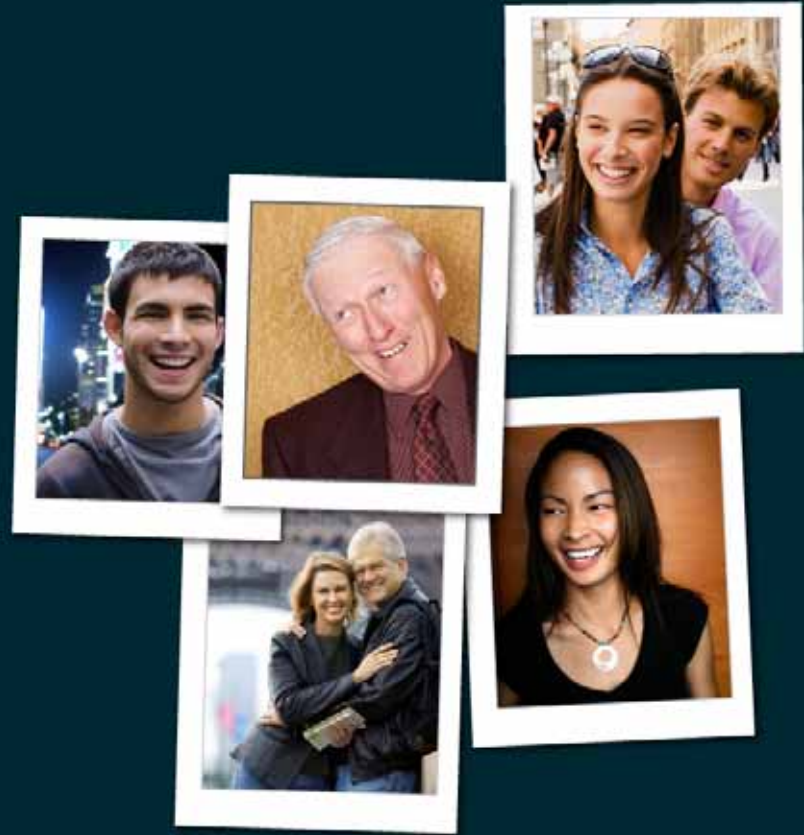


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ADVANCED CHAT

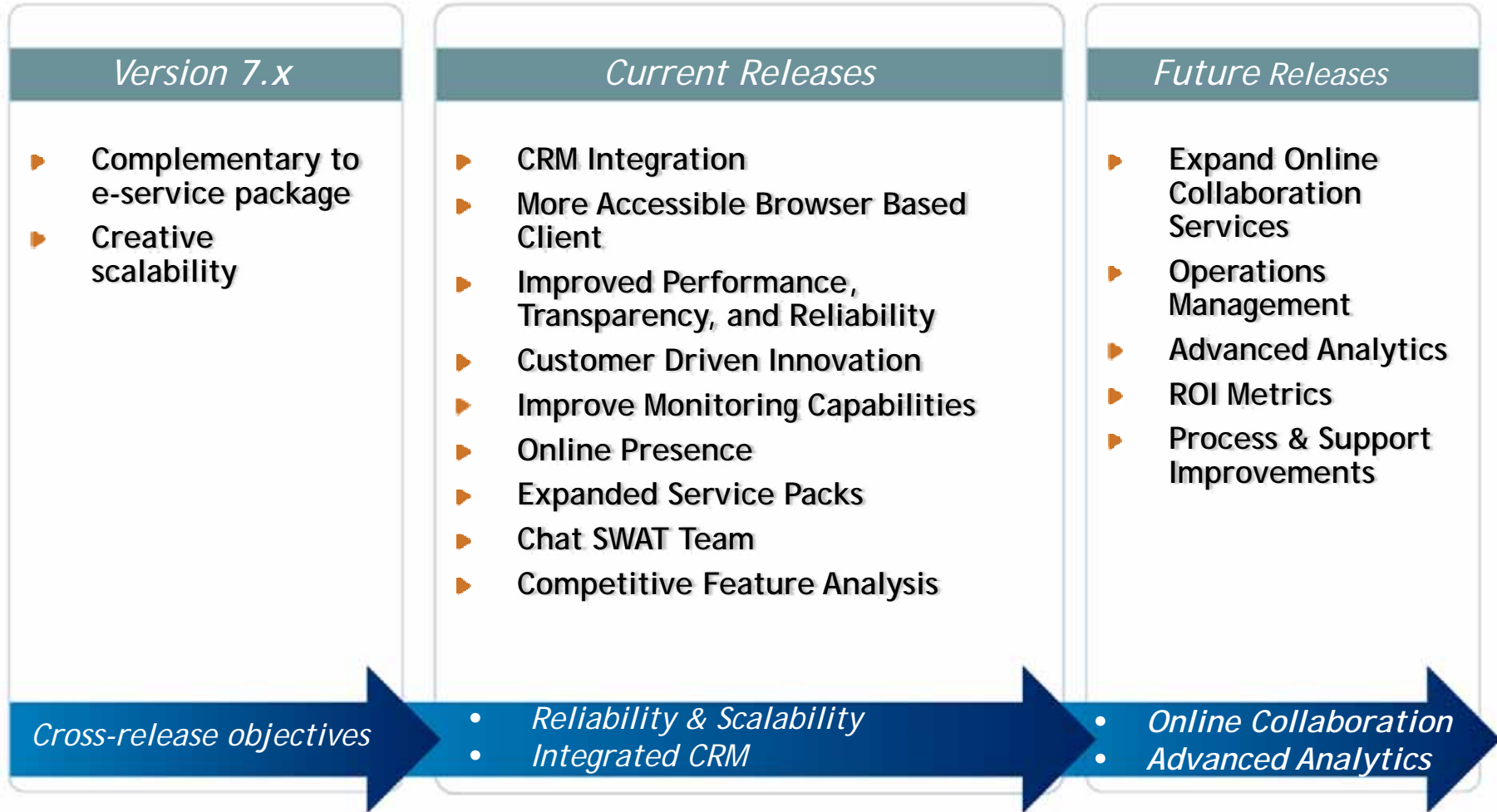
Mike Maringas

RIGHT
NOW.

- RightNow Chat Background
- Chat Customer Feedback Initiative
- How Does August'08 Provide Value?
- How to Plan for and Use Chat
 - Monitoring Chat Activity
- What's New August'08

RIGHTNOW CHAT - CUSTOMER-DRIVEN PRODUCT EVOLUTION

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TYPICAL CHAT CHALLENGES

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CUSTOMERS

Expect similar experiences across all channels

- Resolution / escalation process
- Knowledgebase tools
- Interaction history

MANAGEMENT

Strives to improve customer satisfaction and drive down costs

- Utilize built in trending analysis, productivity and service level reporting
- Accurate outsourcing financials
- No additional IT infrastructure

