



REACHING NEW HEIGHTS IN CUSTOMER EXPERIENCE



## Upgrading RightNow

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## What Will I Get Out Of This?

- Pre-Upgrade Planning & Preparation
- Differences between Hosted and Non-Hosted Upgrades
- Review of the Upgrade Process
- Post-Upgrade Success Factors
- What to Plan for in 8.0

## Pre-Upgrade Planning & Preparation

- Training
- Tune-Up
- Correct Configuration
- Appropriate Communication
- SmartConversion Document Review
- Product Function Review/Implementation
- Integration/Customization Updates

## Hosted vs. Installed Upgrades

- Hosted upgrades greatly eased by RightNow's Hosting Management System (HMS)
- Non-hosted upgrades require more preparation, effort and equipment
- Packages to assist non-hosted customers with upgrades are available through Professional Services

## Hosted Upgrades

- Test sites created by HMS
- Messaging indicates customized files that need to be redone
- System configuration changes are carried forward—settings contained in the database (rules, response templates, etc.) are not

## Non-hosted Upgrades

- Requires test hardware that is an exact duplicate of the production environment
- Need to manually copy data from production systems to create test site
- Professional Services has packages for remote and on-site upgrade assistance

## RightNow Smart Conversion Class

- Types of classes
  - Regional Training Workshops
  - Custom Onsite Training
  - Onsite User Training
  - Distance Based Training
  - Partner Certification
  - Online Learning Center
- Benefits
  - Hands-On with interactive Q&A
  - Live Product Scenarios
  - Taught by RightNow experts
  - Applied business processes
  - Peer to Peer learning of Best Practices
  - How your 7.5 site works in version 8

## RightNow “Tune-up”

- Review of your RightNow production environment to maximize your investment and your customers’ experience
- Value of this service
  - Cost savings through phone call and email reduction
  - Increased self-service rates
  - Quicker response time to customer inquiries
  - Higher customer satisfaction
  - Spam compliance review
  - Email response optimization
  - Enhanced email / web form appearance
  - Increase return on marketing campaigns
  - Improved click through results
  - Streamlined processes to support sales team
  - Higher end-user adoption/satisfaction
  - Better understanding of data/report availability

## Appropriate Communication

- Set internal and external expectations
- Communicate via:
  - Newsletters
  - Email
  - On-hold message
- Customized splash page during upgrade

## Smart Conversion Document

- Your “map” to the process
- Read it all, but...  
...each site is unique, focus on relevant areas
- Major changes to many areas:
  - Support Console
  - Views
  - Rules
  - Knowledge base
  - Analytics

## Product Function Review / Implementation

- Review config settings, views, rules, reports, etc. for correct conversion
- Implement/document changes to utilize new features and functions
- Redo customizations and integrations
- Test configuration and integration

## Upgrade Management System (UMS)

- System created to facilitate upgrade testing
- Ability to create Mandatory and Non-Mandatory Tasks
- Ability to assign tasks to local staff members
- No Cutover if Mandatory Tasks are not completed

# UMS DEMO

## Integration/Customization Updates

- Ensure all Customizations and Integrations are understood and documented (UMS)
- May have been done by your organization, RightNow or a combination of the two
- For hosted customers, HMS messaging will indicate what has been customized

## Customizations & Integrations (2)

- All customized PHP files should be reviewed and redone—not just replaced with the old version
- Ensure adequate time is allowed for recoding and testing. Additional schedule time may be required if work has been done by Pro Services
- Review support packages, upgrade if necessary

## Upgrade Scheduling Process

- HMS DEMO

## Post-upgrade Success Factors

- Review conversion of views, rules custom reports, etc.
- Re-implement changes as required
- Test all functionality
- Migrate custom fields if required
- Utilize support resources

