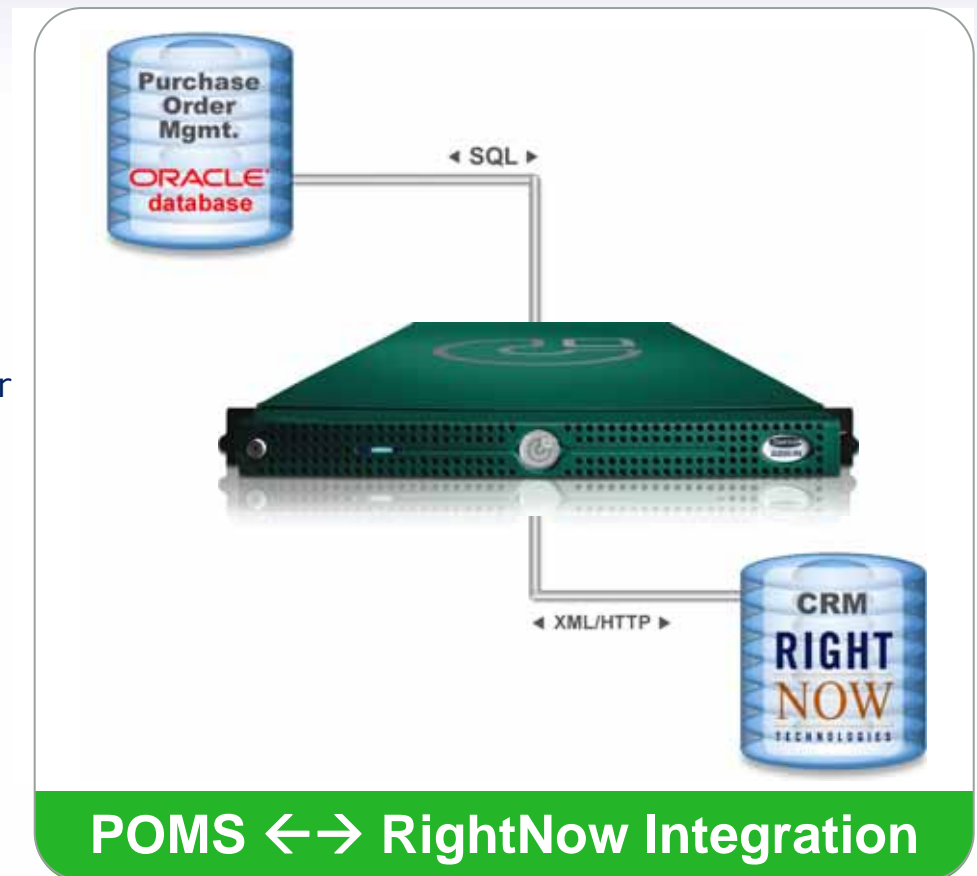
## Cast Iron Integration Appliance: Solution

- Simple Experience
  - Out-of-the-box installation
  - Configuration, not coding
  - Focus: “solving business problem, not technology”
- Deeply technical skills not required
- Functionality:
  - Connectivity, data mapping, workflow rules
  - Extract support data from POMS (SQL)
  - Update RightNow in real-time using XML/HTTP



