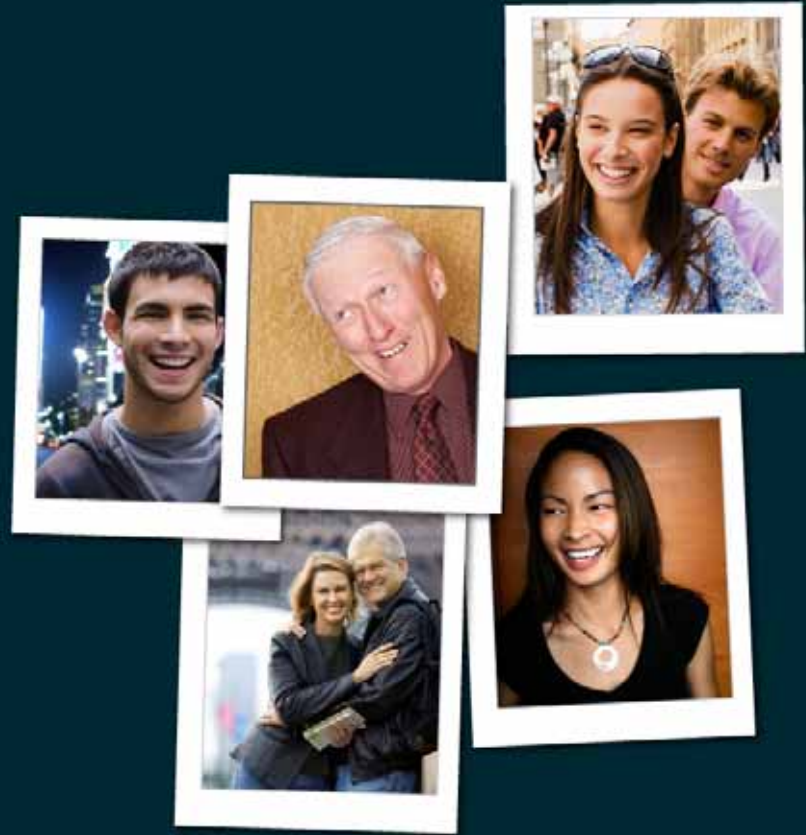




SUMMIT 08



ADVANCED FEEDBACK

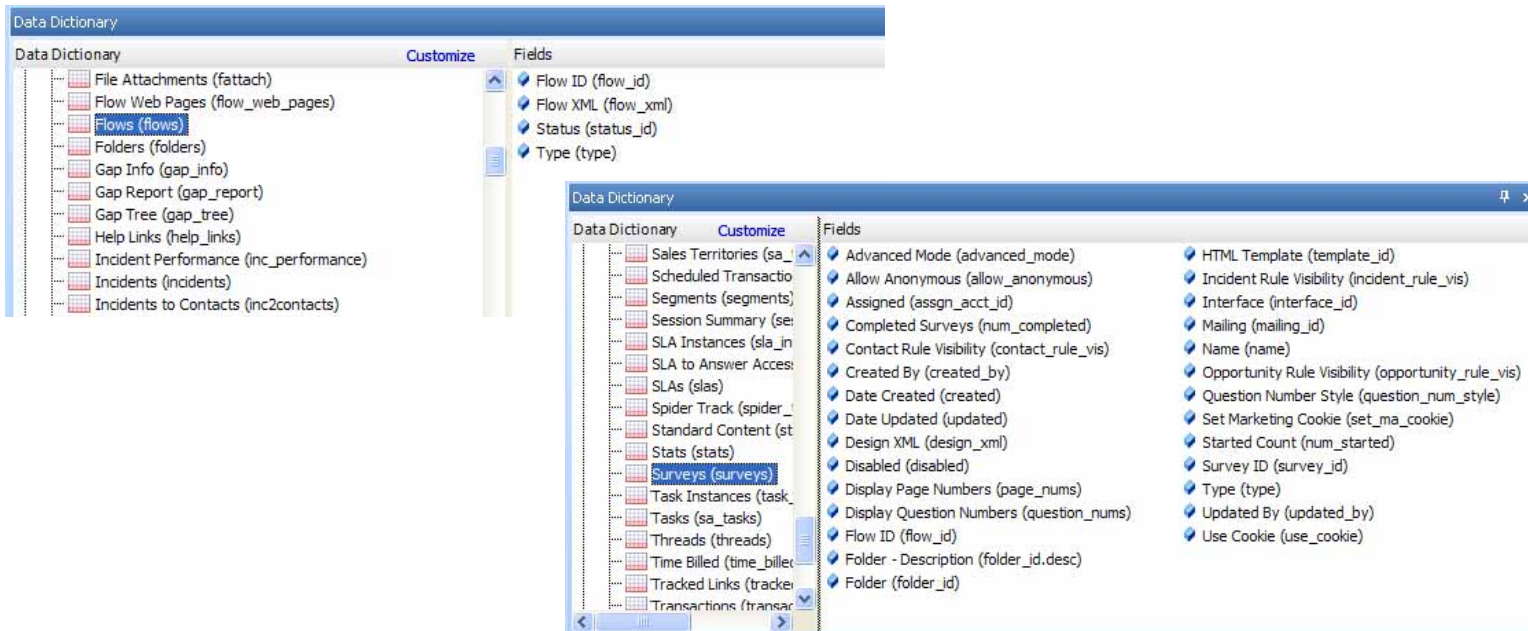
Aaron Schubert ([aschubert@rightnow.com](mailto:aschubert@rightnow.com))

**RIGHT**  
**NOW.**

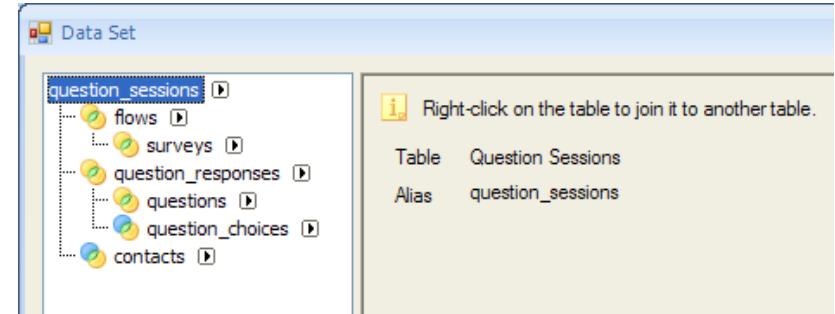
- Feedback Analytics
  - The nuts and bolts that comprise a survey
  - Database representation of response data
  - **Objective**: Ability to clearly understand and analyze survey results
- Personalizing Your Content
  - Utilizing content capabilities via the 'Add HTML Content' option
  - Examples showing dynamic survey content
  - **Objective**: Maximize survey effectiveness by improving customer experience
    - Advanced survey presentation
    - Making response information actionable
- Identifying Your Audience
  - Exploring the use of segments
  - **Objective**: Learn how to properly identify the survey audience
- New Feature Snapshot
  - A quick look at the new Feedback features in '08

- What comprises a survey???
  - Questionnaire
    - Each page in the questionnaire is analogous to a document in the system. The questionnaire can contain survey questions, conditional sections, merge fields, tracked links, as well as any html content.
  - Flow
    - The flow describes the business rules that are defined which evaluate decisions and execute triggered actions. The flow effectively defines the way a user moves throughout the system.
  - Mailing (NA for website link survey)
    - Invitation message: Email message delivered to the contact which contains a link to the survey. Also represented as a document in the system.
    - Audience: Combination of segments and lists create the audience for a survey.

