



REACHING NEW HEIGHTS IN CUSTOMER EXPERIENCE



RightNow Feedback

Solution Overview

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Agenda

- **RightNow Feedback Customers**
- **Feedback Solution Overview**
- **Product Demo**
- **What's new in RightNow 8.2**
- **New Release Cycle Process and Roadmap Preview**

RightNow Feedback Product Evolution

- RightNow Metrics was first introduced in RightNow 3
 - Primarily used for closed incident surveys
 - Separate from RightNow database
 - No integrated analytics
- RightNow Feedback introduced with RightNow 8
 - Fully integrated across the suite
 - Built-in branching logic
 - Leverage marketing for execution

RightNow Feedback



REACHING NEW HEIGHTS IN CUSTOMER EXPERIENCE





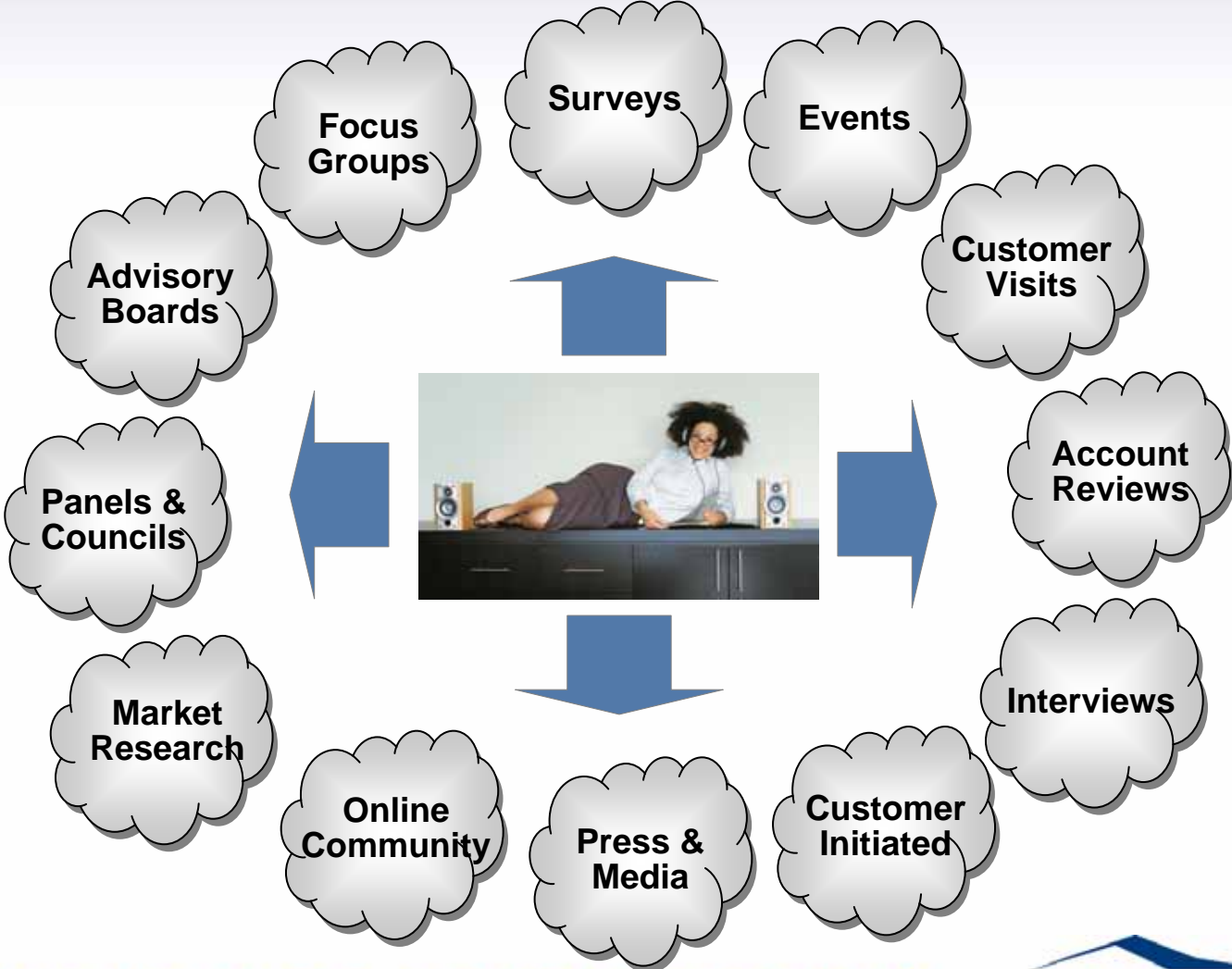
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Market Trends

Voice of the Customer

Customer feedback is captured in various forms ...



Voice of the Customer

... and across several interaction channels

- Web
- Email
- Phone
- In-store / kiosk
- Regular mail
- Fax
- IM
- Paper



- In-person
 - Privately
 - Electronically
 - Remotely
-
- Company-initiated
 - Customer initiated
 - Inbound
 - Outbound

Feedback management solutions provide an effective means to capture the customer voice across mass audiences and broad interaction channels

Industry Trends in Feedback

Feedback management is emerging as a strategic imperative

Traditional

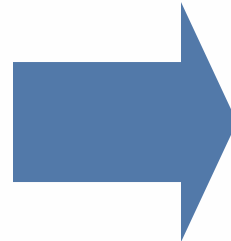
Organizations outsourced feedback processes or built disparate in-house survey tools

- Multiple survey tools were developed across the enterprise ...

With little coordination of data

- Costs of supporting multiple survey applications proliferated ...

Peaking organization interest in finding more efficient and cost effective survey solutions



Today

Organizations are strengthening their focus on strategic feedback management

- Improving the customer experience has risen to a board-level focus
- Organizations are learning more from their customers

- The number of channels through which feedback is collected has expanded

- Web, email, IM
- IVR, voice, call recording
- Paper, partners

- The number of users and departments using feedback has increased

Typical Feedback Challenges

Customers are inundated with multiple surveys, leading to

- Low response rates for future:
 - Surveys and feedback
 - Marketing campaigns
 - Market research
 - Response requests
- Message saturation
- Reduced goodwill

Inability to understand and act immediately on customer voice

- Cannot meaningfully analyze and synthesize feedback to make it actionable and impactful
- Insufficient ability to route feedback quickly and accurately
- Stale data provides dated and misleading insight

Too many survey solutions

- Disparate, uncoordinated, siloed survey solutions across the organization
- Not cost effective
- Inconsistent use of business processes and best practices

Ineffective results

- Results arrive too late to be meaningfully acted upon when it matters most to the customer
- Lack of integration with other corporate and customer data provide less strategic and less consistent insight

The Dilemma

How Do You...

Capture and Act on
Customer Feedback

- ✓ Across functions
- ✓ Across channels
- ✓ Internally and externally

while

Controlling or
Reducing Costs?