SUPERVISORS

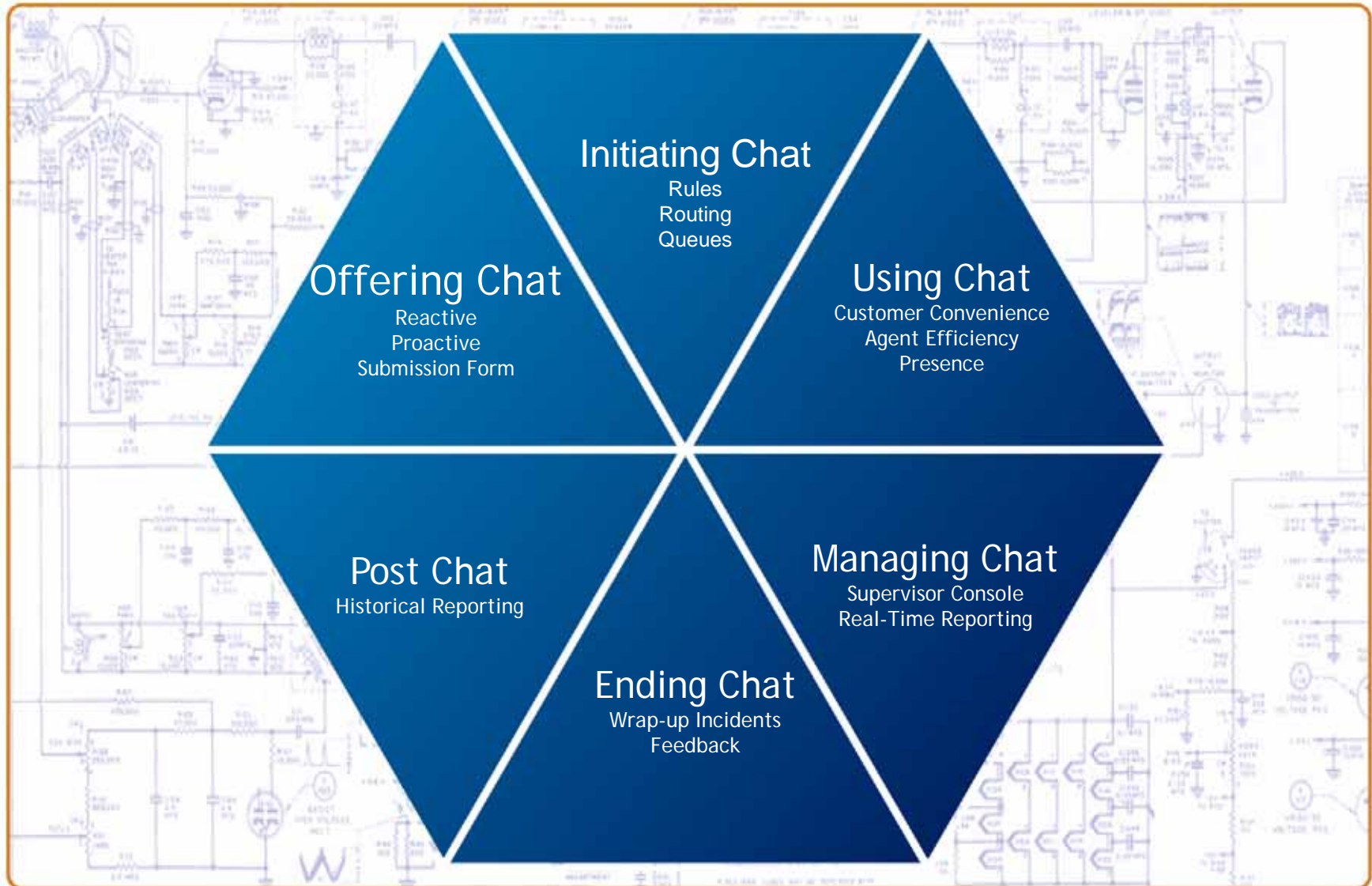
require tools and information to run efficient teams

- Increase customer satisfaction
- Monitoring of chat activity
- Making real-time adjustments

AGENTS

Squeeze all efficiencies out of an application

- Compose tools
- Right information at right time
- Appropriate indicators and alerts



Configure the application effectively for your organization processes, customers, and frontline employees ...

- Provide your customers assisted service option
 - Placement of chat option and design of request form is important
 - Offering Chat (proactive / reactive)
- Provide agents the information and access to the controls they need
 - Use workspaces for information display and to most effectively optimize their actions and behaviors

Connect customers waiting for agents ...

- Integrate self help knowledge base prior to the agent joining
- Let your customers know what to expect (queue wait time)
- Use canned or custom agent availability status
- Provide the Agent notification of assignment
- Routing chat
 - Queue distribution control - push, pull, round-robin, strict priority
 - Staff with specialized skills assigning agents to queues
 - Algorithms for which agent should get assigned chat

Working with chat ...

