



REACHING NEW HEIGHTS IN CUSTOMER EXPERIENCE

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RightNow Salesnet Customer Community Update Q3 2007

Presented by:
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Agenda

- Review the 3 phased approach to RightNow Salesnet
- Overview of RightNow Salesnet to RightNow 8.x Migration
- Data Migration – What IS and IS NOT migrated
- New Capabilities Available ONLY in RightNow CRM
- Migration Choices
- Migration Status
- The Migration & Afterwards
- Questions??



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RightNow Salesnet Phased Approach

Salesnet Phased Approach

The Salesnet application is still available and each customer will decide when to upgrade to a new version of the sales application.

- **Phase 1 – COMPLETED – End of Summer 2006**

- Integration between RightNow Salesnet and RightNow Service
- Allows service incidents to be viewable in RightNow Salesnet and Deals to be viewable in RightNow Service

- **Phase 2 – COMPLETED - Summer 2007**

- A migration path to easily upgrade customers from RightNow Salesnet to RightNow CRM 8.x

- **Phase 3 – Throughout 2008***

- Best Features of RightNow Salesnet functionality will be available in RightNow CRM application

Common questions and answers

Q: Do Salesnet customers have to migrate? Is there a date they must migrate by?

A: The Salesnet customer will decide if/when to migrate.

Q: Is Salesnet going away?

A: There is not a plan at this time to discontinue the RightNow Salesnet application.

Q: Are there any enhancements planned for Salesnet?

A: Only bug fixes and Vista support are planned at this time. We will concentrate on adding the best features of Salesnet PLUS additional requested features into RightNow CRM.

Q: What are the best features of Salesnet?

A: A few of the identified features include:

- Workflow Driven UI
- Field types
- Security
- Data Management (Data Import & Merge/Purge)

Q: How much is it going to cost me to migrate to RightNow CRM?

A: We have a comprehensive package which includes licensing, the migration and services that your account manager will be able to communicate it to you.



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Overview

RightNow Salesnet to RightNow 8.x
Migration

Overview

- Salesnet-to-RightNow Migration allows customers to migrate from the Salesnet platform to a NEW RightNow 8.x site.
- Data from Salesnet will be migrated in an automated fashion.
- Some data will be transformed during the migration.
- Not all data will be migrated.
- Customers must make some “migration choices” prior to the migration date, which will help drive the actual migration.
- Additional configuration of RightNow application will be required after data is migrated.
- A "test" migration and validation can be performed before making the final switch.
- The migration does not affect the customer's Salesnet data.
- Goal is for the customer to discontinue use of Salesnet application and begin use of RightNow application.



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Data Migration – What IS and IS NOT Migrated

What IS Migrated to RightNow

| Salesnet | RightNow |
|---|---|
| Custom Fields | Custom Fields* |
| Company Position Chart | Staff Acct Folders, Account Hierarchy |
| Users | Staff Accounts |
| Privilege Profiles | Account Profiles* |
| Sales Processes & Lead Stage Sets -Process Steps -Step Auto-Tasks | Sales Strategies -Stages -Stage Tasks |
| Account Records | Organization Records |
| Contact Records | Contact Records |
| Deal Records - Completed Deal Step History | Opportunity Records - Opportunity Notes* |
| Lead Records (Optional) | Org/Cont/Oppty Records* |
| Task Records | Task Instance Records |
| Appointment Records | Task Instance Records |
| Multi-Note Records | Note Records |
| Attached Documents | File Attachments |

* Affected by migration choices

What IS NOT Migrated to RightNow

Salesnet elements which will not be migrated:

- Lead Queues
- Campaigns
- Subtotal Report Definitions
- Subtotal Report Snapshots
- Dashboard Definitions (Charts and Lists)
- Dashboard Chart Snapshots
- Record Relationships (Acct-Acct, Cont-Cont, Deal-Deal)
- All Screen Layouts
- All Listing Layouts
- User Teams
- Custom fields of type "Integration Link"
- Recurring Appointment Records
- Private Task and Appointment Records
- Document Library Files
- Record & Field-Level Access Grants
- Integrations using Salesnet's XML Web Services

Capabilities not in RightNow CRM... YET!!

