



SUMMIT 08



KEYS TO THE RIGHT RESPONSE
EMAIL & INCIDENT MANAGEMENT

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RIGHT
NOW.

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- 4 years Customer Relationship Management implementation experience including RightNow and Salesnet
- 10 years software implementation experience, including business analyst, system analyst, quality assurance and project manager

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- Expert resource on the implementation of the RightNow product
- 10 years Customer Relationship Management experience at various levels including technical support, quality assurance, business analysis, project management and implementation

What are the keys to the right response?

➤ Email Management

- SPAM Management
- Workflow Rules

➤ Incident Management

- Goals of Successful Incident Management
- Service Level Agreements
- Incident Workflow Rules
- Guided Assistance
- Incident Resolution

➤ Questions and Answers

Who do we have in the audience?

- How many participants are currently using RightNow for Incident or Email Management?
- How many participants are on version 8.x? (May or August 08)
- How many participants are currently in an evaluation stage?
- How many participants are responsible for the configuration of the RightNow product?

Enable agents to deliver top-quality answers to customers by providing agents with top-quality tools!

Ensuring RightNow is most effectively configured in the following areas:

1. Email SPAM Management
2. Email & Incident Workflow Rules
3. Service Level Agreements

Providing agents with the ability to deliver top-quality answers:

1. Embedded Knowledge Engine
2. Guided Assistance
3. Pre-defined responses with Standard Text and Variables

Why is SPAM filtering necessary?

- Barracuda Spam- Your 1st Line of Defense
 - Emails pass through 12 defense layers of the Spam Firewall
 - During the filtering process, emails are checked for new and familiar spammer attacks, viruses, and customized administrator policy violations.

➤ TAG Scores

- TAG: Used to identify potential spam

➤ Quarantine Scores

- Quarantine: If a message has a score above the default value of 9.0 the Barracuda appliance will put #QUAR# in the subject.

➤ Block Scores

- Block: If this is set to a value other than 10, any message with a spam score greater than the block score is not delivered or quarantined.

- When changing Spam settings, think “Lather, Rinse, Repeat”
- Use Whitelist/Blacklist feature
- Use the Discard feature on your support mailboxes

- Understand Techmail runs every 15 minutes, so there is a small lag in retrieval.
- Including email headers for incidents created from email (EGW_SAVE_EMAIL_HEADER)
- Use an Auto-Reply for incident submitted via email that sends the person back to your support site
- Route Emails based on Mailbox or Email Header. (Remember to set an interface value if working with multiple interfaces)

➤ Goal of Incident Management

- Resolve a customer's issue as quickly as possible to minimize the customer's impact; thereby ensuring the best possible levels of service quality are maintained?

➤ How do you ensure you have successful incident management processes?

- Document Incident Processes
- Implement the documented Incident Processes in Incident Workflow Rules
- Build Escalation Rules to notify the appropriate supervisor and/or managers
- Configure & utilize Service Level Agreements
- Train agents to use the knowledgebase within the Console
- Use Incident Disposition!