## RightNow 8™ Upgrade Best Practices

- ATTEND SMART CONVERSION CLASS
- Get to 7.5.2 or later
- Focus on Workspace Configuration, Navigation Sets and Reports
  - Understand the functionality of the workspaces to be migrated folder
  - Review the settings in the workspaces and how they affect your site
- Train your users on the new workspaces based on your configuration
- Understand the tutorials
- Test the agent client install on a number of machines. Get all agents to login to the test site if possible

## RightNow 8 Reasons to upgrade

- **Single Application Console**
  - One integrated application console provides consistent navigation paradigm for better managing activities across all applications
- **RightNow OnDemand Desktop**
  - Uses a next-generation thin-client to deliver superior application usability, manageability and productivity on the desktop
- **Microsoft Outlook Integration**
  - Microsoft Outlook integrated within the RightNow OnDemand Desktop for improved agent productivity
- **Workspace Designer**
  - Provides easily configurable desktop workspace that can be tailored to user function, skill or business need
- **Enhanced Incident Management and Answer Management**
  - Improves usability and agent productivity

## RightNow 8 Benefits Summary

- **Enhanced Analytics**
  - Empower front-line business users to easily create, customize, and leverage highly personalized, in-context intelligence to drive business decisions
- **RightNow Feedback**
  - Capture, automatically route and act on the pulse of the customer for continual customer experience improvement
- **Enhanced RightNow Live chat**
  - Drive self-service adoption by building consumer confidence with a superior online experience guided by knowledgeable agents
- **Enhanced Integration - RightNow Connect**
  - Provides robust access to RightNow suite functionality using standards-based Service Oriented Architecture (SOA) integration platform
- **RightNow Genesys CTI Connector**
  - Facilitates interoperability between the RightNow Service agent desktop and the Genesys Customer Interaction Management Suite

## RightNow 8 Customer Quotes

"With each new release we're amazed at the evolutionary process of the solution and RightNow 8 simply blew us away."

- *Kyle Snay, Online Knowledge & Learning Administrator,  
Minnesota State Colleges and Universities*

"We love RightNow 8!". "RightNow 8 is already making huge efficiency gains". "The workspace editor is awesome!"

- *John Weber, President, Software Toolbox*

"Users love it! We are finding it is easy to use, easy to train and users are adapting quickly." "Making changes is so easy now that we don't have to go through IT and the reporting functionality is unbelievable."

- *Assistant Vice President, 'Anonymous' Bank*

"The views in reporting are much more robust. It is much more user friendly. The UI has been the best! We like how it's intuitive and looks like outlook. We had a great roll out and the functionality has been great."

- *Kim Huffman, WageWorks*

"RightNow 8 has been a huge timesaver and made us more efficient and productive. The interface looks and acts more like Outlook. RightNow 8 moves faster and is easier to use, navigate and teach yourself. The processes are also more integrated making it easier to create campaigns and mailings on the marketing side".

- *Michelle Butler, Creative Artist*

## We Can Help

- RightNow 8 Upgrade Packages (Remote or Onsite)
- Deliverables:
  - Pre-upgrade assessment
  - HMS process and checklist review
  - Project Charter and plan
  - New version consulting
  - Complete site specific testing
  - Custom cutover plan
  - Cutover consulting
  - Post-upgrade assessment

## Customer Feedback

"...found it easy to navigate, clearly set out and haven't had any trouble with it at all. The layout is well ordered and the functionality has improved"

"During the training that I conducted internally, most users commented that the new interface is much easier to use, and they recognize that it greatly resembles Great Plains, which we use for order processing and accounting. Most users have been able to use the new version without difficulty."

"My first impression of RightNow 8 have been excellent. We converted a month and a half ago and have been very pleased with the performance (it is exponentially faster) and with the new screen layouts."

"Overall this has been a very smooth major upgrade and I would encourage others to welcome the new technology and enhanced speed and performance."

## Thank You -- Questions

- RESOURCES

- RightNow Support Central <http://rightnow.custhelp.com>
- RightNow SmartConversion
- Training classes and Online workshops <http://www.rightnow.com>