- Process builder / Result-driven layouts
- Additional field types- RightNow CRM does not support multi-select picklists, calculated fields, loose picklists and currency custom fields...
- Record-level/field-level data access – Data is secure by a profile/role model in RightNow CRM.
- Data Import – Only has built-in contact import tool. Professional Services or use of RN Connect is needed for account (organizations) and deal (opportunities) imports.
- Lead queues/ separate “lead” object – Leads are deals (opportunities) in an early stage in RightNow CRM, not a separate data object.



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New Capabilities Available ONLY in
RightNow CRM

RightNow CRM is packed with
capabilities not available in RightNow
Salesnet...

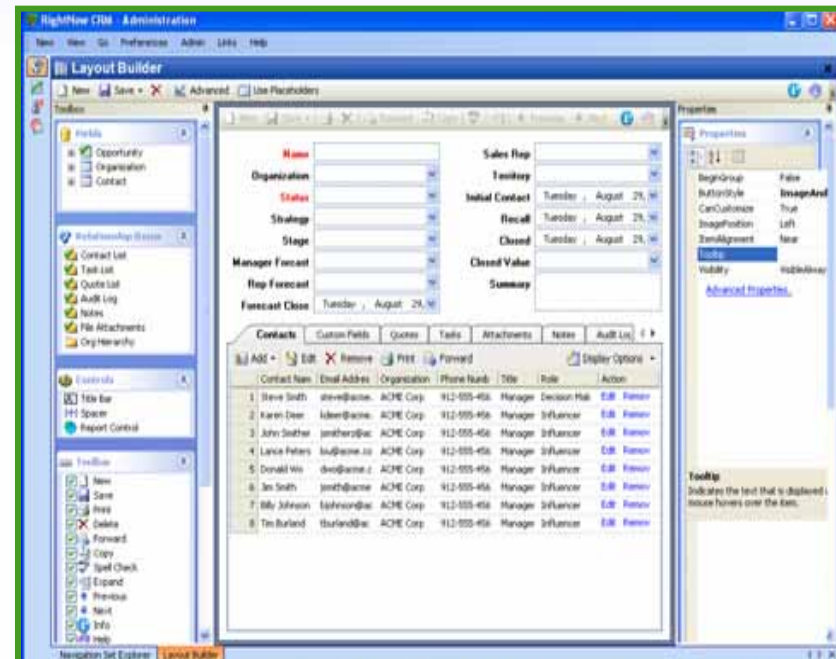
New Capabilities ONLY in RightNow CRM

The following capabilities are currently available in RightNow CRM that are not available in RightNow Salesnet:

- Intuitive user interface
- More powerful analytics and dashboards
- Integrated CRM with additional modules that compliment Sales:
 - Service- Incident Management
 - Web Self-Service/Knowledgebase
 - Marketing
 - Feedback/Surveys
- Support for 21 languages
- Alerts via Rules or Scheduled Reports
- Audit logs
- Quotes/quota management
- Plus more....

Intuitive User Interface

- **Easy to use**
 - Maximize user adoption with role-based profiles (Sales, Service, Marketing, Executive, Manager, Rep)
 - UI modeled after Microsoft Outlook for familiar look-and-feel
- **Drive productivity with in-context analytics**
 - Critical knowledge integrated into screens and processes
- **Tailor to specific needs with drag-and-drop screen layout customization**
 - Fields
 - Tabs
 - Integrations
 - Toolbars
 - Analytics
 - Tasks



RightNow Analytics

- Inline and contextual
- Report design center
 - Drag-and-drop report creation
 - Real-time preview
 - Colors and logos
- Customizable dashboards, reports, and homepages
- Powerful charts
- Editable filters
- Run-time rollups
- Scheduled reports
- Historical trending