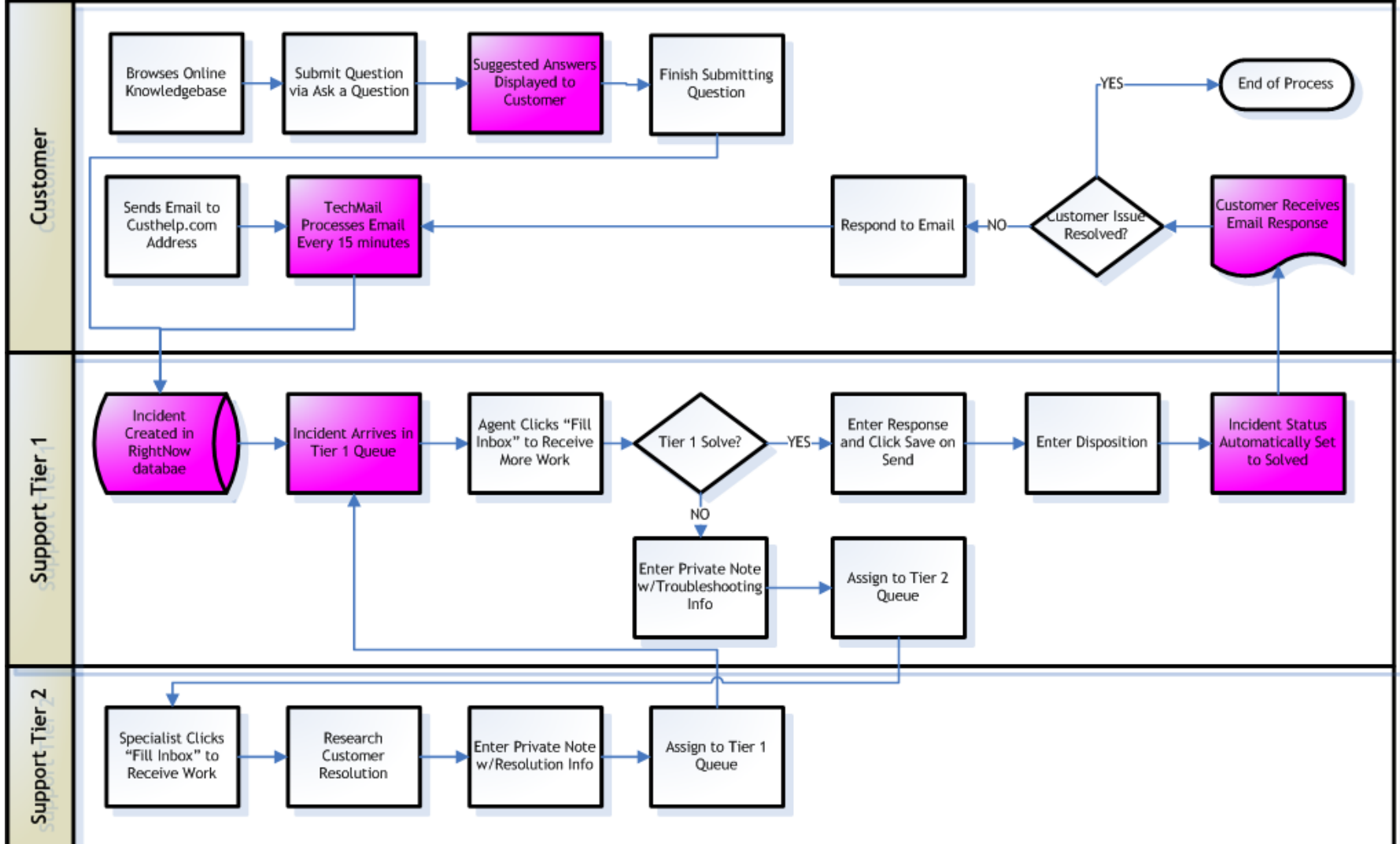
- What is a Service Level Agreement?
 - A contract that specifies the level and type of customer service a customer is eligible to receive
 - Applied to either an organization or a stand-alone contact

- How are Service Level Agreements effective?
 - Limit a customer's ability to submit different types of incidents (Chat Incidents, Email Incidents, Ask a Question incidents - even total number of incidents!)
 - Specify a Length of Time
 - Define Response Requirements
 - Apply Access Levels (using privileged access)

- Document Incident Workflow
- Ensure all Queues, Staff Accounts, Custom Fields and Profiles are in place.
- Create a minimum of two (2) states.
- Use Smart Assistant
- Incident Catch All Rule
- Transition States

Incident Workflow Diagram

Example Incident Workflow Process



- Two (2) rules are required for each escalation action
 - Chain Rule: defines the condition & sets the escalation level
 - Action Rule: performs the actions