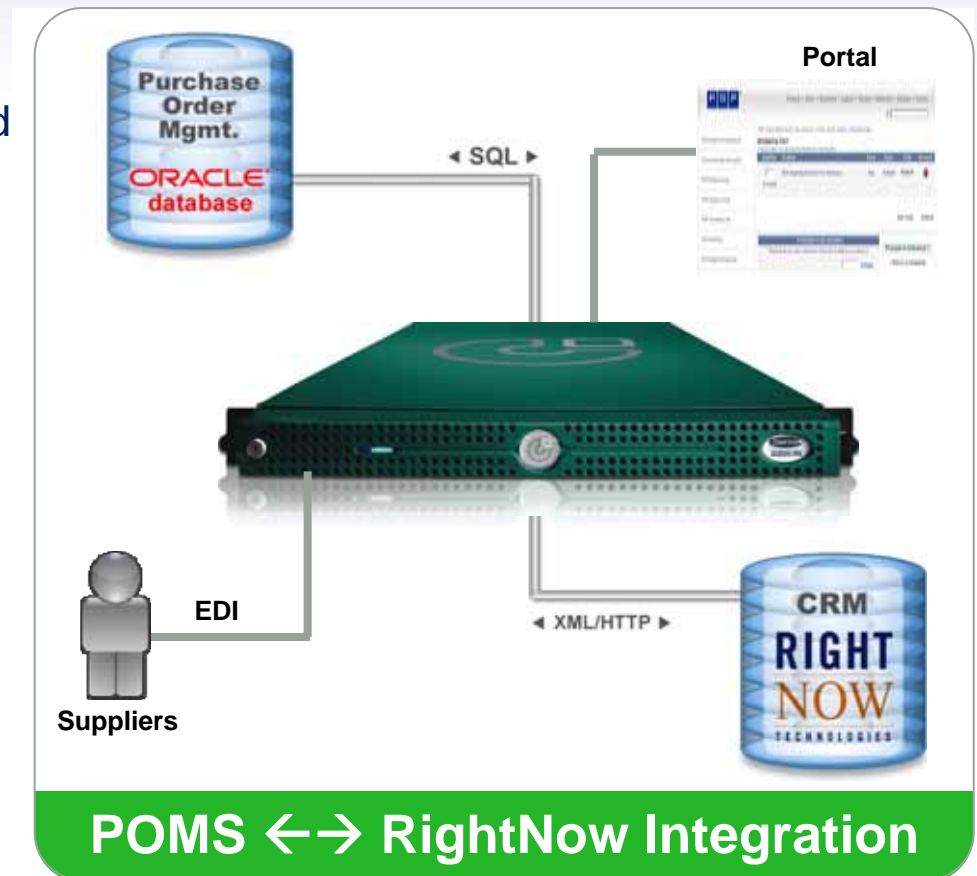
# Best Practices Approach

1. Began with end in mind
2. Requirements drove design
3. Understood origins & destinations
  - Oracle, RightNow (bi-directional)
4. Integration enabled superior customer experience
5. But what if...
  - Configured Alerts & Notifications
6. Real-time, medium-sized loads
7. Quality testing: Unit, System and End-user testing
8. Cast Iron helped implement solution
  - Completed in 3 weeks



## Cast Iron Integration Appliance: Results

- Results:
  - POC completed in 1.5 days
  - 5 days of configuration replaced 5 weeks of custom coding
  - No code written
  - Self documenting
- Building on initial success
  - EDI with suppliers
  - License data integration
  - Portal Integration