- ✓ Single survey system
- ✓ Process consistency
- ✓ High response & ROI



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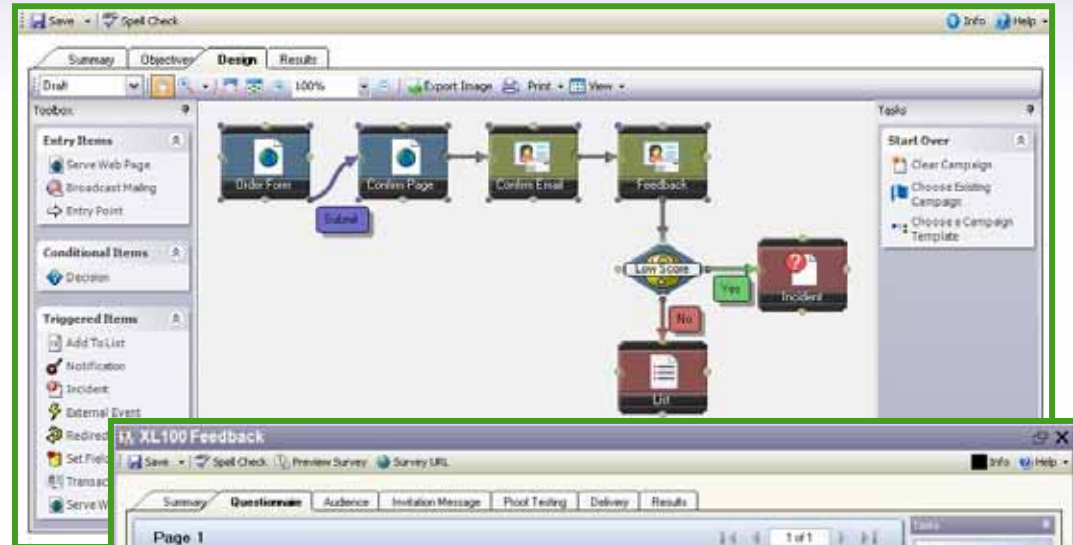
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RightNow Feedback Solution Overview

RightNow 8 Feedback

Proactively sense and respond to the customer voice ...

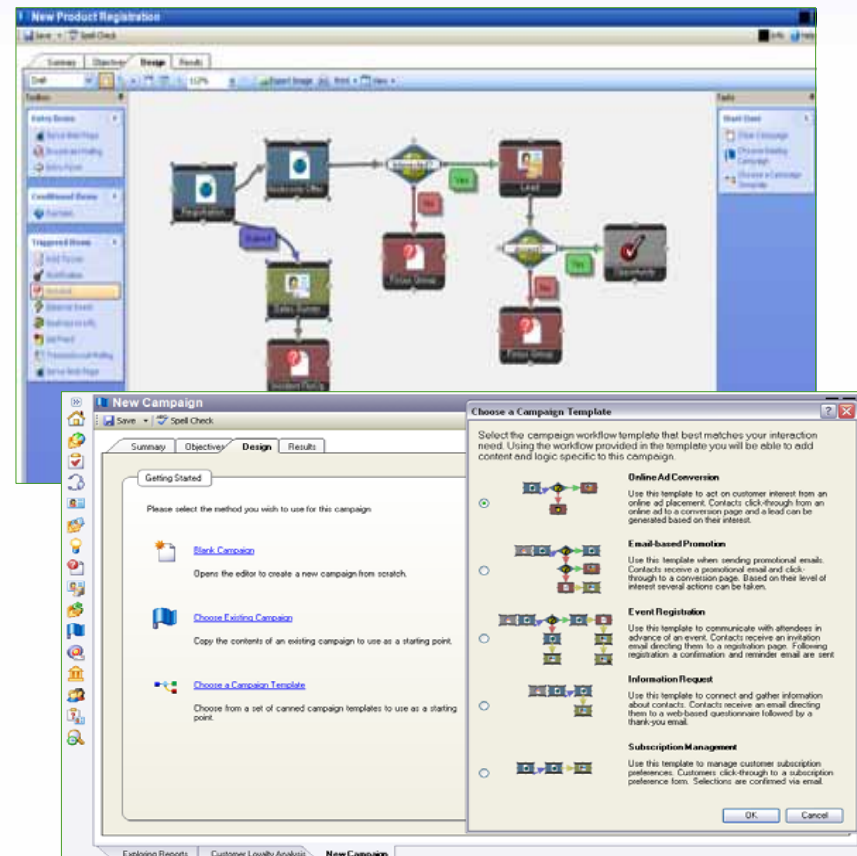
- **Capture feedback across all customer touch points**
- **Automate follow-up and analysis**
- **Pre-built feedback templates**
 - Customer advocacy management
 - Customer satisfaction monitoring
 - New product development
 - Employee feedback



Design feedback into the experience

Proactively solicit feedback everywhere your customer is

- Easily integrate surveys into the customer's sales, service, and marketing experiences
- Create survey invitation campaigns
- Supports complex branching logic
- Extend survey opportunities to other audiences
- Use survey tool capabilities for other purposes



RightNow Voice Survey Management

Capture the customer's voice—literally—with voice surveys

- **Conduct automated surveys over the telephone using speech recognition**
 - Ask survey questions audibly in customer's natural language
 - Capture feedback literally from the customer's own voice
 - Support for several question types, including "open-ended" questions that ask for recorded comments
- **Route customer to voice survey after caller accesses a service (e.g. after calling for an incident update)**
- **Invite customers to provide feedback with inbound voice surveys (e.g. "800" number)**
- **Proactively solicit feedback with outbound voice surveys and automated dialing**



Embedded Processes & Best Practices

RightNow embeds end-to-end feedback processes into its solution

Target Design Test

- Feedback strategy
- Audience targeting and segmentation
- Touch management
- Survey questionnaire design
- Invitation message development
- Proof testing

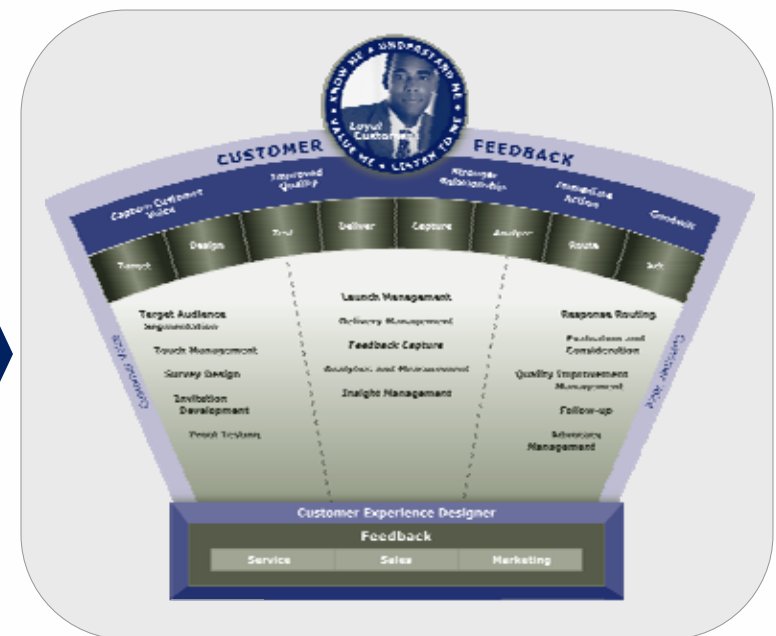
Deliver Capture Analyze

- Launch and delivery management
- Feedback capture
- Feedback analytics

Route Act

- Response routing and action

Voice of the Customer



The RightNow Feedback Solution

Feedback Strategy

Use the right survey method to solicit the most useful feedback

- **Broadcast surveys**

- Survey a broadly targeted audience via email invitation at a chosen time
- Capture feedback over the web about any targeted subject