- Order of Escalation Rules
 - Action Rule first
 - Chain Rule second

- Multiple Escalation Rules

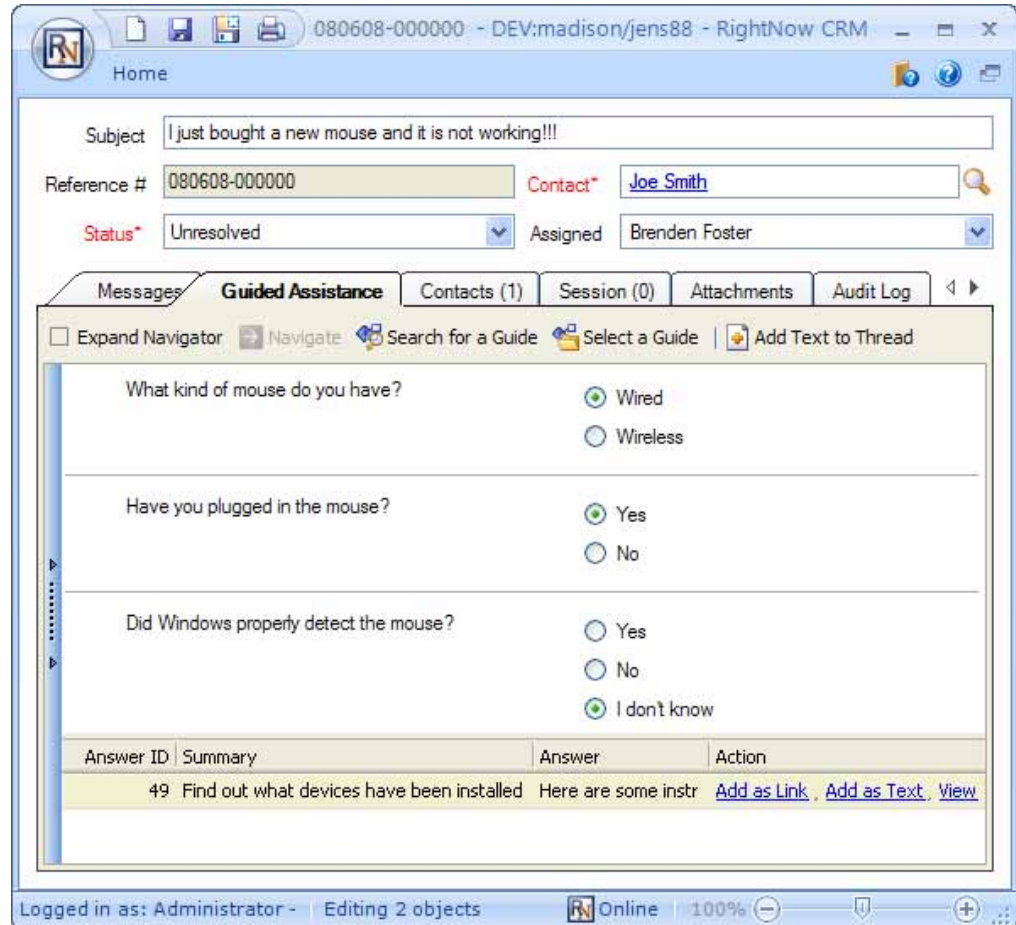
Overview

- Alternative Knowledgebase Searching Mechanism
- Question Branches
 - Visual Guidance, including Images
 - Interactive Guidance, prompting agent for additional info
 - Knowledgebase Resolution OR Text Escalations

Why it Matters

- Reduces agent training time
- Enables consistent handling of complex customer issues
- Model the best practices of your best agents
- Improves resolution times by guiding the agent to the right answer - the first time
- Improves the customer experience by enabling faster resolution, fewer transfers

- Walk through a demonstration of guided assistance



- Smart Assistant
 - Within the Incident Workspace
- Search Knowledgebase
 - Modifying Report to provided visibility to Internal Answers
 - Add as Link within Response
- Standard Text
 - Build Standard Text for Redundant Responses to Customers
 - Use folders to organize standard text.
 - Use unique names for each standard text

*NOTE: Standard Responses are NOT knowledgebase answers.
Standard Responses can reference knowledgebase answers.*
- Incident Disposition
 - Require for Incident Resolution