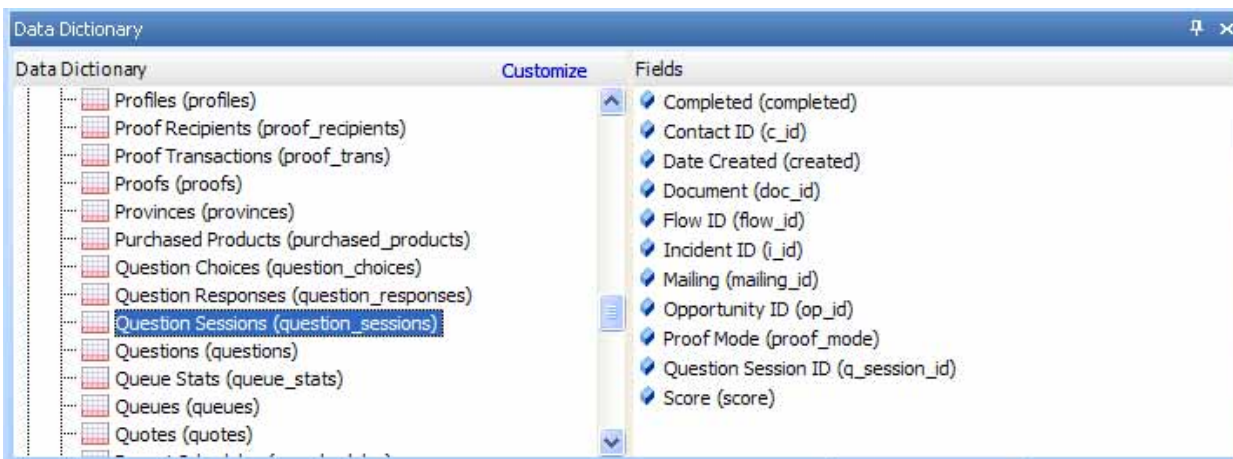
- How are survey results logged to the database?
  - The flow is the key
    - Results are stored as question\_responses tied to flow\_id in the database.
    - This makes it possible for any object referencing a flow to log results to survey questions. Currently, campaigns are the only other object utilizing flows.



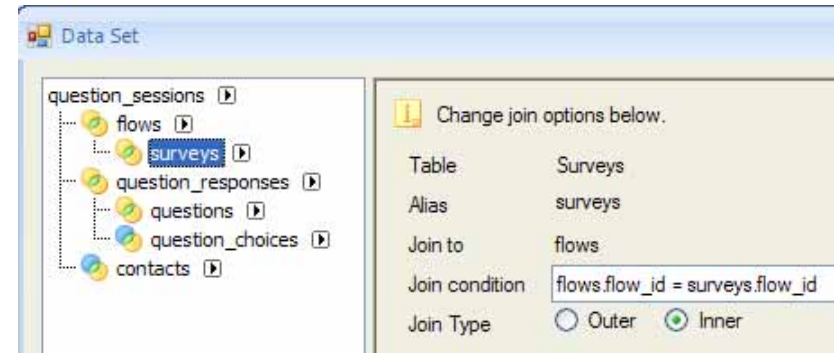
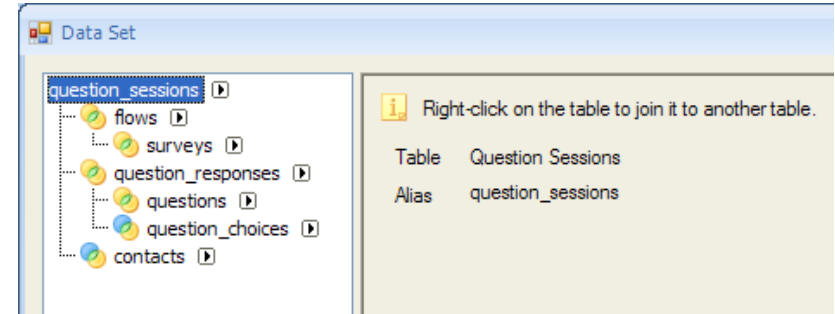
- Survey Responses By Contact
  - Added in Nov '07
  - Smaller data sets



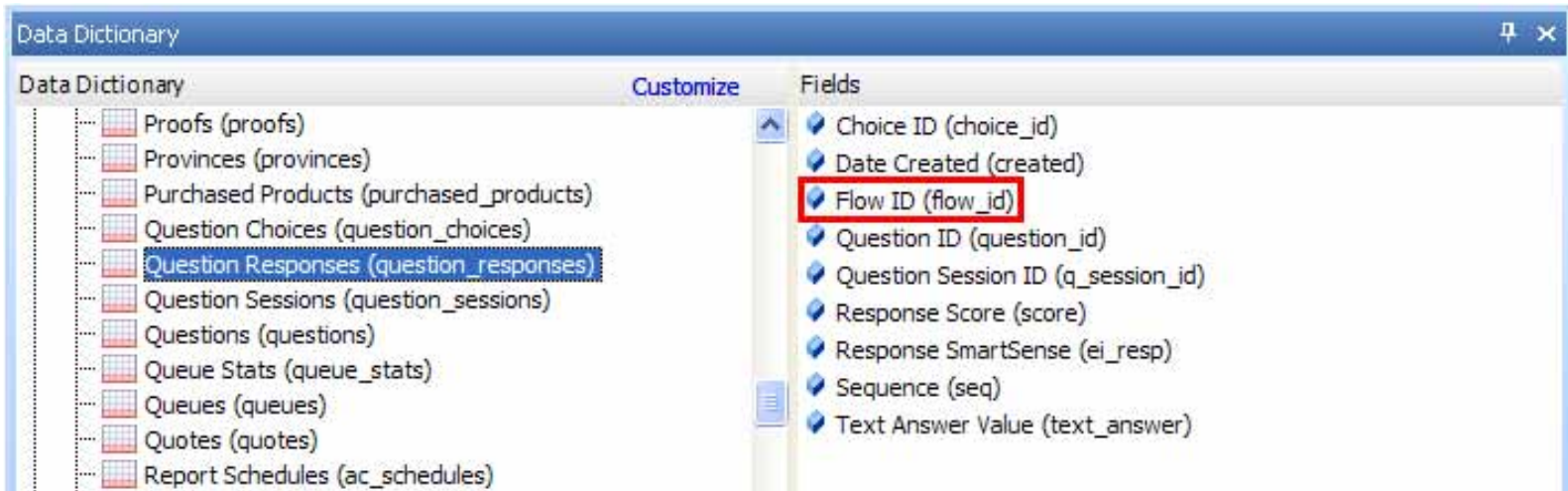
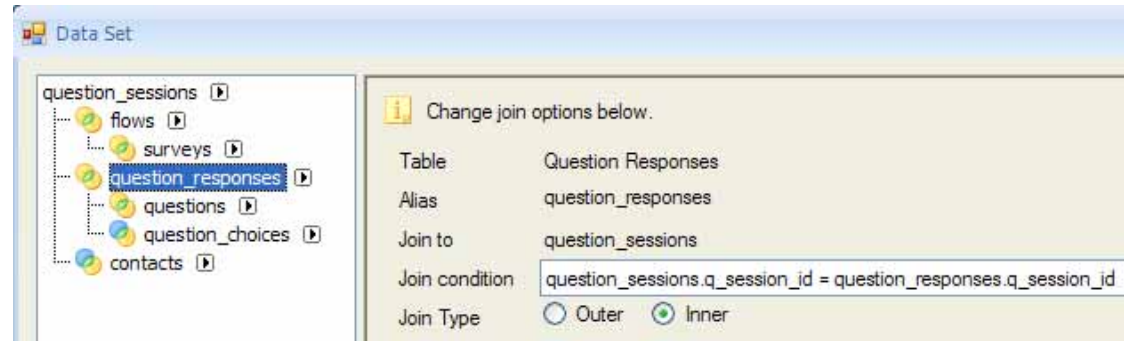
- Question Sessions (question\_sessions)
  - Session created upon submit of the first page of a survey
  - Stores i\_id, op\_id, chat\_id, proof\_mode