- **Transactional surveys**

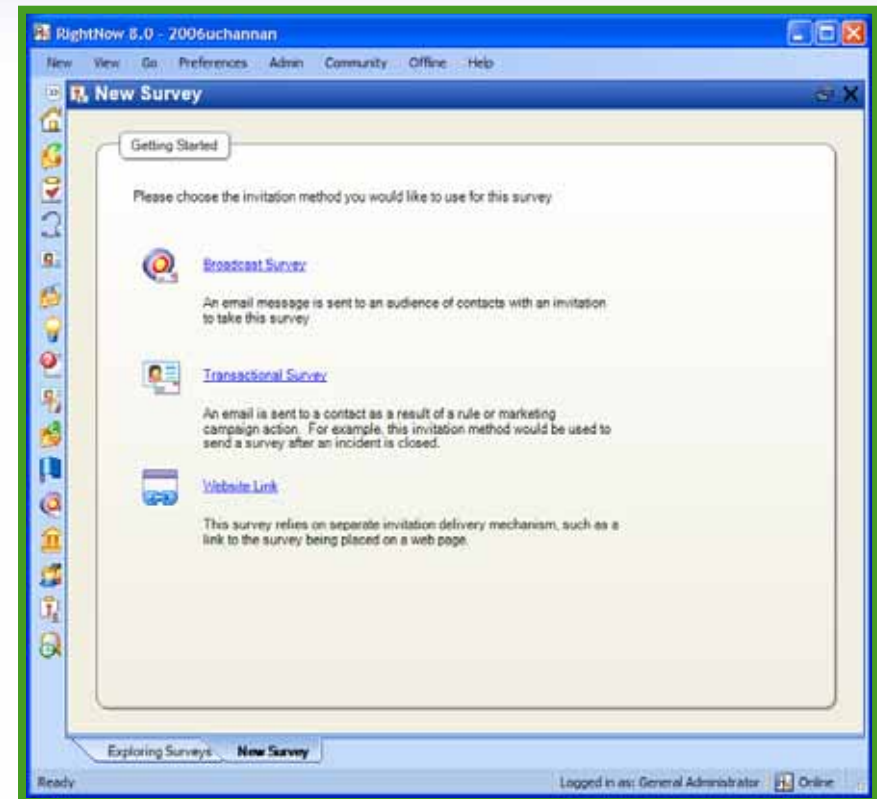
- Automatically capture feedback over the web following an event, transaction, condition, or customer action
- Typically targeted to one individual after a particular transaction (e.g. closed incident)

- **Website link surveys**

- Survey individuals visiting a web page
- Web page can be linked to from any source (e.g. shopping cart)

- **Voice-enabled surveys**

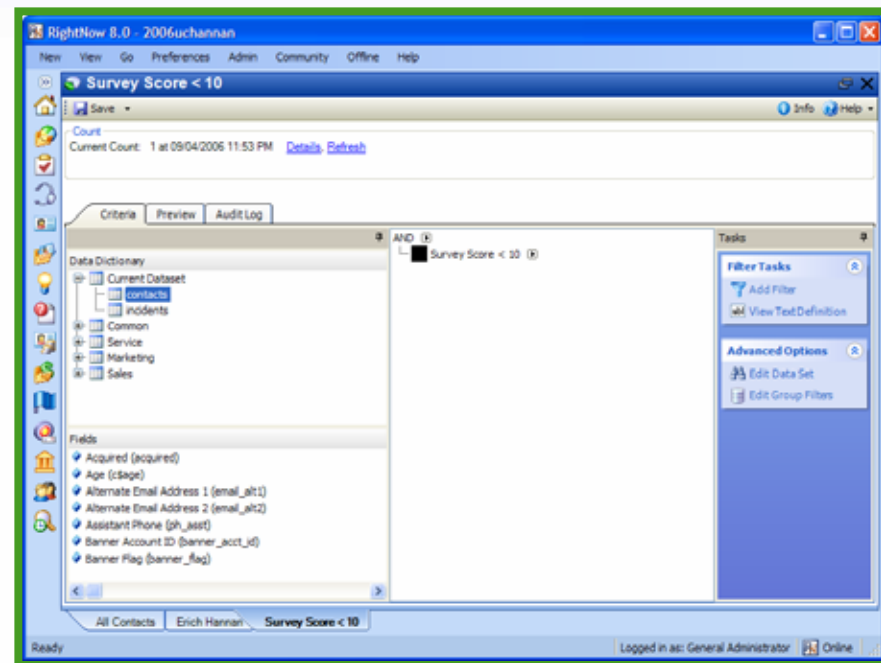
- Conduct automated inbound or outbound surveys via phone with speech recognition
- Leverages RightNow Voice



Audience Targeting and Segmentation

Strategically identify and segment target audience

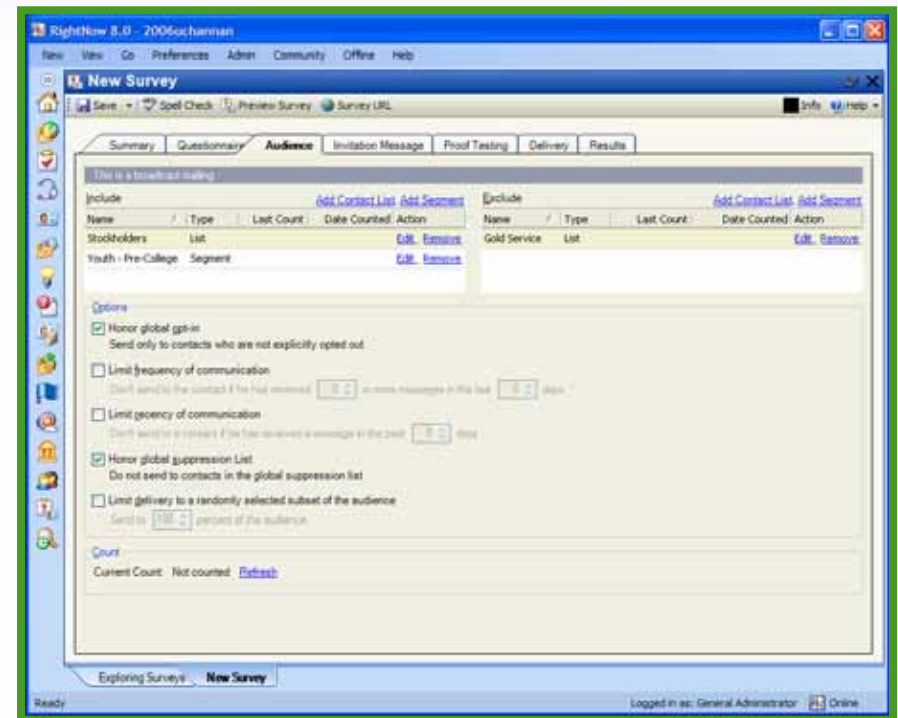
- **Identify and structure target audiences on-the-fly**
 - Advanced multi-dimensional audience segmentation
 - Use conditional and Boolean operators
 - Leverage survey responses for segmentation and targeting
- **Use pre-existing lists for faster survey development**
 - Use lists or segments from RightNow Marketing and RightNow Feedback
 - Use lists from 3rd-party tools
- **Define sophisticated segments quickly and efficiently**
 - Build “super-segments” by including and excluding other lists



Touch Management

Keep your best customers loyalty by tightly managing touches

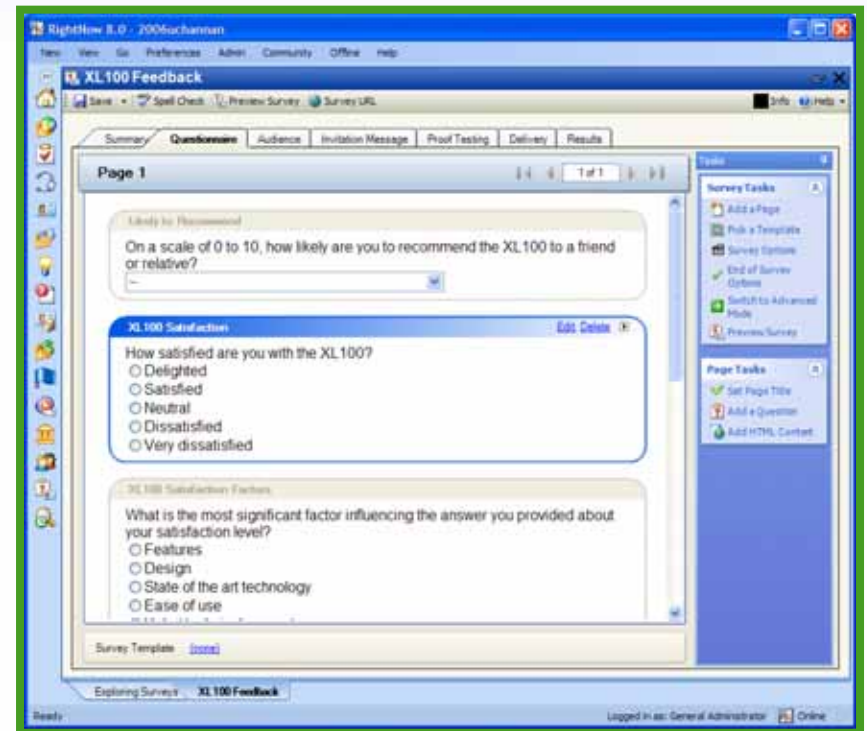
- Honor global opt-in and opt-out lists to maintain customer goodwill
- Honor global suppression lists to meet regulatory compliance and customer expectations
- Use recency and frequency analysis of prior outbound communications to avoid over-surveying customers
- Experiment on live audience to achieve maximize response rates
 - Find the most effective messaging
 - Send randomly selected sub-segments test surveys to measure audience behavior and response rates
 - Send best survey to larger audience