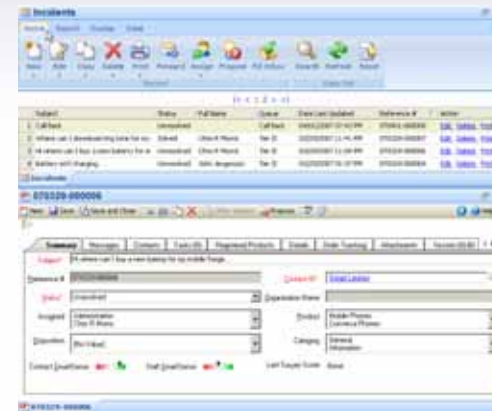


Additional Modules Complement Sales

Web Self-Service



Customer Service



Marketing



Feedback/Surveys

The screenshot shows a Global Solutions feedback/survey form. The header includes the GS logo and navigation links. The form starts with a welcome message: 'Welcome! Please take the time to answer a few quick questions about your experience with Global Solutions Support.' It then asks 'How would you rate our service?' with a scale from 5 (Outstanding) to 1 (Poor). Below this, it asks 'What factors led you to your rating of our service?' with checkboxes for Speed of Service, Responsiveness of Representative, Availability of Information, Satisfaction with Resolution, and Other. The form concludes with a text box for additional feedback and a 'Submit' button.

Complete Language Support in Every Release

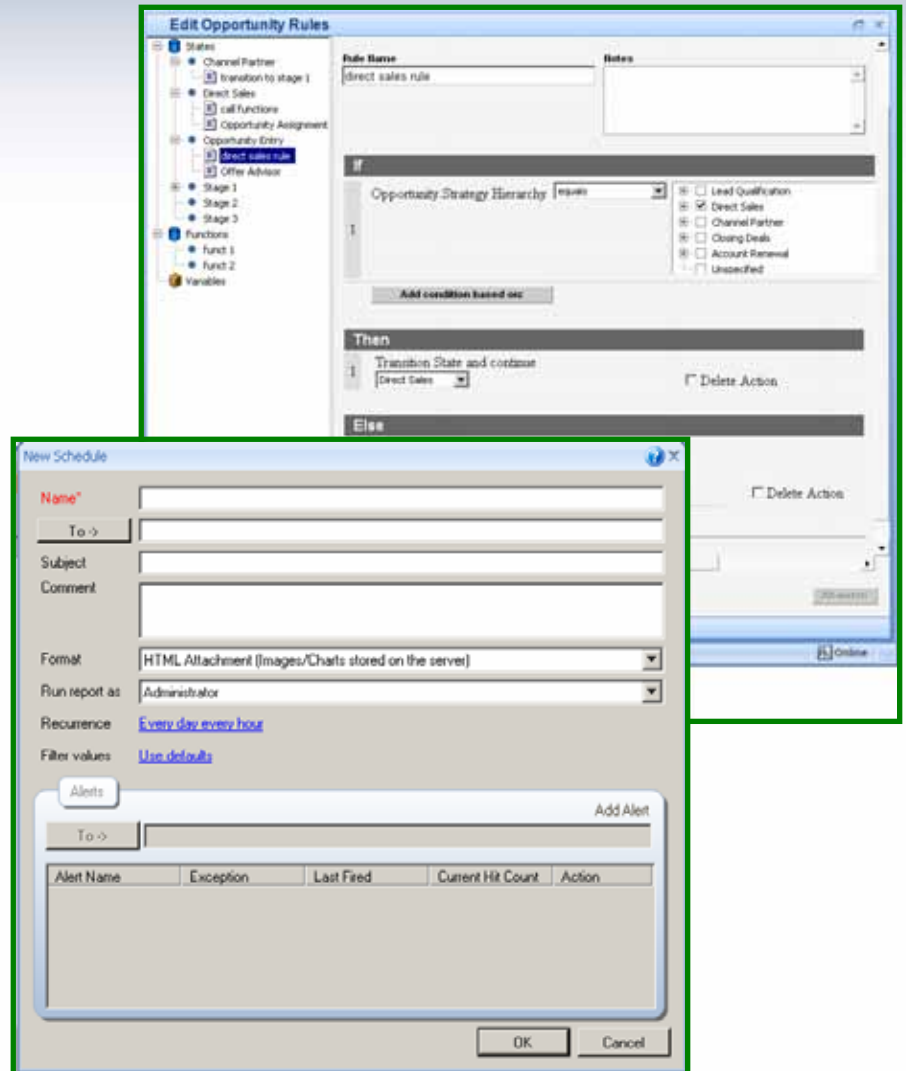
Wide breadth of language support with **21 native languages and dialects** supported