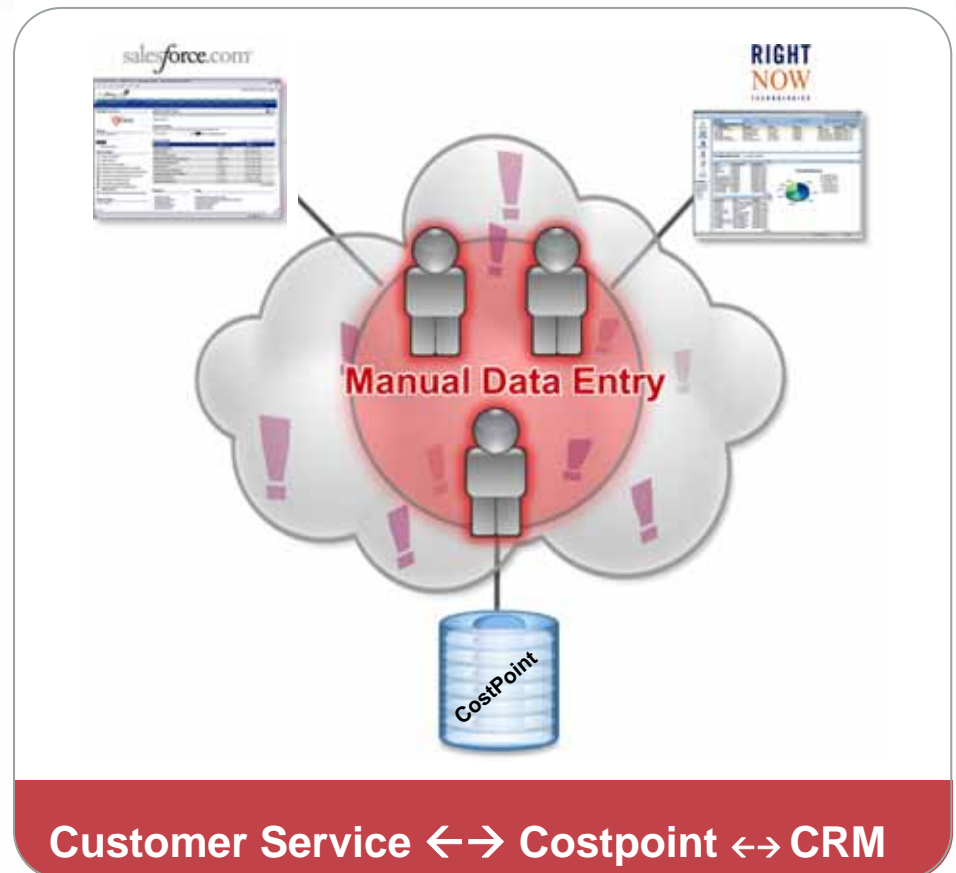


## Case Study: License tracking

### Deltek: Enterprise Management Software Provider

#### Business Problem

- Manual data entry
  - ERP, SFA, CRM, LMS, HR
  - Redundant data entry
  - Duplication errors
- Data Synchronization needs:
  - Software licenses
  - Contacts and customers
  - A/R info
- Seeking Simple Integration Platform

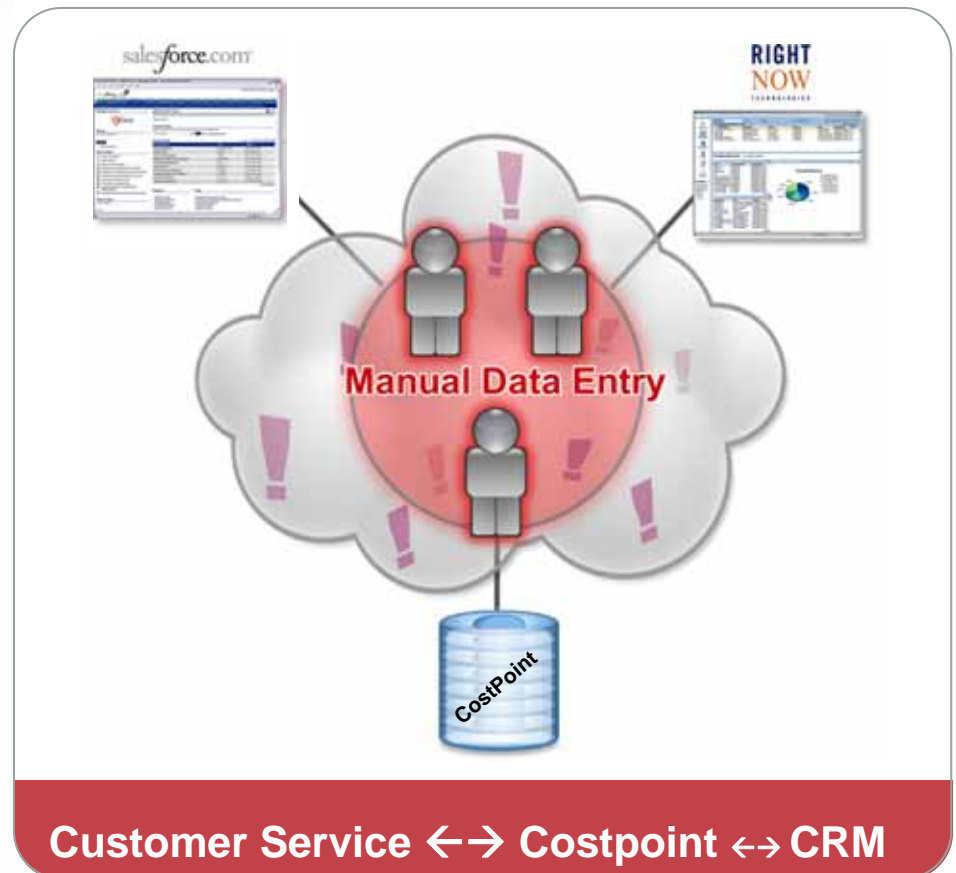


## Case Study: License tracking

### Deltek: Enterprise Management Software Provider

#### Options Evaluated

- Custom code
  - Not scalable
  - Takes too much time to change
  - Lack of visibility into errors
- Complex integration software (Cogility, Sonic)
  - Expensive
  - Too many moving parts
  - Time consuming
- Appliances
  - Simple
  - New technology