Survey Questionnaire Design (1 of 3)

Design relevant, attractive surveys to maximize response rates

- Graphical survey design tool
- Create rich HTML surveys or simple text surveys
- Multiple question types
- Intuitive drag-and-drop survey design
- Survey question library
- Multiple survey pages



Survey Questionnaire Design (2 of 3)

Use advanced design capabilities for higher survey sophistication

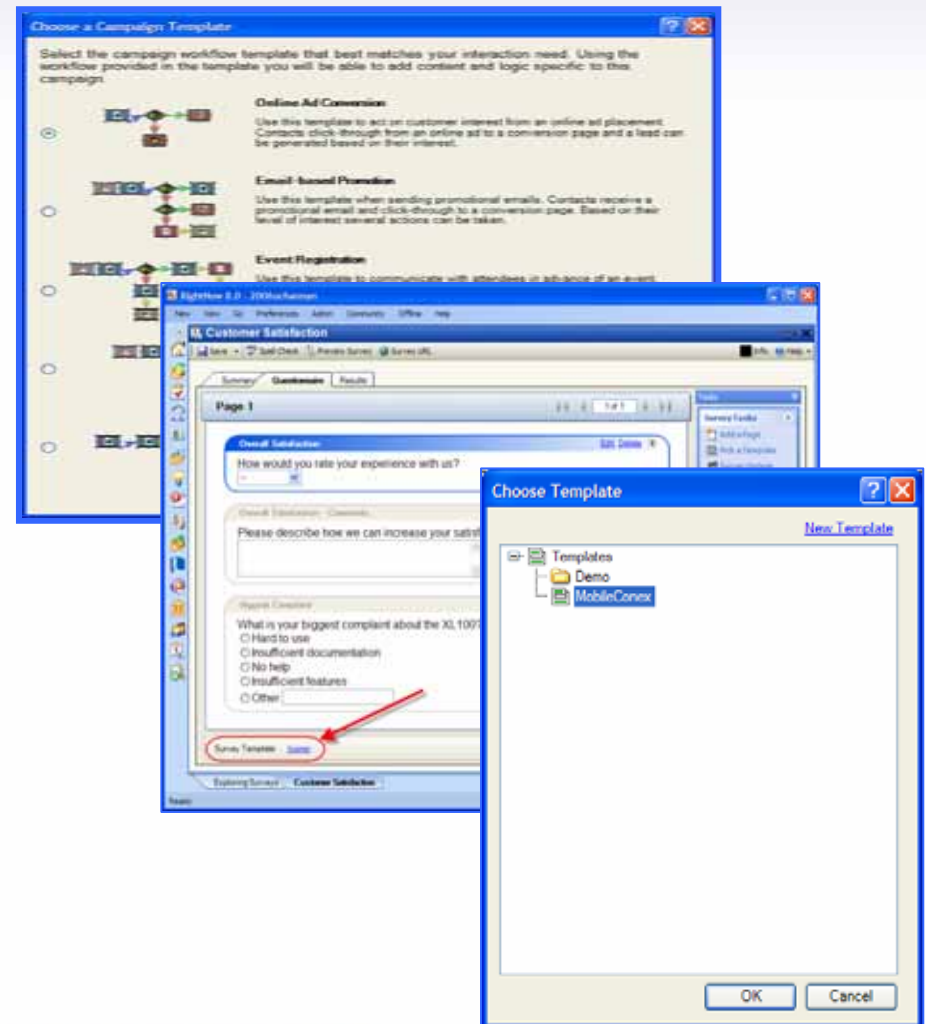
- Basic mode and advanced mode offers varying levels of design sophistication
- Use question branching logic to dynamically choose questions in real time based on answers to prior questions
- Leverage graphical workflow editor to specify flow of survey branches and decision points
- Designate end-of-survey actions to ensure feedback is immediately routed and acted upon
- Leverage advanced questionnaire editor for special surveys and question types



Survey Questionnaire Design (3 of 3)

Deploy surveys rapidly and consistently with pre-built templates

- **Leverage pre-built templates to gather, monitor, and act on common feedback processes**
 - Customer advocacy management
 - Customer satisfaction monitoring
 - New product development
 - Employee feedback
- **Accelerates time from survey design to execution**
- **Reduces survey design and development costs**
- **Maintains consistent look and feel from one survey to the next**



Invitation Message Development

Increase survey response rates with compelling invitations

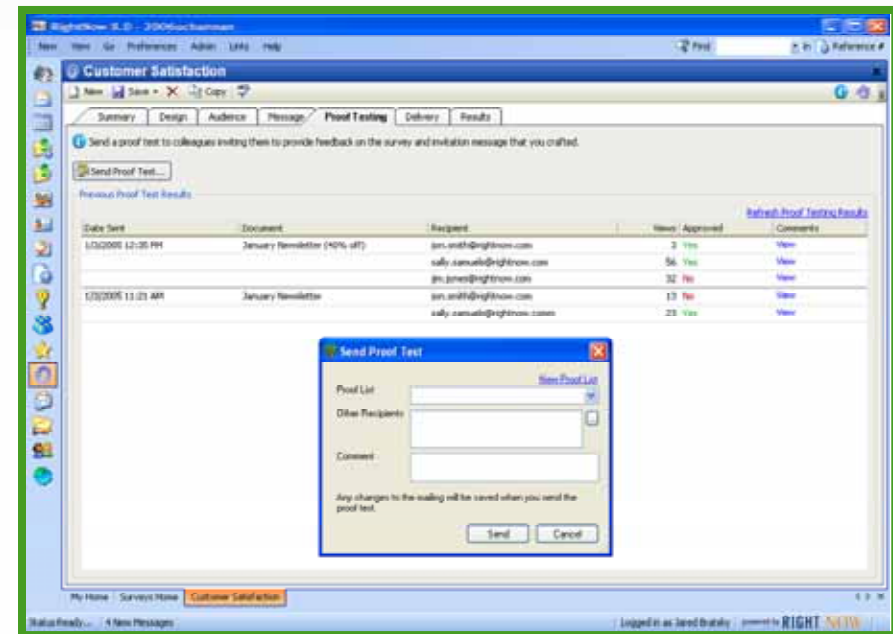
- Create rich, attractive survey invitations messages with full HTML message editor
 - Use word-processing functions or special tools to create HTML in Design mode
 - Enter HTML directly into editor using Source mode
- Create text-only invitations for recipients limited to viewing plain text emails
- Easily preview message with Preview Mode. Quickly switch back to make edits as needed.
- Create content from scratch, re-use existing content, or use a pre-defined template