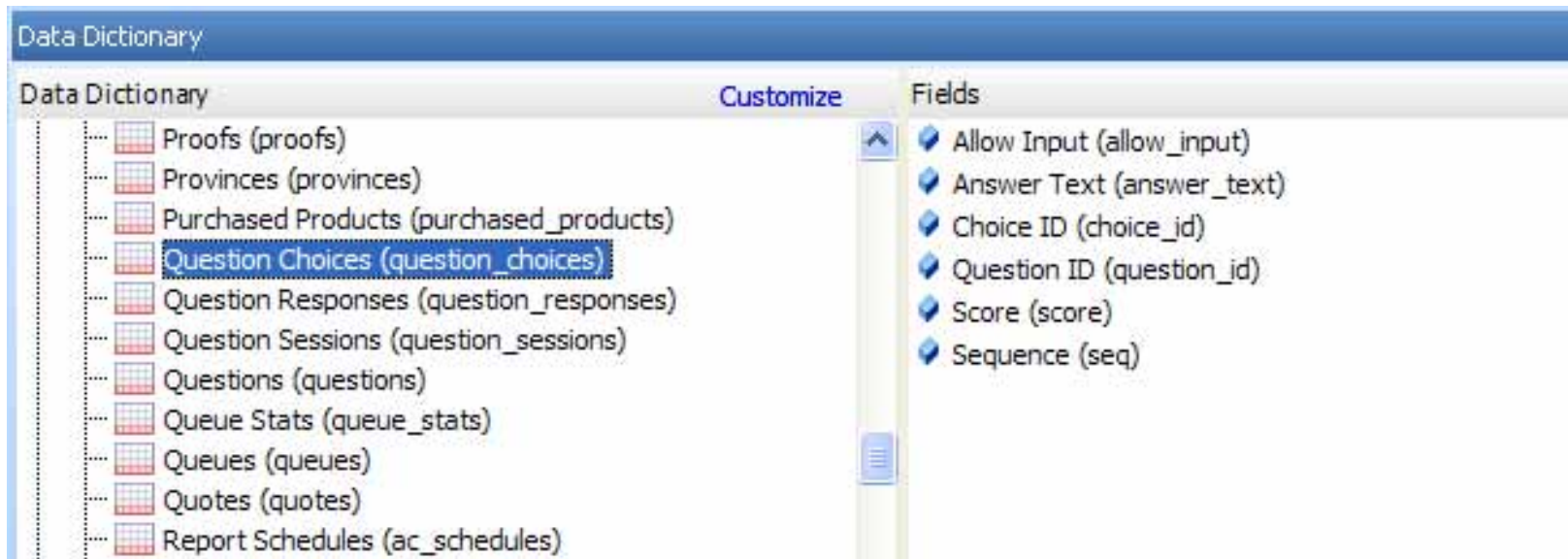
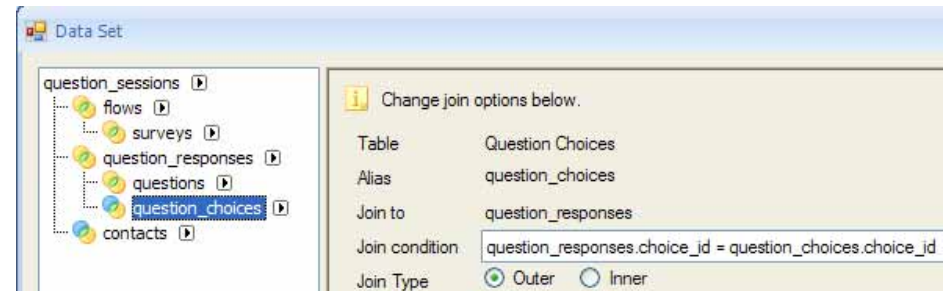
- We obviously join to the flows table as we know that is the 'key'.
- If flows are important why join to surveys?
  - The runtime filter selected by the user will be the name of the survey.



- A question\_response row is entered for each question answered.
  - flow\_id still rules

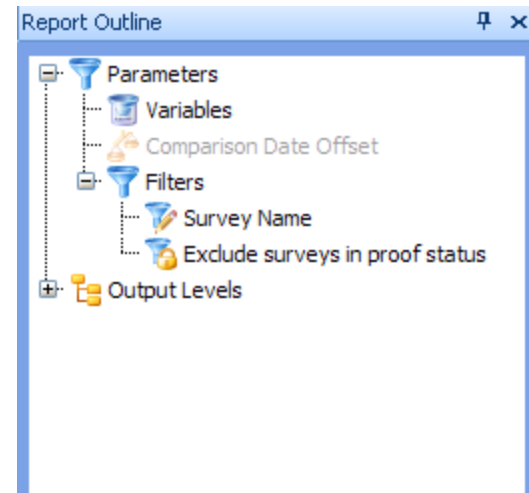
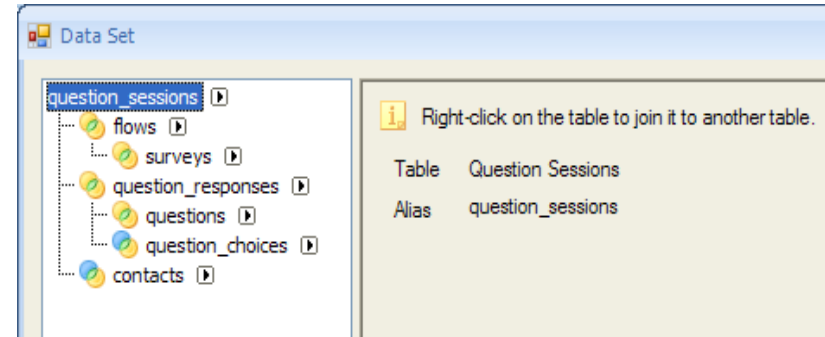


- Why the outer joins to the question\_choices and contacts tables?
  - Text type questions do not have choices. This ensures the retrieval of all responses.
  - Not all question\_sessions have associated contact id's (allow anonymous).