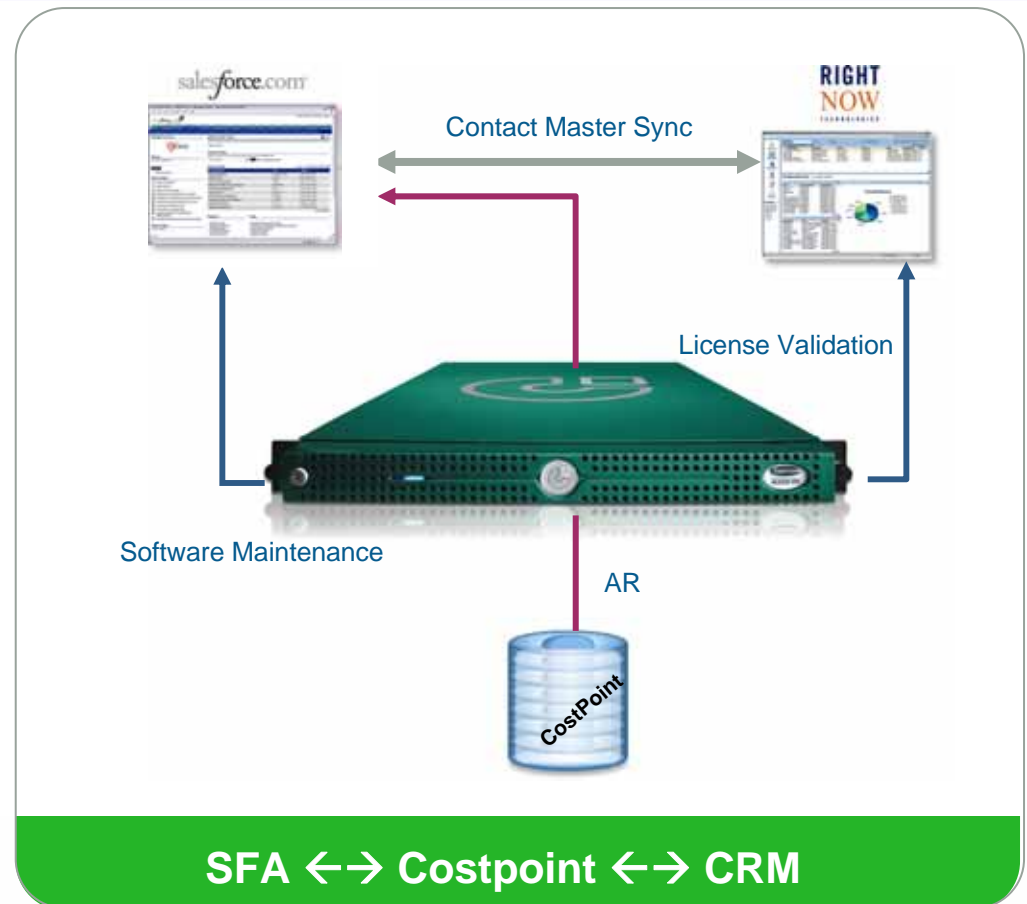
# Case Study: License tracking

## Deltek: Project completed in 4 weeks

### Solution

- Replaced HR integration (XML, SQL)
- *Multiple point integration across:*
  - CRM (XML)
  - SFA (Web Services)
  - Costpoint Financials (SQL)
- Licenses, customer, A/R, maint. Data sync
  
- **Project completed within 4 weeks**
  - \$100K labor savings,
- Single “No Coding” platform for all needs  
Using Cost Iron for Subscription systems

### Results



## Summary: Integration Appliances

- Purpose-built for RightNow Integrations
- Platform for your integration needs
- “Configuration, Not Coding” approach



Thank You

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# The Design Goal

**Simplicity**



**Just Like...**



**RIGHT  
NOW**  
TECHNOLOGIES

REACHING NEW HEIGHTS IN CUSTOMER EXPERIENCE

  
SUMMIT 07

We'll be happy to answer your questions...