Proof Testing

Avoid surprises by testing survey internally before launch

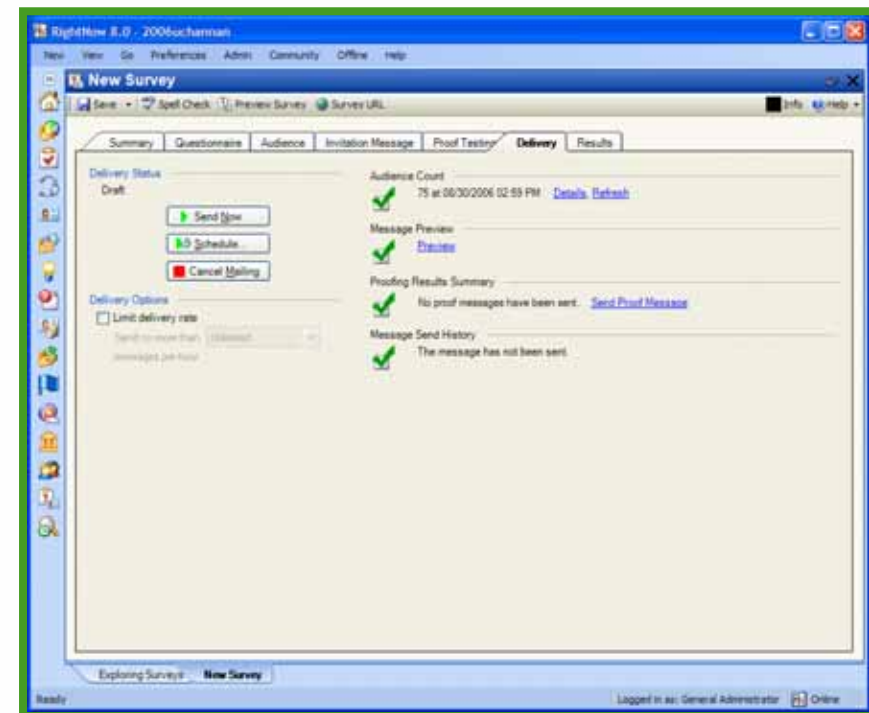
- Ensure survey is “good to go” by sending it to a designated internal audience for final review
- Validate that survey content, look and feel is correct
- Route survey to executives for formal sign-off, review their comments, and track sign-off status
- Define and manage proof testing audience list



Launch & Delivery Management

Closely control survey launch and invitation delivery

- **Closely control survey execution to deliver surveys to the right audiences at the right time**
- **Broadcast surveys**
 - Send survey invitations immediately via email while regulating delivery flow
 - Schedule delivery for future
 - Suspend delivery in real time (e.g. to make mid-course corrections), then restart
 - Cancel delivery
- **Transactional surveys**
 - Automatically send survey invitations based on triggered events
- **Website link surveys**
 - Always available on live web page



Feedback Capture

Take the audience's "feedback fingerprint" in real time

- **Achieve immediate action with immediate feedback capture**
 - When it matters most to the customer
- **Manage feedback strategically by consolidating all survey responses captured**
 - Across all channels
 - Across all touchpoints
 - For all departments and functions
 - For all surveys responded to
- **Integrate feedback into one common knowledge repository**
 - Achieve deep, consistent, and accurate multi-dimensional analysis
 - Synthesize responses meaningfully
 - Combine with other corporate data
- **Link feedback to customer profiles**
 - Better manage specific customers and accounts

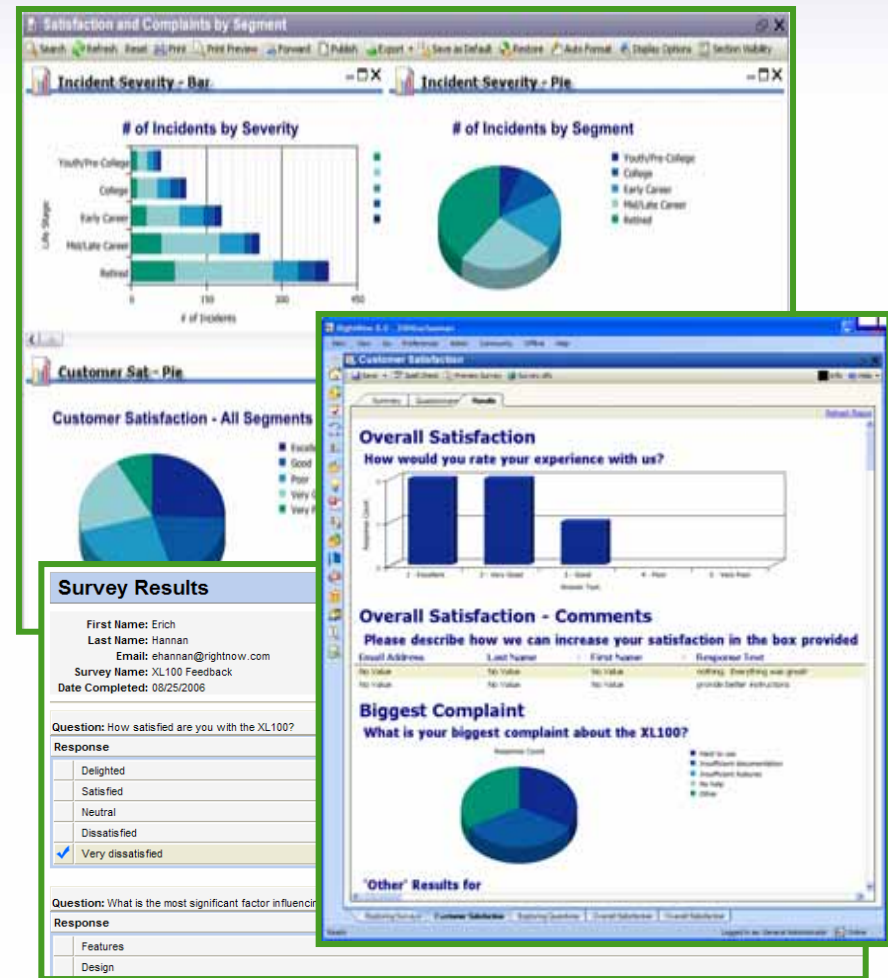
Survey Results	
First Name: Erich	
Last Name: Hannan	
Email: ehannan@rightnow.com	
Survey Name: XL100 Feedback	
Date Completed: 08/25/2006	
Question: How satisfied are you with the XL100?	
Response	Score
<input type="checkbox"/> Delighted	1
<input type="checkbox"/> Satisfied	
<input type="checkbox"/> Neutral	
<input type="checkbox"/> Dissatisfied	
<input checked="" type="checkbox"/> Very dissatisfied	
Question: What is the most significant factor influencing the answer you provided about your satisfaction level?	
Response	Score
<input type="checkbox"/> Features	0
<input type="checkbox"/> Design	
<input type="checkbox"/> State-of-the-art technology	
<input type="checkbox"/> Ease	
<input checked="" type="checkbox"/> Help	
<input type="checkbox"/> Other	
Question:	
Response:	
<input type="checkbox"/> More	
<input type="checkbox"/> Better	
<input type="checkbox"/> More	
<input checked="" type="checkbox"/> Better	
<input type="checkbox"/> Impr	
<input type="checkbox"/> Other	
Totals	
Survey Score	
Questions	



Feedback Analytics

Quickly understand and act upon the customer voice

- Analyze survey responses in real time
- Intelligently synthesize feedback into graphical, understandable trends for immediate follow-through
- Immediately provide knowledge to the right people in the right context
- Combine feedback with complete customer profile and other corporate knowledge for highly strategic analyses
- Easily tailor reports and dashboards with custom analysis design centers
- Leverage pre-built survey reports and dashboards



Response Routing and Action (1 of 3)