1. English -- North American
2. English – European
3. English – Australian
4. French – European
5. French -- Canadian
6. German
7. Dutch
8. Spanish
9. Brazilian Portuguese
10. Finnish
11. Italian
12. Swedish
13. Norwegian
14. Danish
15. Czech
16. Polish
17. Japanese
18. Simplified Chinese -- Mainland China
19. Traditional Chinese -- Hong Kong (Cantonese)
20. Traditional Chinese -- Taiwan (Mandarin)
21. Korean



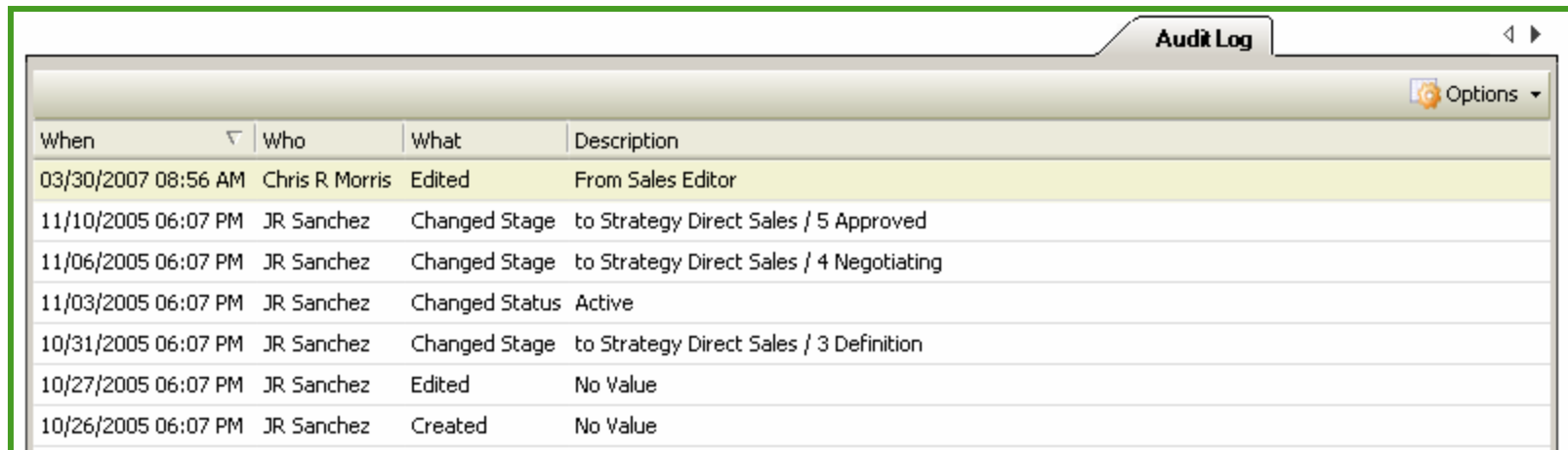
Alerts via Rules or Scheduled Reports

- If-Then-Else rules enable the ability to escalate and send alerts.
 - Email Opportunity Information
 - Send Escalation Notification
 - Send Marketing Email
 - Send Transactional Survey
- Scheduled reports/dashboards
 - Choose to, subject, comment, recurrence and even filters for the emailed report.
 - Use of data exception allows a report to be emailed when certain criteria is met.



Audit Logs

- Tracking of who edits, when and what action took place.
- Audit Logs are available on:
 - Contacts
 - Organizations (Accounts)
 - Opportunities (Deals)
 - Tasks