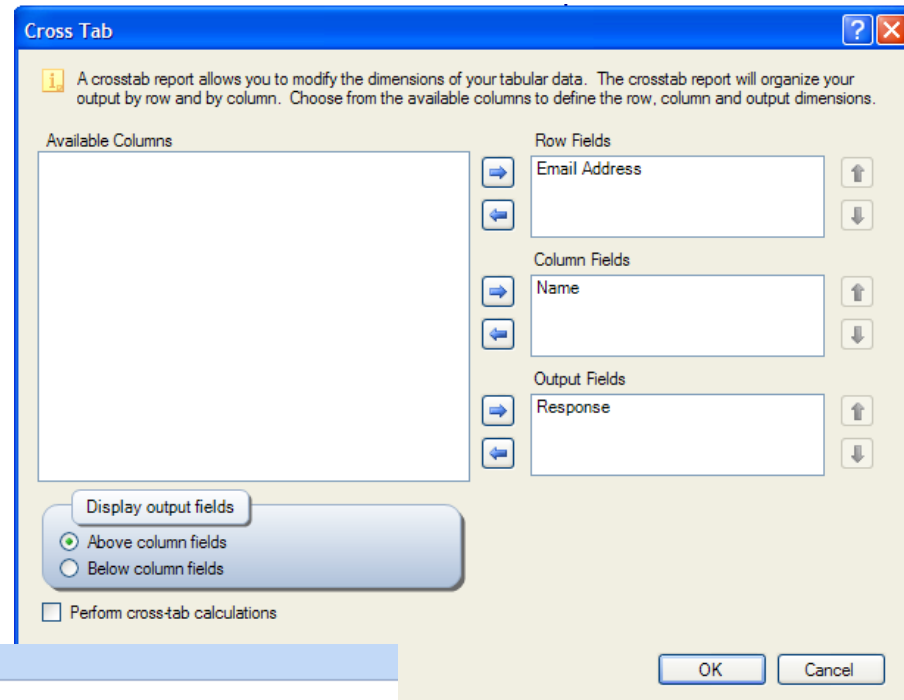


- Filters:

- surveys.survey\_id = 'prompt user'
- question\_sessions.proof\_mode != 1
  - By default all canned reports include this filter so that responses taken in proof and preview mode are not counted in the results.
  - These proof/preview results are deleted by agedatabase one week after they are logged.



- Output Columns:
  - Email Address  
contacts.email
  - Date Created  
question\_sessions.created
  - Response  
if(length(question\_responses.text\_answer)>0,  
question\_responses.text\_answer,  
question\_choices.answer\_text)
  - Name  
questions.name



Survey Responses By Contact

## Survey Responses By Contact

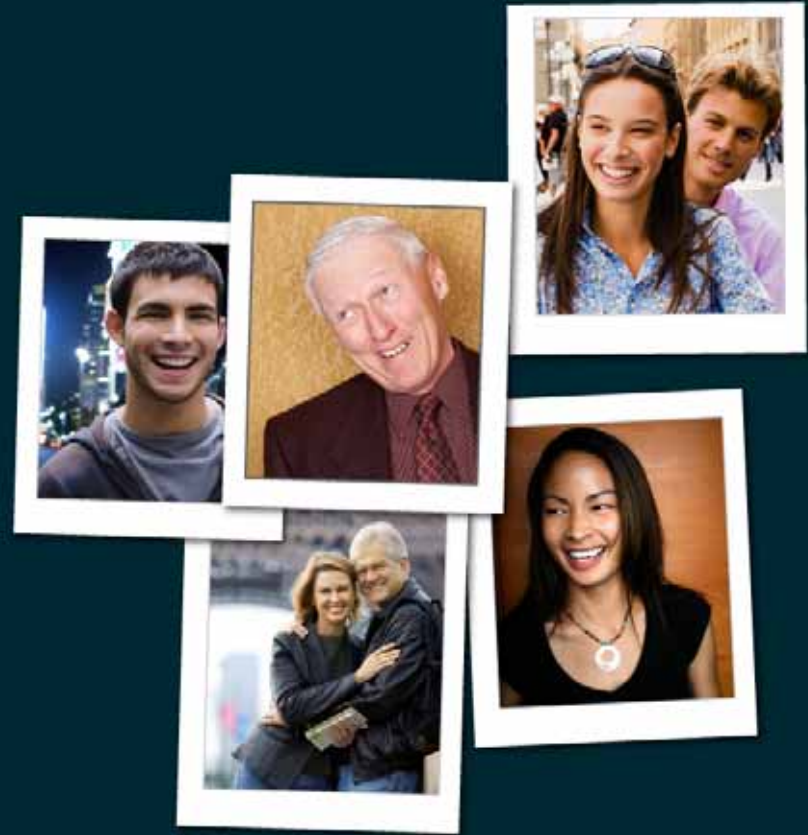
Response

Email Address	Service Comments	Service Rating
aschubert@rightnow.com	Service was supurb. Keep it up!	10 - best
cfrederickson@rightnow.com	The agent was very helpful.	9
hard_to_please@rightnow.invalid	The agent solved my problem but wasn't as upbeat as I would expect	7
family_impacient@rightnow.invalid	I was put on hold for at least 15 seconds. I would appreciate less wait time in the process.	7

Record Count: 4



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DEMO REPORTS OF INTEREST

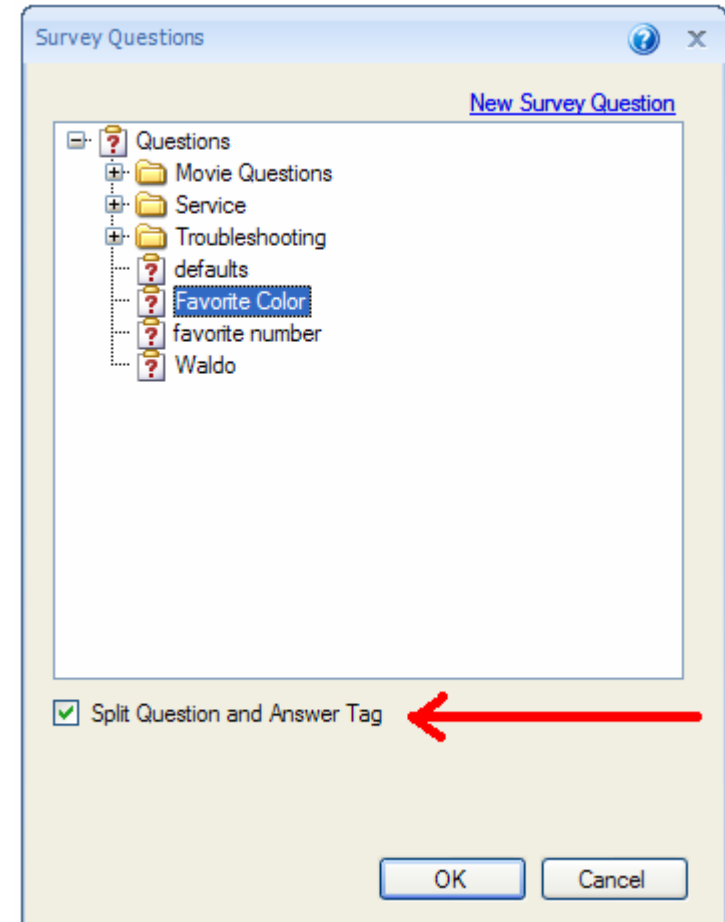
Aaron Schubert ([aschubert@rightnow.com](mailto:aschubert@rightnow.com))