- Make the initial delivery and analysis of the chat seamless to the agent
- Provide chat response tools
- Setup the agent for the controls, actions, information and alerts they need to resolve or escalate the issue
- Utilize Presence management (typing indicator, connection quality) to keep track of the state of the session

Processes for receiving and recording transcript history and evaluating customer experience...

- Session Wrap-up
 - For tighter operator control use timed wrap-up modes
 - When wrap-up time is minimized use termination process
- Saving transcript
 - Utilize incident creation (automatic or manual mode) for a workflow resolution process
 - Transcript is also saved with chat record so incident is not required
- Customer Convenience Options for Saving Transcript
- Integrate RightNow Feedback with Chat

Use historical reporting to evaluate and adjust business processes ...

- Chat analytics for analyzing historical activity
- Handled and abandoned chats
- Historical records / transcripts

The screenshot displays a CRM interface with several analytics reports. The main report is titled 'Chat Supervisor Trending Report By Group'. It includes a table for 'Date Grouping' and a summary table for 'Group: Administration'. To the right, there is a 'Chat Supervisor His...' report with a table showing 'Completed' counts, percentages, 'Avg Wait Time', and 'Avg Duration'. Below these are 'Chat Summary' and 'All Chats' sections.

Date Grouping	Total Requests	Expired
30	0	0
31	0	0
Total/Weighted Average	17/	0/
Group: Administration		
01	1	0
02	0	0

Completed	%	Avg Wait Time	Avg Duration
65	100.00 %	0h 2m 15s	0h 13m 5s
17	100.00 %	0h 1m 5s	0h 9m 4s
1	100.00 %	0h 0m 7s	1h 35m 59s
83/		/0h 1m 59s	/0h 13m 24s

Interval	Total Requests	Request Average	Chat
01	3	3	
02	0	0	
03	0	0	
04	3	3	
05	0	0	
06	0	0	
07	3	3	

Chat ID	Agent Account	Date of First Agent Engagement	Full Name	Question
137	Chris R Morris	09/12/2008 04:47 PM	Ray r	No Value
136	Faith Carson	09/12/2008 01:09 PM	Ralph r	No Value
128	Faith Carson	09/12/2008 01:08 PM	r a	No Value
134	Chris R Morris	09/12/2008 12:56 PM	r a	No Value
133	Chris R Morris	09/12/2008 12:55 PM	Ralph r	No Value
132	Chris R Morris	09/12/2008 10:15 AM	r a	No Value
131	Chris R Morris	09/12/2008 09:57 AM	r a	No Value
130	Chris R Morris	09/12/2008 09:54 AM	Ralph r	No Value
54	Chris R Morris	09/12/2008 07:17 AM	Mike Maranga	No Value
53	Chris R Morris	09/11/2008 09:03 PM	Mike Maranga	No Value

Monitor chat activity to adjust resources for heavy session volumes ...

- Space Capacity
 - Monitor all agents currently logged in to chat
 - Monitor agents' current and available sessions
 - Monitor the number of active chats for individual agents
- Current Load on System
 - Monitor the number of waiting customers by queue
- Measure Chat Service Level

Tools for the Supervisor to QA their own agents ...