Close the feedback loop with immediate follow-through

- **Intelligently act on completed survey with sophisticated routing and workflow rules**
 - Create an Opportunity, Notification, Incident, or Lead
 - Follow-up with recipient or contact
 - Execute external event
 - Modify a record or field
 - Add recipient to a list
- **Route survey results to designated individual or department based on answers or other conditions**
 - Scheduled systematically
 - Triggered by an event or condition
 - Always available immediately ad-hoc
- **Send feedback as granularly or as synthesized as necessary**
 - Send individual responses
 - Send reports
 - Send dashboards
 - Send alerts

The image shows two overlapping software dialog boxes. The background box is titled 'End of Survey Options' and contains a table of actions:

Type	Run	Label
Create Incident	When score is less than 5	
Create Lead	When score is greater than 20	

Buttons for 'Add Action...', 'Edit Action...', and 'Remove' are visible. The foreground box is titled 'Survey Final Action Wizard' and asks 'What the Final Action should do when the Survey is completed'. It lists several options with radio buttons:

- Add the Survey Contact to a List
- Create an Opportunity
- Create a Notification
- Create an Incident
- Create a Lead
- Execute an External Event
- Send an Email to a Contact
- Set a Field Value

Navigation buttons '< Back', 'Next >', and 'Cancel' are at the bottom.

Response Routing and Action (2 of 3)

Leverage contact survey history for contact planning

- Agents and reps can quickly access contact survey response history
- Drill to review individual answers

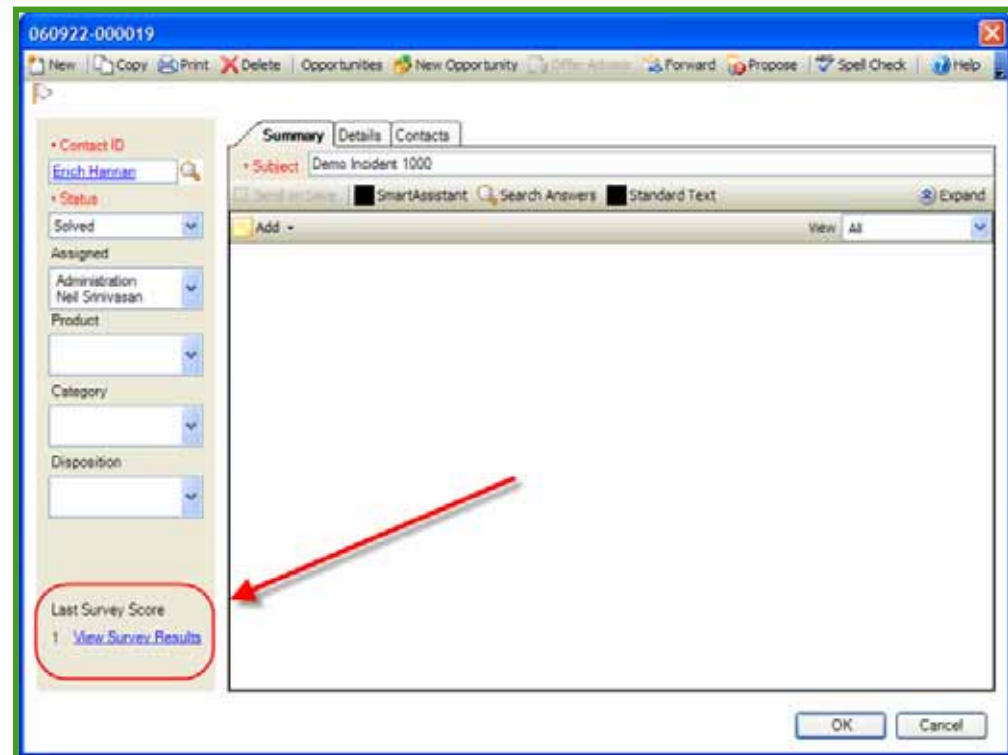
The screenshot displays the RightNow 8.0 - 2006 user interface for contact management. The contact details for Erich Hannan are shown, including fields for First Name, Last Name, Email, Office Phone, Address, Contact Type, State, Organization ID, Salesperson, Title, User ID, Password, Global Opt-in, and SLA. Below the contact details, there is a tabbed interface with 'Surveys' selected. The 'Surveys' tab shows a table of completed surveys for this contact.

Completed	Score	Type	Name	Action
08/25/2006 10:54 AM	7	Web Only	UC Demo - Promoter	View Results
08/25/2006 10:54 AM	1	Broadcast Survey	XL100 Feedback	View Results
08/25/2006 10:54 AM	3	Web Only	Overall Satisfaction	View Results

Response Routing and Action (3 of 3)

Leverage incident survey integration to understand customer

- Results of closed-incident survey integrated directly into originating incident
- Access incident survey results quickly to interact with customer wisely
- Approach selling and other follow-up interactions knowledgeably with complete account survey history





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RightNow Feedback Demo



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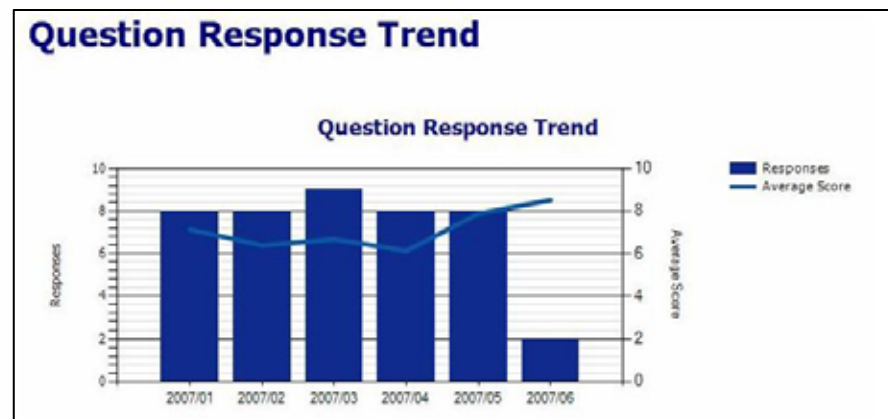
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Announcing Availability of RightNow 8.2

August 27, 2007

Feedback Enhancements

- **Best practice trend reports**
 - Identify improvement or decline trends in areas of interest such as customer satisfaction
 - Aggregate survey scores
 - Text survey emotion detection ratings
- **Emotion detection on text survey answers**
 - Determine the overall emotional sentiment for a particular text survey question.
 - Example: Gauging level of satisfaction with a newly launched product and giving agents a report of negative survey results for follow up based upon strong negative emotional score to gather additional detailed feedback



Analytics Usability Enhancements

- **Shared best practices reports**
 - Business users can create and save public reports
- **Visually highlighted exceptions in reports**
 - Custom images are displayed next to cells in reports to indicate they are above or below pre-determined thresholds.
- **Customizable number of rows on report display**
 - Business users can define the number of items they want to display on each report page
- **Saved filter defaults**
 - RightNow user can save the last filter they used and store it in their personal preferences.
- **Profile access rights reports**
 - Admins can create reports to display profile members and their access to capabilities such as create incident and create survey. Easily find users that have access to a particular capability when changing access rights.

Marketing Enhancements

- **Built in CAN-SPAM compliance tools for email campaigns**
 - Automatically tests email messages for the physical address in the content, a working unsubscribe mechanism, and the customer's opt-out preferences.
 - Provides a visual checklist of other CAN-SPAM compliance tasks that must be confirmed by the user prior to sending.