**RIGHT**  
**NOW.**

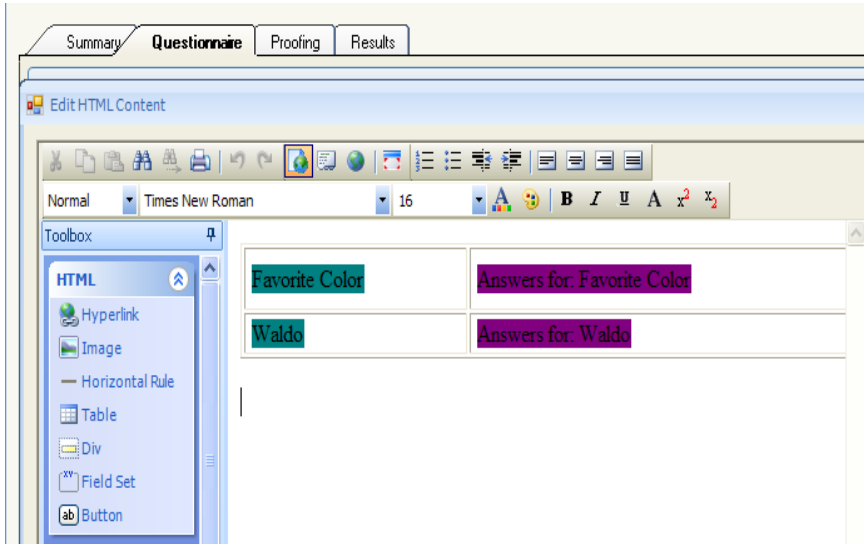
- Maximizing the effectiveness of the survey presentation
  - Applying templates
  - Split question functionality
  - Proper usage of form fields
  - Dynamic content
    - » Conditional sections
    - » Expanded dynamic content offering available in August '08
- Making valuable response information actionable
  - Example to illustrate how these concepts work together to provide valuable information to service agents



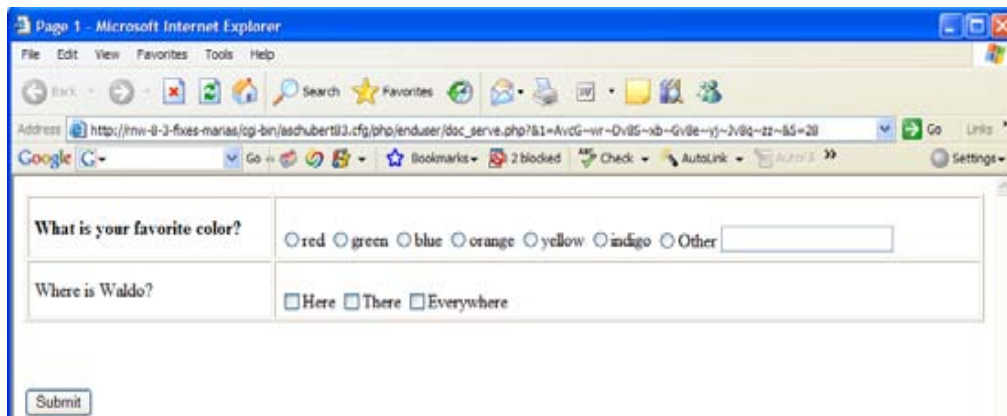
- From Questionnaire Tab
  - Add HTML Content
  - Add Survey Question
  - Check the 'Split Question and Answer Tag' in the dialog
  - Question and answer tags should show up separately



# SPLIT QUESTION/ANSWER EXAMPLE

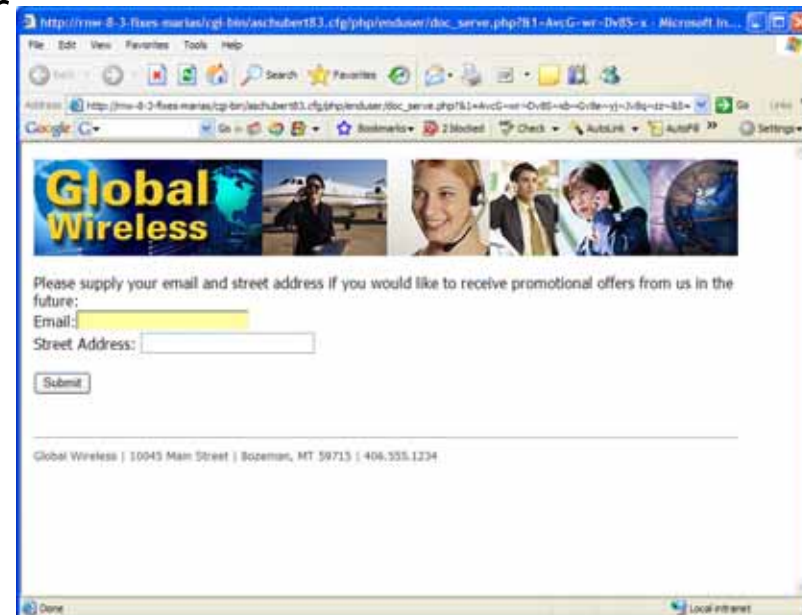
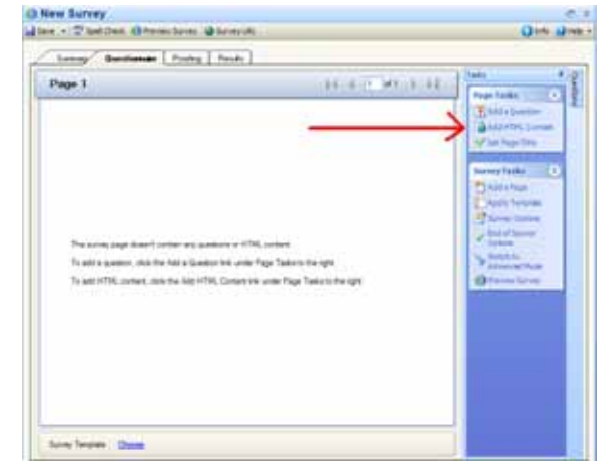


- Split question inside a table
  - HTML editor content display

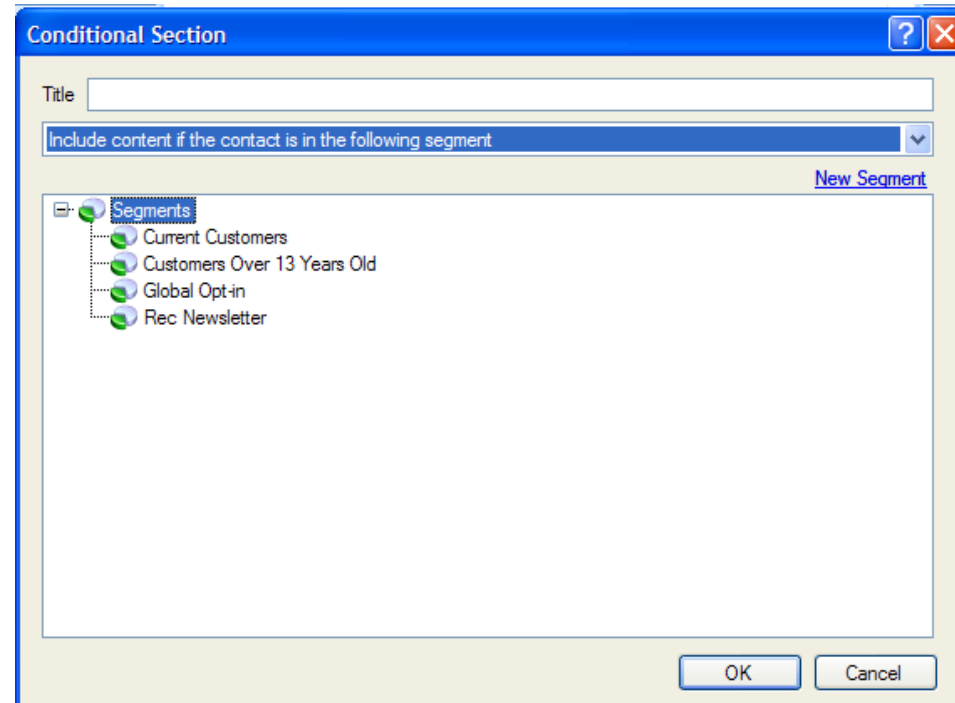


- Runtime representation of the split question in a table.