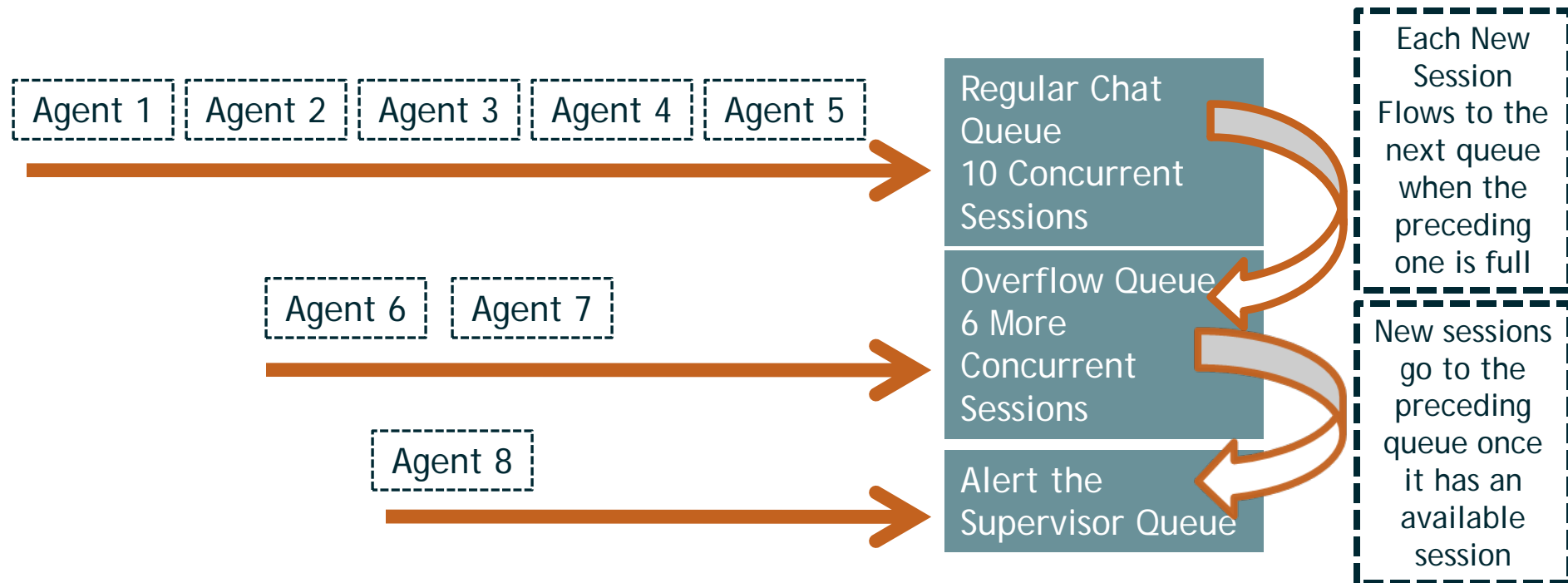
- Allows managers to monitor all active Live Chats on the system, in a department, or by agent—including the ability to view old chat sessions
- Managers can monitor Live Chats in real time—offering “co-chat” or coaching assistance when needed
- Supervisor ability to see which agents are active/available to manage staff effectively
- Agent Performance Metrics

Configure the display and refresh of operational reports ...

- Refresh Rate
 - Stats and other chat tables
- Refresh Containers
 - Manual / Auto refresh rates
 - Chat refresh control
- Report Placements
 - Utilizing Chat Workspaces
 - Communication Center Home
 - Dashboards
 - Report Explorer

MANAGING CHAT ACTIVITY

Best practice: utilize escalation rules to warn of potential SLA issues ...



- Chat Integration with Co-browse
 - Ability to share the consumer's desktop during a chat
- Proactive Chat
 - Simple rules for presenting a Chat invitation to a customer based on pre-defined conditions
- Chat Transcript
 - New web browser based transcript display
 - Provides basic text selection (copy/paste)
 - Customization is supported through CSS Styles, HTML Templates, and Images
- Return to Queue / Decline Chat
 - The agent can decline a chat and return it back to queue
 - The admin can configure accept or decline behavior when a notification expires
- Send Markup Language as Plain Text
 - Send message setting to be sent "rendered" or as plain text
 - Agent can send HTML/XML code snippet to the customer by marking it as plain text Send option is defaulted to HTML option

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Thank You!