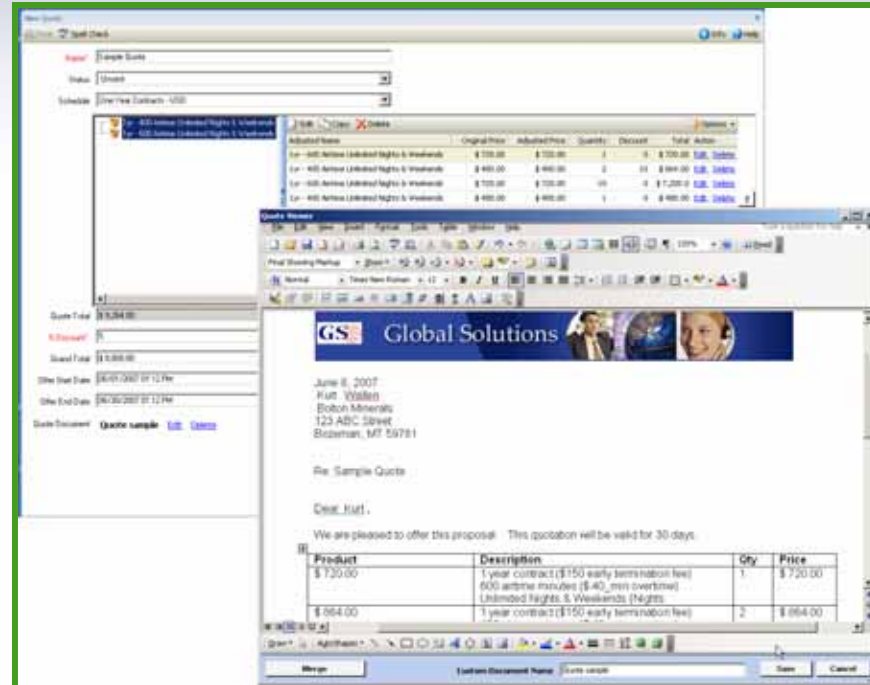
The screenshot shows a window titled "Audit Log" with a table of system changes. The table has four columns: "When", "Who", "What", and "Description". The data is as follows:

| When | Who | What | Description |
|---------------------|----------------|----------------|--|
| 03/30/2007 08:56 AM | Chris R Morris | Edited | From Sales Editor |
| 11/10/2005 06:07 PM | JR Sanchez | Changed Stage | to Strategy Direct Sales / 5 Approved |
| 11/06/2005 06:07 PM | JR Sanchez | Changed Stage | to Strategy Direct Sales / 4 Negotiating |
| 11/03/2005 06:07 PM | JR Sanchez | Changed Status | Active |
| 10/31/2005 06:07 PM | JR Sanchez | Changed Stage | to Strategy Direct Sales / 3 Definition |
| 10/27/2005 06:07 PM | JR Sanchez | Edited | No Value |
| 10/26/2005 06:07 PM | JR Sanchez | Created | No Value |

Quotes and Quota Management

Contract, Quote, and Proposal Generation

- Create accurate, customer-ready contracts, quotes and proposals
- Pricing templates save valuable time
- Send as PDF



Sales Periods - Edit

• Name: Q3 2005
Type: Quarterly
Start Date: 7/ 1/ 2005
End Date: 9/ 30/ 2005
Goal Revenue: \$ 0.00
Headcount:
Closed Opportunities Goal:
Notes:
Quotas:

| Account | Amount |
|----------------|---------------|
| Abby Parker | \$ 250,000.00 |
| Administrator | \$ 0.00 |
| Andrew Larson | \$ 150,000.00 |
| Brent Dirkwood | \$ 215,000.00 |
| Carrie Turner | \$ 0.00 |
| Chris R Morris | \$ 0.00 |

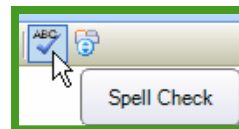
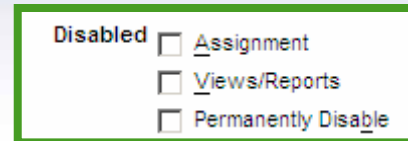
Save Cancel

Set Quotas by Sales Periods

- Flexible quota goal setting
- Track quota status

Additional Features:

- Permanently disabling Staff Accounts (users do not need to be deleted to not count towards licenses)
- Spell check (administrator sets on workspace which fields are spell checked)
- Bulk editing of records (no wizard needed to mass-change a group of records - change only field values available on the Multi-Edit workspace defined by the administrator)