New Mailing

CAN-SPAM Requirements	Compliance	
System Verified:		
• Must Include Physical Address	✓ Pass	The message includes a physical address content section.
• Must Include a Working Opt-Out Method	✓ Pass	The message includes a global unsubscribe link.
• Must Honor Opt-Out Requests within 10 Days	✓ Pass	The audience options honor global opt-in preferences.
Manually Verified:		
<input checked="" type="checkbox"/> Has Candid Subject Line	✓ Pass	Preview Preview Message Subject: May Newsletter Return-Path: offers@globalwireless.com From: Global Wireless <offers@globalwireless.com> Reply-To: Global Wireless <test@maildv.dv.lan>
<input checked="" type="checkbox"/> Indicates any Adult Content in Subject	✓ Pass	
<input checked="" type="checkbox"/> Indicates Any Advertisement in Subject	✓ Pass	
<input checked="" type="checkbox"/> Has Accurate From and Reply-To Headers	✓ Pass	
<input checked="" type="checkbox"/> Does Not Send to Harvested or Generated Addresses	✓ Pass	
<input checked="" type="checkbox"/> Does Not Send to Domains in FCC Wireless List	✓ Pass	
Overall Compliance	✓ Pass	



REACHING NEW HEIGHTS IN CUSTOMER EXPERIENCE

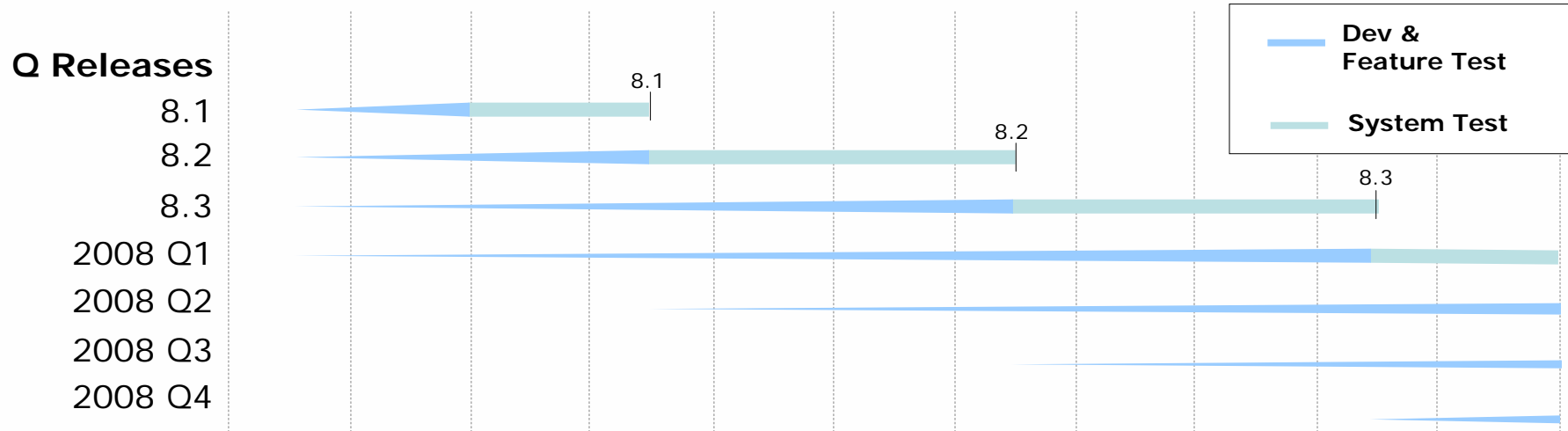
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New Release Cycle Process and Upcoming Release Preview

Solution Development Process Goals

- Receive customer feedback earlier in development cycle
- Get new capabilities to customers more frequently and sooner
- Shorter cycles for reduced risk and increased predictability

The new plan is Quarterly releases



RightNow Solution Roadmap Overview

Release Timeframe

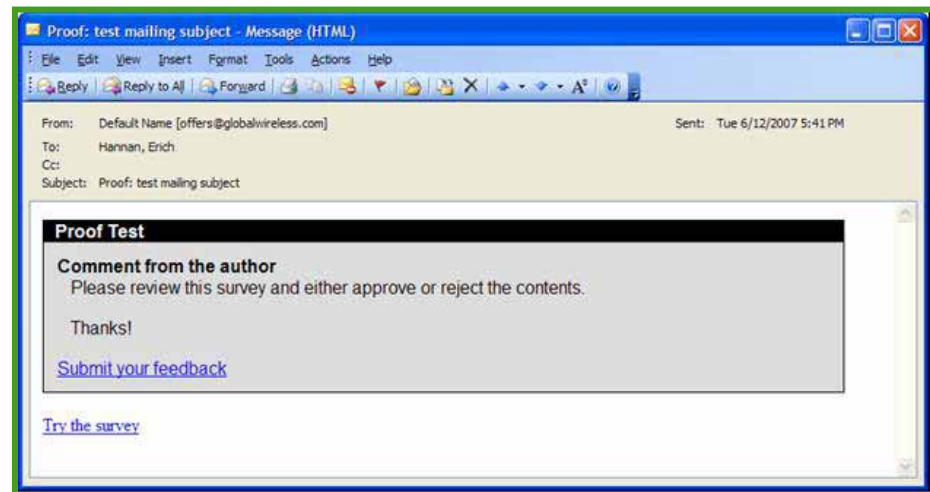
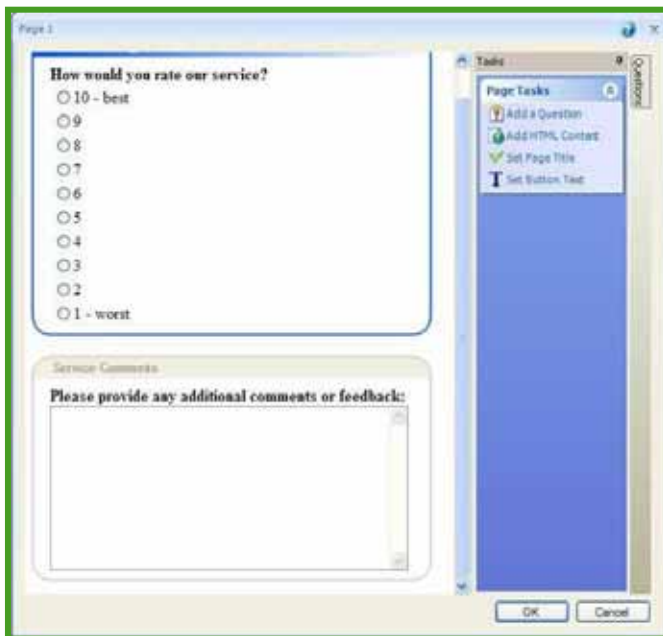
Q4 2007

- End User Page Redesign
- Knowledge Syndication Widget
- Usability Enhancements
 - Analytics
 - Feedback
 - Workspace Designer
- Platform Support
 - Vista Agent Desktop
 - On Premise
 - Linux/MySql 5
 - Linux/Oracle 10g
 - Win2K3/SQL Svr 2005
 - Win2K3/Oracle 10g
- Remote Deployment Support

Feedback/Marketing Usability Improvements

- **Feedback**

- Ability to double-click on page thumbnail in designer to view questions on page
- Ability to proof a web survey