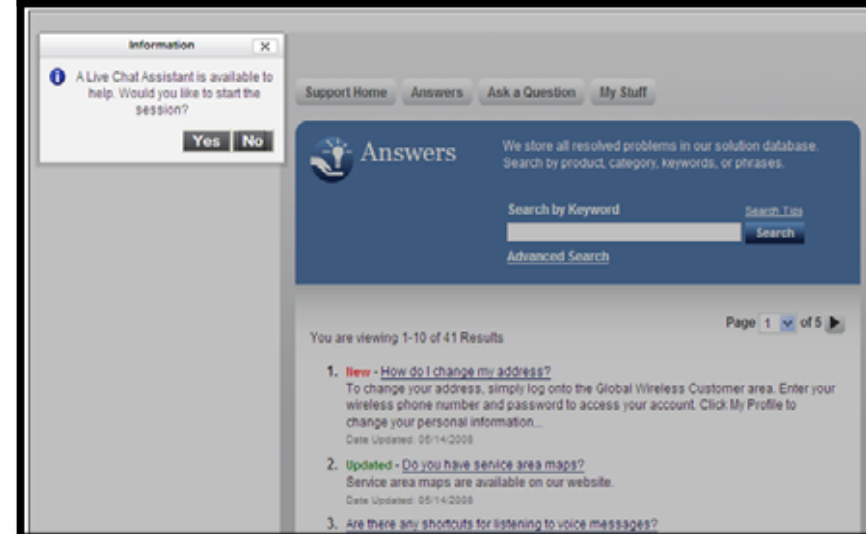
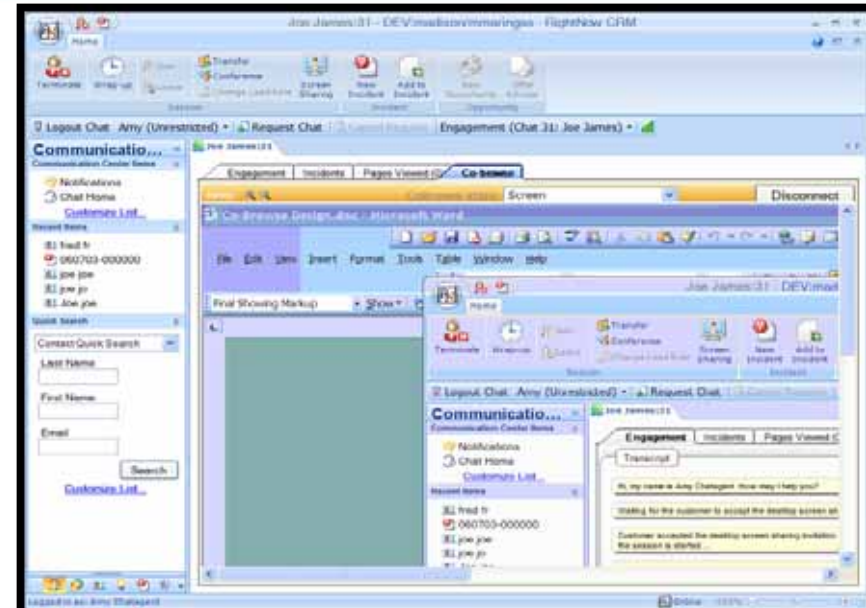
Mike Maringas
mmaringas@rightnow.com

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AUGUST '08 ENHANCEMENTS

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- Co-browse within Chat
 - Ability to share the consumer's desktop during a chat
 - No downloads
 - Works on all browsers (IE, Firefox, Safari)
 - Handles Web 2.0 technologies (i.e. Flash)
 - Agent single sign-on
 - Safe - permissions limit agent's control of the consumer's desktop
 - Secure - works with existing firewalls
- Proactive Chat
 - Simple rules for presenting a Chat invitation to a customer based on pre-defined conditions
 - Example: pop an invitation to chat after the user has performed two searches and sits idle for 60 seconds and the current expected wait to service a chat is less than 30 seconds



ENDING CHAT FEEDBACK INTEGRATION WITH CHAT

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Design surveys to solicit the most useful feedback ...

- Transactional (e-mail) associated to chat event
- Web link survey (screen pop) linked to chat
- Configured by a rule visibility checkbox for chat
- Chat enabled surveys become an option when setting up chat rules