| | | | | | | | | | |
|-------------------|-----------------|-------------------|-----------------|-----------|---|----------------|-----------|-----|------|
| First Reunion Ban | Brent Dirkswood | First Reunion ren | Tom Harrison | \$ 67,200 | 5 | Approved | 03/30/200 | Yes | Edit |
| Goldstein Loans | Chris R. Morris | Great Goldstein O | Aaron Goldstein | \$ 260,90 | 5 | Approved | 03/30/200 | Yes | Edit |
| Green Beacon Ba | Brent Dirkswood | Large renewal op | Nicky Tomaly | \$ 450,00 | | Interested? | 03/29/200 | No | Edit |
| GreenCare Yards | Andrew Larson | Cell phone renew | Avry Jong | \$ 31,000 | 3 | Pipeline (20%) | 03/30/200 | Yes | Edit |
| Indigenous | Brent Dirkswood | Sales opp for con | Jerry Conlon | \$ 99,000 | 5 | Approved | 03/30/200 | Yes | Edit |
| Indigenous, Inc. | JR Sanchez | Equipment Updat | Mathew Johnson | \$ 0.0 | | | 03/30/200 | Yes | Edit |
| Indigenous, Inc. | JR Sanchez | USB Cables | Sean Emerson | \$ 100,0 | | | | | |
| Indigenous, Inc. | JR Sanchez | End User Marketi | Kari Brooke | \$ 23,00 | | | | | |
| Jupiter Networks | JR Sanchez | Switching from Q | Sally Soccermom | \$ 92,00 | | | | | |
| Jupiter Networks | Brent Dirkswood | Primary opportuni | Sally Soccermom | \$ 154,0 | | | | | |
| Kennerwick Optic | JR Sanchez | Lost opportunity | Anika Stones | \$ 69,00 | | | | | |

Context menu options: New, Edit, Copy, Delete, Print, Forward, Opportunity, Contact, Organization, Edit.



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Migration Choices

Pre-Migration Preparation

Migration Choices

- Built-In Fields to Custom Field Migration
 - Certain Salesnet built-in fields do not have an equivalent built-in field in RightNow. Customers can choose which fields to migrate into custom fields or not migrate at all.
- Custom Field Migration
 - There are several differences between Salesnet custom fields and RightNow custom fields. Customers must decide how they want the migration to handle these differences.
- Users not part of a Privilege Profile
 - Users in Salesnet do not have to be assigned a profile, while RightNow requires each user (staff account) to be assigned a profile. This section allows customers to handle any unassigned users.
- Lead Record Migration
 - Customers must choose whether or not to migrate Lead records. If they want them migrated, several options must be chosen prior to migration.
- Country Field Mapping
 - Country information is stored as free-text in Salesnet but as strict Country Codes in RNT. Customers must map free-text entries to specific Country codes.
- Date Format in Notes
 - During migration, some notes, such as Deal Step notes will become part of text notes. Customers must choose the format they want dates to appear in these notes.

Migration Choices

- Built-In Fields to Custom Field Migration
 - Certain Salesnet built-in fields do not have an equivalent built-in field in RightNow. Customers can choose which fields to migrate into custom fields or not migrate at all.

? Setup : Salesnet Fields Migration

The BIF's listed below are not automatically migrated to RightNow.
Choose which of these BIF's whose data you want to be migrated to a new RightNow Custom Field.

Account Fields: **Save** [Account](#) | [Contact](#) | [Deal](#)

| Salesnet Account BIF | Migrate to RN | RightNow Organization CDF - Enter the Column Name in RN database* |
|--------------------------|-------------------------------------|---|
| My Phone [AcctPhone] | <input type="checkbox"/> | |
| Biffy Phone [AcctPhone2] | <input checked="" type="checkbox"/> | <input type="text" value="[acctphone2]"/> |
| Biz Fax [AcctFax] | <input checked="" type="checkbox"/> | <input type="text" value="acctfax"/> |
| [AcctURL] | <input checked="" type="checkbox"/> | <input type="text" value="[accturl]"/> |
| ... | | |

Migration Choices

- Custom Field Migration
 - There are several differences between Salesnet custom fields and RightNow custom fields. Customers must decide how they want the migration to handle these differences.