- Adding form fields
  - From questionnaire tab choose to 'Add HTML Content'
  - Click 'Form Field' from 'Forms' toolbox and select appropriate field in dialog
- Form fields allow the survey organizer to collect contact information about those taking the survey.
- It is also possible to associate otherwise unrecognized contacts to a valid contact record (email).
  - Useful for website link surveys



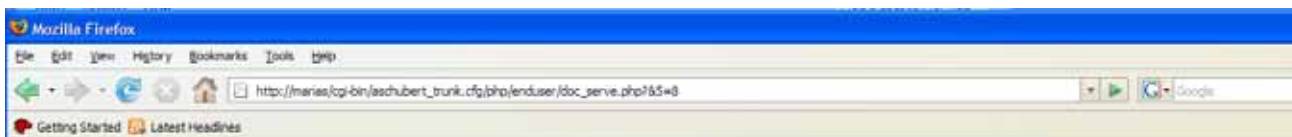
- Adding conditional sections
  - From questionnaire tab choose to 'Add HTML Content'
  - Click 'Conditional Section' in the 'Dynamic Content' toolbox
- How do conditional sections work?
  - Utilize segments to determine whether content should be displayed
  - Option to include content if contact is 'In' or 'Not In' the defined segment
  - Examples to come...



- Allowing attributes from question/field tags to pass through into the personalized content provides an avenue which can be utilized to create content rich survey pages.
- Example use cases include the following:
  - Populating a (hidden) custom field based on the user's response to a survey question. Can be done with text or choice type questions.
  - Hide content until deemed necessary. Content can become visible based on user's actions.
  - Disable a question or form field until a user takes appropriate action that warrants enabling the field.

# EXPANDED DYNAMIC CONTENT (EXAMPLE)

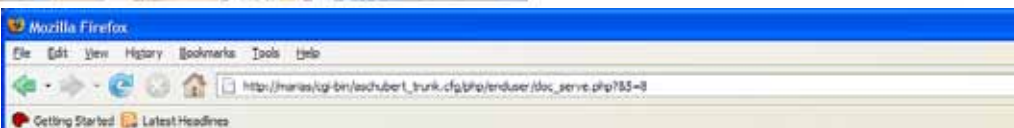
RIGHT  
NOW.



How would you like to be contacted?

Submit

Global Wireless | 10045 Main Street | Bozeman, MT



How would you like to be contacted?

Email

Phone

None

Global Wireless | 10045 Main Street | Bozeman, MT



How would you like to be contacted?

Email

Please enter your email address:

Submit

Global Wireless | 10045 Main Street | Bozeman, MT 59715 | 406.555.1234

# EXPANDED DYNAMIC CONTENT (EXAMPLE)

RIGHT  
NOW.

The image displays three sequential screenshots of a Microsoft Internet Explorer browser window, illustrating how dynamic content is updated based on user input. The browser's address bar shows the URL: `http://maria/cg-bin/ashubert111.cfg/php/enduser/doc_serve.php?1=AvcG-wqdDv855x7-Gjle-yLRJvsq-y7-Hv9T-zr-85=2186=187=140`.

**Top Screenshot:** The survey question is "How would you like to be contacted?". The radio button for "Phone" is selected. A "Submit" button is visible at the bottom.

**Middle Screenshot:** After clicking "Submit", the form updates. The "Phone" radio button is now selected. Below the question, it says "Our records have your number listed as: 406-446-3377". A "Submit" button is at the bottom.

**Bottom Screenshot:** After clicking "Submit" again, the form updates further. The "Phone" radio button is selected. Below the question, it says "Home phone number:" followed by a yellow highlighted input field. A "Submit" button is at the bottom.

- Combining forces
  - New expanded dynamic content functionality paired with conditional sections allows for greater survey personalization

- Let agents make a difference
  - Place important survey response information directly on the agent workspace giving them insight to the customer's last experience with the company
  - Can set custom contact fields equal to the value of either a choice or text type survey question

080909-000002

Subject\*

Reference # 080909-000002

Status\* Unresolved

Assigned Administration Administrator -

Customer Experience It felt like the agent was more concerned with getting me off the phone than actually solving my issue.

Contact\* [Aaron Schubert](#)

Organization Name

Product\* [No Value]

Category\* [No Value]

Messages | Details | Organization | Contacts | Session (0) | Attachments | Audit Log

Send On Save | SmartAssistant | Search Knowledgebase | Standard Text | A+

Add

- How did we do it?
  - First added the customer experience survey question and custom form field via 'Add HTML Content'.
    - Viewing the source tab shows the following:

```
<p><rn:question split="False" question_id="11">Service Comments</rn:question></p>  
<p><rn:field checkbox="false" required="false" field_id="34" tbl="2">Customer Experience</rn:field></p>
```
  - Modify the source to add a hidden div around the form field to hide it from the user. Also add an 'onchange' event to the question which references the field\_id used in the custom form field.

```
<p><rn:question split="False" onchange="_main.wf_2_34.value = this.value" question_id="11">Service Comments</rn:question></p>  
<div style="display:none;"><p><rn:field checkbox="false" required="false" field_id="34" tbl="2">Customer Experience</rn:field></p></div>
```
  - Add the Customer Experience Custom field to the Incident Workspace

080909-000002

Subject\*

Reference # 080909-000002 Contact\* [Aaron Schubert](#)