Analytics Usability Enhancements

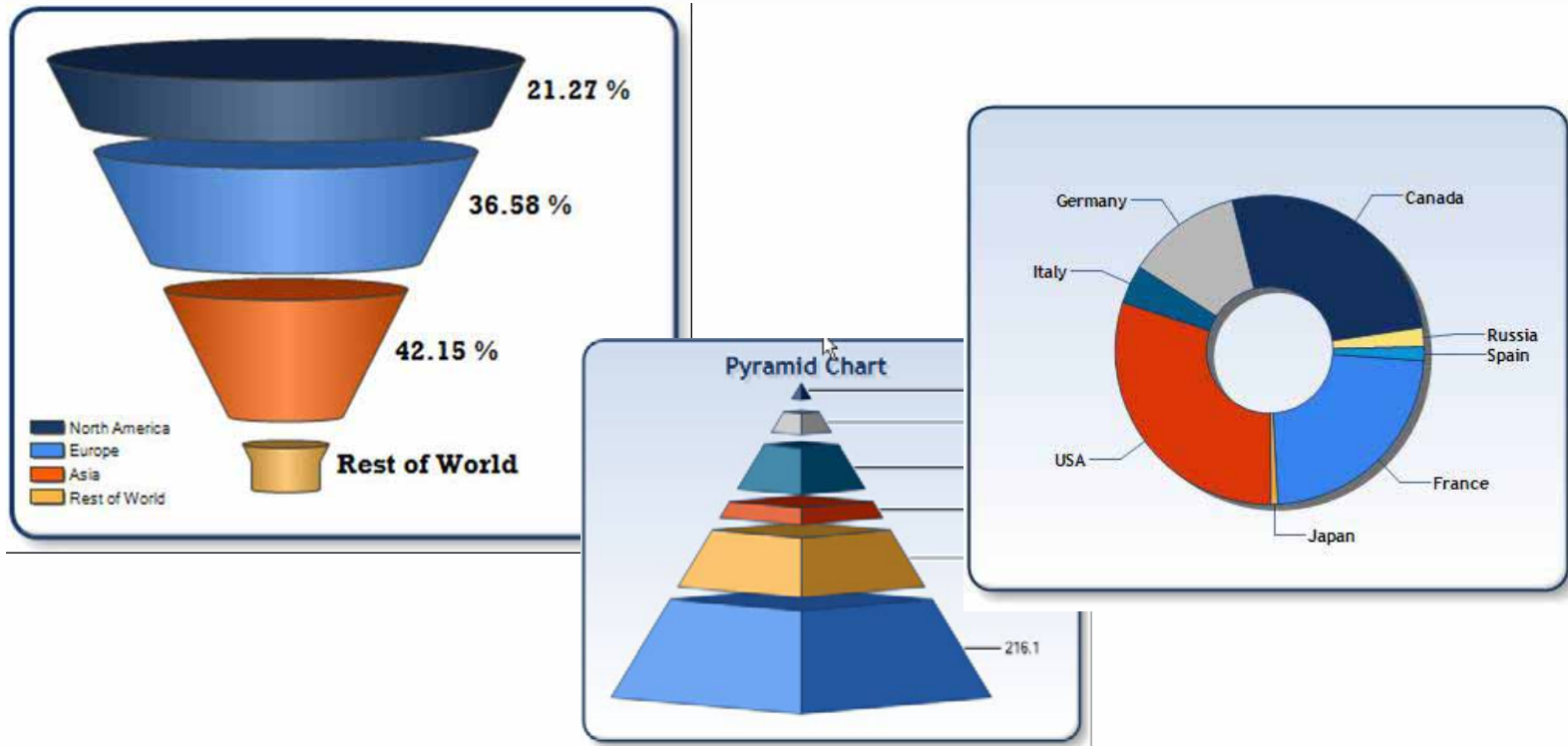
- In-line editing of reports for improved productivity

The screenshot shows a web application interface for managing incidents. At the top, there are tabs for 'Home', 'Report', 'Display', and 'Data'. Below the tabs is a toolbar with icons for 'New', 'Edit', 'Copy', 'Delete', 'Print', 'Forward', 'Assign', 'Propose', and 'Fill Inbox'. To the right of the toolbar are buttons for 'Inline', 'Bucketize', 'Save', and 'Auto-Save', along with a search icon and a refresh icon. Below the toolbar is a table of incident records. The table has columns for 'Subject', 'Status', 'Full Name', 'Queue', 'Date Last Updated', 'Reference #', and 'Action'. The 'Status' column for the 13th row is highlighted, and a dropdown menu is open, showing options: 'Solved', 'Unresolved', 'Updated', and 'Waiting'. The 'Unresolved' option is currently selected.

Subject	Status	Full Name	Queue	Date Last Updated	Reference #	Action
1 TEST □ and □...	Unresolved		Tier II	03/13/2007 01:54 PM	070313-000000	Edit
2 Can't dial out! When I try to make a cal	Solved	John Jergenson	Tier II	07/17/2006 04:35 PM	060717-000001	Edit
3 Can I check my minutes from my phon	Solved	Faith Carson	Tier II	07/17/2006 04:41 PM	060717-000000	Edit
4 test2...	Unresolved		Tier II	07/06/2006 04:42 PM	060706-000002	Edit
5 test1...	Unresolved		Tier II	07/06/2006 04:40 PM	060706-000001	Edit
6 What's my account balance?...	Solved	Edward Lang	Tier II	07/06/2006 12:22 PM	060706-000000	Edit
7 Do you support e-billing? I'm constantl	Solved	John Jergenson		07/03/2006 02:53 PM	060703-000000	Edit
8 Address Change	Solved	Faith Carson		07/05/2006 04:17 PM	060628-000020	Edit
9 Directory assistance	Solved	John Jergenson		07/05/2006 04:17 PM	060628-000019	Edit
10 Address Change	Solved	Brenden Foster		07/05/2006 04:09 PM	060628-000018	Edit
11 Invalid Number	Solved	Faith Carson		07/05/2006 04:09 PM	060628-000017	Edit
12 Address	Solved	Brenden Foster		07/05/2006 04:09 PM	060628-000016	Edit
13 Address Change	Solved	Faith Carson		07/05/2006 04:09 PM	060628-000015	Edit
14 Phone replacements	Solved	John Jergenson	Tier II	07/05/2006 04:19 PM	060628-000014	Edit
15 Disconnected	Unresolved	Faith Carson		07/05/2006 04:09 PM	060628-000013	Edit
16 Reception problems	Updated	Faith Carson	Tier II	07/05/2006 04:19 PM	060628-000012	Edit

Analytics Usability Enhancements

- **Additional chart types**
 - Funnel, pyramid, donut chart types now available



Analytics Usability Enhancements

- **In-line gauges for progress indication**
 - Circular, progress bar, linear gauges with more granularity



Analytics Usability Enhancements

- **Additional best practice administration reports**
 - All scheduled reports
 - Reports currently/currently not being utilized (in date range)
 - Staff management
 - Account permission access – permission access rights available to each account
 - Permission setting access – accounts/profiles that have access to a particular permission setting e.g. edit incident
 - Account workspace access – which workspaces are being accessed by a specified account
 - Workspace access – which accounts/profiles have access to a specified workspaces
 - Disabled accounts
 - Logged-in users
 - Custom fields – list of custom fields configured on the site
 - Standard responses – list of all standard responses

Platform and Remote Deployment Support

- **On-premise platforms in addition to our SaaS offering**
 - Linux glibc 2.4 / mySql 5.0 / Apache 2.0 (SSL)
 - Linux glibc 2.4 / Oracle 10g / Apache 2.0 (SSL)
 - Win2K3 SP2 / SQL Svr 2005 SP1 / IIS 6.0
 - Win2K3 SP2 / Oracle 10g / IIS 6.0
- **Microsoft Vista OS Desktop Support**
- **New MSI installer delivers a single package of all required RightNow installation files**
 - Useful for remote or highly secure installations (via network, CD)

Additional Languages

12 additional languages will be added in the Nov. '07 release for a total of 33 supported languages and dialects.

1. Russian
2. Hungarian
3. Lithuanian
4. Estonian
5. Latvian
6. Greek
7. Romanian
8. Bulgarian
9. Ukrainian
10. Slovakian
11. Croatian
12. Serbian



Can't Get Enough?

Visit the Community Lounge from 4:30 – 6:15pm on Wednesday, August 29 for an informal discussion & Q&A with RightNow PMs, including David Hayden, Product Strategy Manager & myself.



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Thank You!