| Deal Fields: | | Account Contact Deal | | | |
|--|-------------------------------------|--|-----------------------------|--|---|
| | <input type="button" value="Save"/> | Migrate to RN | Column Name in RN database* | Choose which RN Data Type | How to handle Data of Many-Valued field |
| Contract Length (Months) (Integer, Key In, ONE) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | contract_length_months | | |
| Deal Duration (Integer, Calc, ONE) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | deal_duration | <input checked="" type="radio"/> Menu (max = 40) <input type="radio"/> Text Field (max = 255) | |
| Discounted Per Widget Price (Currency, Calc, ONE) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | discounted_per_widget_pr | <input checked="" type="radio"/> Menu (max = 40) <input type="radio"/> Text Field (max = 255) | |
| Fave Color (String, LoosePL, ONE) | <input type="checkbox"/> | <input type="checkbox"/> | | | |
| Forc Deal Value (Currency, Calc, ONE) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | forc_deal_value | <input type="radio"/> Menu (max = 40) <input checked="" type="radio"/> Text Field (max = 255) | |
| Forc DV Wave2 (Currency, Calc, ONE) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | forc_dv_wave2 | <input checked="" type="radio"/> Menu (max = 40) <input type="radio"/> Text Field (max = 255) | |
| Number of Widgets (Integer, Key In, ONE) | <input type="checkbox"/> | <input type="checkbox"/> | | | |
| Price Per Widget (Currency, Key In, ONE) | <input type="checkbox"/> | <input type="checkbox"/> | | | |
| Prospect Ranking (Integer, StrictPL, ONE) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | prospect_ranking | <input type="radio"/> Menu (max = 40) <input checked="" type="radio"/> Text Field (max = 255) | |
| Total Contract Price (Currency, Calc, ONE) | <input type="checkbox"/> | <input type="checkbox"/> | | | |
| Total Monthly Price (Currency, Calc, ONE) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | total_monthly_price | <input checked="" type="radio"/> Menu (max = 40) <input type="radio"/> Text Field (max = 255) | |
| Widget Discount (Decimal, Key In, ONE) | <input type="checkbox"/> | <input type="checkbox"/> | | | |

Migration Choices

- Users not part of a Privilege Profile
 - Users in Salesnet do not have to be assigned a profile, while RightNow requires each user (staff account) to be assigned a profile. This section allows customers to handle any unassigned users.

? Setup : Users Without Profiles

To help migrate any of your Users who don't belong to a Privilege Profile, fill in these 2 "Mini Privilege Profiles".

For all unaffiliated Company Admins **Save**

| | Salesnet Privilege Profile | RightNow Profile |
|-------------------------------------|------------------------------------|---|
| <input type="checkbox"/> | Process Builder Administrator | Common / Administrator / Business Process Settings |
| <input checked="" type="checkbox"/> | Accounts & Contacts Import | Common / Administration / Contact Upload |
| <input type="checkbox"/> | Cannot Delete Accounts & Contacts | Together these 2 determine... |
| <input checked="" type="checkbox"/> | Read-Only Accounts & Contacts | Organizations / Add Edit Delete Contacts / Add Edit Delete |
| <input type="checkbox"/> | Cannot Delete Deals | Together these 2 determine... |
| <input checked="" type="checkbox"/> | Read-Only Deals | Sales / Add Edit Delete |
| <input type="checkbox"/> | Cannot Delete Appointments & Tasks | Together these 2 determine... |
| <input checked="" type="checkbox"/> | Read-Only Appointments | Appointments & Tasks / Add Edit Delete |

Migration Choices

- Lead Record Migration
 - Customers must choose whether or not to migrate Lead records. If they want them migrated, several options must be chosen prior to migration.

Decide whether you want Lead records to be migrated. Save

Do NOT migrate Lead records
 DO migrate Lead records

Migrate all 'Working' Leads...
 to new RN Contacts and Organizations
 to new RN Contacts and Organizations and Opportunites (Status = 'Lead')

Migrate all 'Rejected' Leads...
 to new RN Contacts and Organizations
 to new RN Contacts and Organizations and Opportunites (Status = 'Rejected')

There are no Lead Queues in RightNow.
Choose a User to 'own' the records which will get created in RightNow from Salesnet Leads which are owned by a Queue.

Direct Sales Queue ▼

EMEA Lead Queue ▼

Inside Sales Queue ▼

Reseller Lead Queue ▼

Migration Choices

- Country Field Mapping
 - Country information is stored as free-text in Salesnet but as strict Country Codes in RNT. Customers must map free-text entries to specific Country codes.