Status\* Unresolved Organization Name

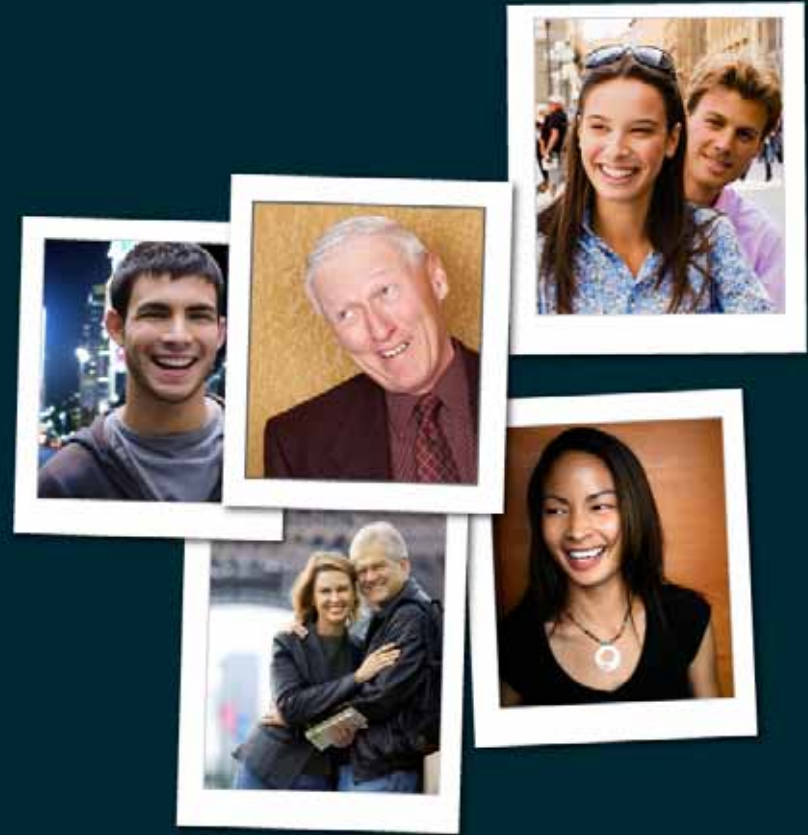
Assigned Administration Administrator - Product\* [No Value]

Customer Experience it felt like the agent was more concerned with getting me off the phone than actually solving my issue. Category\* [No Value]

Customer Experience  
Customer's previous survey response concerning customer experience

Message

# SUMMIT 08



## IDENTIFYING YOUR AUDIENCE (SEGMENTS)

Aaron Schubert ([aschubert@rightnow.com](mailto:aschubert@rightnow.com))

**RIGHT  
NOW.**

- What is the difference between a segment and a list?
  - A list represents a static collection of contacts
  - A segment represents a dynamic collection of contacts based on information stored in the database
    - Contacts will enter and leave the segment based on their interactions in the system
- How are segments used in the product?
  - Conditional sections
  - Broadcast surveys (include / exclude)
  - Transactional surveys (exclude)
- Examples...

# BROADCAST SURVEY (INCLUDE SEGMENT)

- I want to send a survey to everyone who has purchased the PhishPhone in the last 6 months.
  - Analytics?
  - Contacts table is the root

The image shows two overlapping 'Edit Filter' dialog boxes. The top dialog box has a 'Name' field, a 'Definition' tab, and a 'Use Data Dictionary' link. The 'Expression\*' field contains 'sa\_products.product\_id'. The 'Operator' is set to 'equals' with a note '(Use this to compare the Expression with the Value)'. The 'Value Type' is 'Constant' (selected) and 'Expression'. The 'Value' is 'PhishPhone'. The bottom dialog box is similar but the 'Expression\*' field contains 'purchased\_products.purchase\_date'. The 'Operator' is 'greater than' with the same note. The 'Value Type' is 'Constant' (selected) and 'Expression'. The 'Value' is '-6 Months Exactly' with a calendar icon. There is a checked 'Relative' checkbox. Both dialog boxes have 'OK' and 'Cancel' buttons at the bottom right.

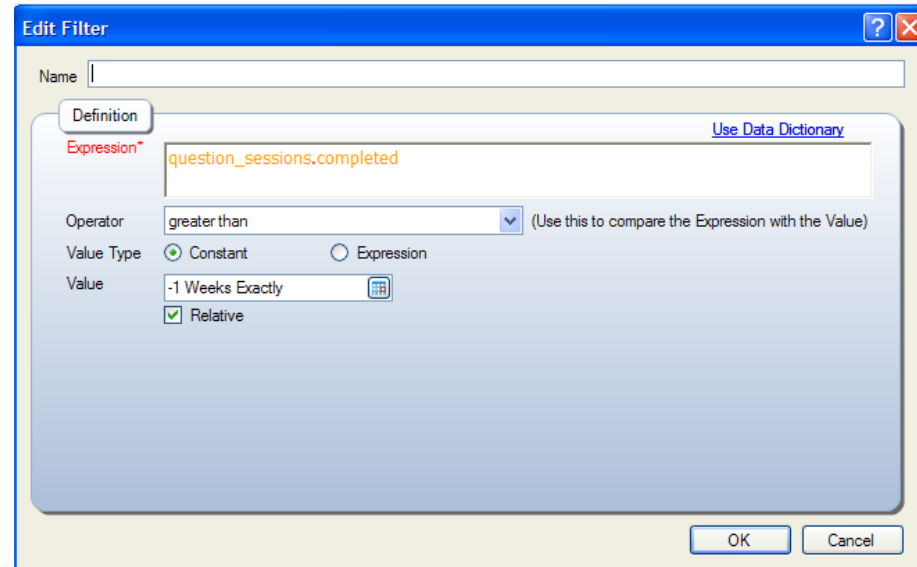
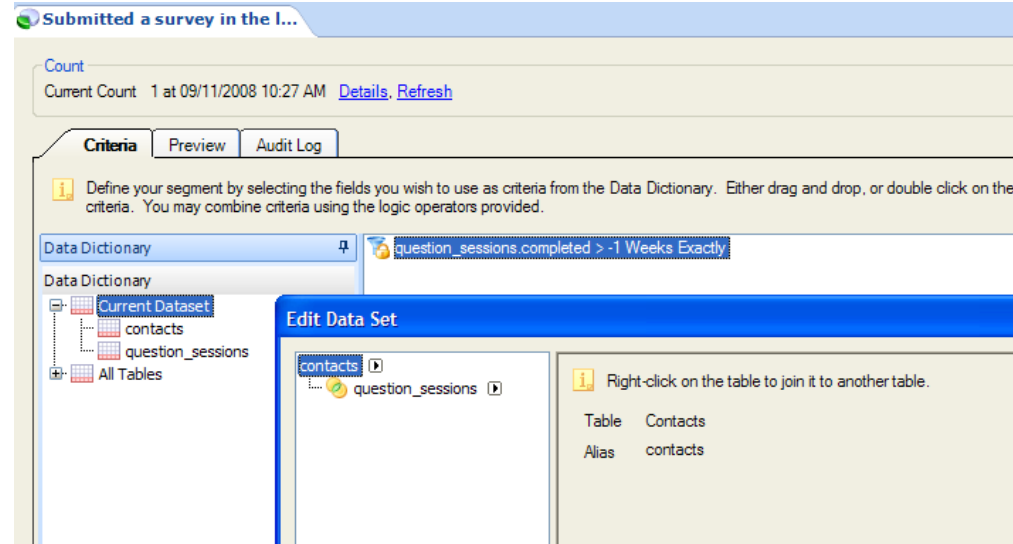
The 'Edit Data Set' window shows a tree view on the left with 'contacts' selected, containing 'purchased\_products' and 'sa\_products'. On the right, there is an information icon and the text 'Right-click on the table to join it to another table.'. Below this is a table:

Table	Contacts
Alias	contacts

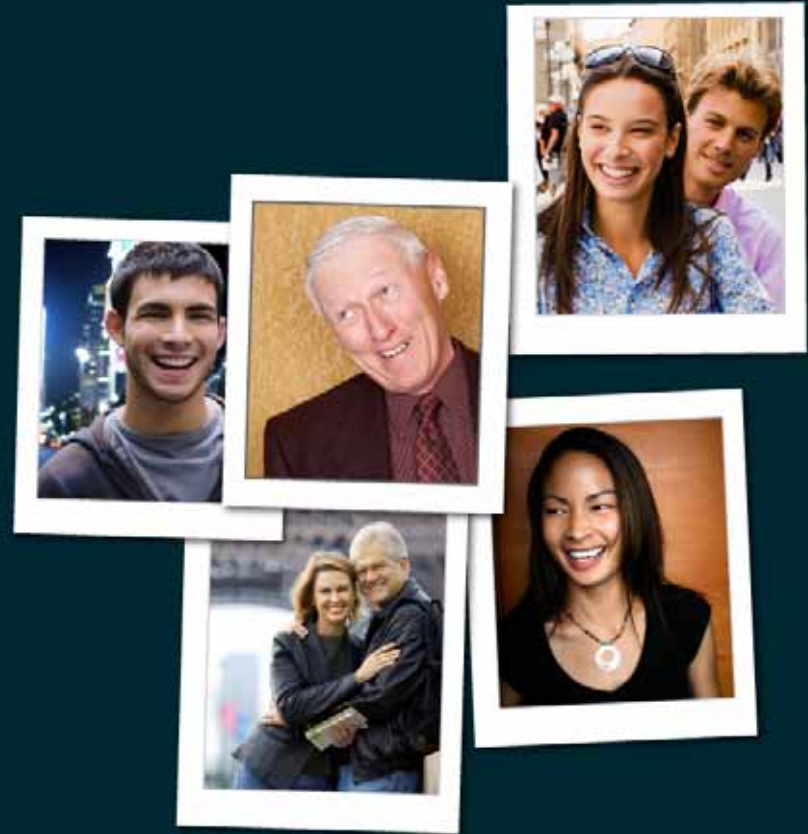
At the bottom right of the table area is a 'Delete Table' link.

# TRANSACTIONAL SURVEY (EXCLUDE SEGEMENT)

- I don't want to send a closed incident survey to anyone that has completed one in the last week.
  - High volume customers skewing overall results
  - Less likely to fill survey out - avoid over communicating



SUMMIT 08



RIGHTNOW FEEDBACK '08 HIGHLIGHTS

Aaron Schubert (aschubert@rightnow.com)

**RIGHT  
NOW.**

- Topic Monitoring

- At its core, topic monitoring utilizes an algorithm which groups responses into clusters based on their similarity in terms of the words they contain

- Hierarchical
- Lowest levels contain similar responses

topic

Summary Questionnaire Proofing Results

Open Options

## Topic Monitoring

Theme Name	Responses	Average SmartSense	Theme Definition
Products	12	100%	Details
phone	9	75%	Details
Agents	3	75%	Details
Dissappointed	3	50%	Details
Other	3	75%	Details
service	2	50%	Details

Change Results Report

Tasks

- Cluster Responses
- Reset Clustering
- Edit Themes
- Clustering Wizard

- Chat Surveys
  - Surveys can be managed through chat rules.
    - Send survey on chat completion
    - Pop survey on chat completion
    - Pop survey when chat request cancelled

**Edit Chat Rule**

Editing Rule in State: initial

Rule Name:

Notes:

**If**

1 Incident Product equals

- Mobile Phones
- Voicemail Services
- Replacement/Repair Coverage
- Unspecified

Add condition based on:

**Then**

Add Act

**Else**

Add Act

Save Cancel

Compile Activate

Chat Queue ID

Set Variable

Send Survey when Chat completes

Pop-up Survey when Chat completes

Pop-up Survey when Chat Request Canceled

Terminate Chat Request

ReQueue Chat request in

Stop Processing Rules

Call Function

Transition State and stop

Transition State and continue

- Survey By Proxy
  - Effectively a new channel
    - Workspace availability
      - Contact
      - Incident
      - Opportunity
- Dynamic Content

080723-000001

Subject\* broken phone

Reference ID 080723-000001 Contact\* [Axon Schubert](#)


Status\* Unresolved Organization Name

Assigned Administration Administrator Product\* Voicemail Service

Disposition [No Value] Category\* Long Distance

Priority [No Value] Last Survey Score None

Messages Details Organization Contacts Session (0) Attachments Audit Log **Closed Incident Survey**



How would you rate our service?

10 - best

9

8

7

6

5

4

3

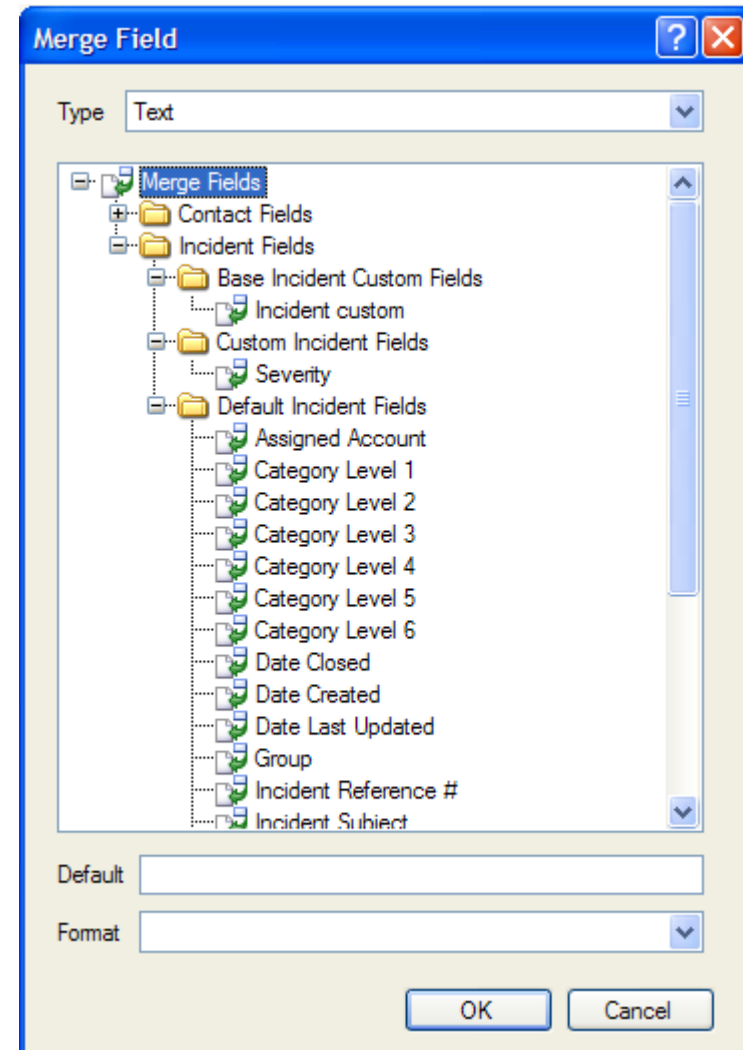
2

1 - worst

Please provide any additional comments or feedback:

Submit

- Incident Merge Fields
  - More personalization of outgoing survey invitation messages
- Resume Survey Capability
- Survey Expiration Date
- Additional Canned Reports





SUMMIT 08



ADVANCED FEEDBACK

Aaron Schubert ([aschubert@rightnow.com](mailto:aschubert@rightnow.com))

**RIGHT**  
**NOW.**