- Select one or more "Unrecognized Country"
- Select one Target Country
- Click the [Map To] button - Repeat as desired

Unrecognized Countries:

| | |
|------------------|---------------------|
| (3) 555-8364 | AF - Afghanistan |
| (12) Brasil | AL - Albania |
| (1) Indya | DZ - Algeria |
| (3) Jakarta | AS - American Samoa |
| (2) Ierland | AD - Andorra |
| (1) Korea, south | AO - angola |
| (28) Korea | AI - Anguilla |

Map To

Your Current Mappings **Done**

| Country Description (click value to remove) | country Code |
|--|---------------------|
| CHN Chiina P.R.C P.R. China | CN - China |
| Scotland UK | GB - United Kingdom |
| US USA | US - United States |

Migration Choices

- Date Format in Notes
 - During migration, some notes, such as Deal Step notes will become part of text notes. Customers must choose the format they want dates to appear in these notes.

Setup : Date Format in Notes

As part of the Data Migration to RightNow, some dates will become part of text notes.
For example, each Deal Step in Salesnet will, in RightNow, become a Note attached to an Opportunity.

Example:

Completion Date: 07-23-2007

Completed By: Giuseppe Di Lampedusa

Choose which format to use when placing the date into the text string.

- MM-DD-YYYY
- DD-MM-YYYY
- YYYY-MM-DD

Save



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Migration Status

Migration Status

- **Red** – Customer has not completed all of the pre-migration work required to migrate their data.

? Setup : Right Now Site Migration Status



Your Migration Choices and overall Setup are not "complete and acceptable".
See Errors/Warnings below:

- These CDF's need Migration Choices to be made on **Migration Choices : CDF Migration (A/C/D)**
Account CDF's:
 - **My Really New Field**
 - **Cool Date Field**Deal CDF's:
 - **Wicked Date**
- You need to make Migration Choices on the **Migration Choices : Mini-Privil Profiles** page.
- You need to make Migration Choices on the **Migration Choices : Lead** page.
- You have too many levels in your CPC.
The number of Positions is not the problem.
However, in order to migrate to RN, you cannot have more than 12 levels deep in your CPC.
For help in fixing this problem, you may call Salesnet.
- (Warning Only)
You have not entered any Country Mappings.
While this is acceptable, it may indicate that you should do some work on the **Migration Choices : Country Field Mapping** page.

Ok

Migration Status

- **Yellow** – Customer has completed all of the pre-migration work required to migrate their data but additional choices may result in a cleaner migration.

Setup : Right Now Site Migration Status



Your Migration Choices and overall Setup may not be "complete and acceptable".
See Warnings below:

- You have not entered any Country Mappings.
While this is acceptable, it may indicate that you should do some work on the **Migration Choices : Country Field Mapping** page.

Ok

Migration Status

- **Green** – Customer has completed all of the pre-migration work required to migrate their data as cleanly as possible.

Setup : Right Now Site Migration Status



Your Migration Choices and overall Setup are "complete and acceptable".

Ok



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The Migration & Afterwards

Migration

- Once all migration choices have been made, the Salesnet-to-RightNow Data Migration will be scheduled for a customer.
- Migrations will be scheduled to take place at off peak times (Friday, Saturday, Sunday)
- Data will be migrated from Salesnet and into a RightNow database and file system.
- The data files are transferred securely between the Salesnet hosting center to the RightNow hosting center.
- The RightNow HMS team will deploy a new instance of RightNow for the customer using the migrated data.
- The customer will be notified that the RightNow instance has been created and will be provided log in information to examine the migration.
- The migrated customer will work with RNT Professional Services to configure the new RightNow Sales module prior to going live with employees.

After the Migration

Important reminders to the customer, after the data-migration:

- Verify your staff accounts manager hierarchy
- Verify your countries and states/provinces
- Edit your Currencies (symbol, decimal-char, grouping-char)
- Enter your Exchange Rates (if more than one currency)
- Review the task interval for each task within each stage of each strategy
- Menu-items were truncated to 40 chars (may want to review BEFORE migrating)
- Names of your Organizations (Accounts) have been truncated from 100 to 80
- Names of your Tasks/Appts have been truncated from 60 to 40
- Dates and datetimes don't have a default value

Use the migration as a good chance to clean up the data BEFORE migrating over.



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Questions?