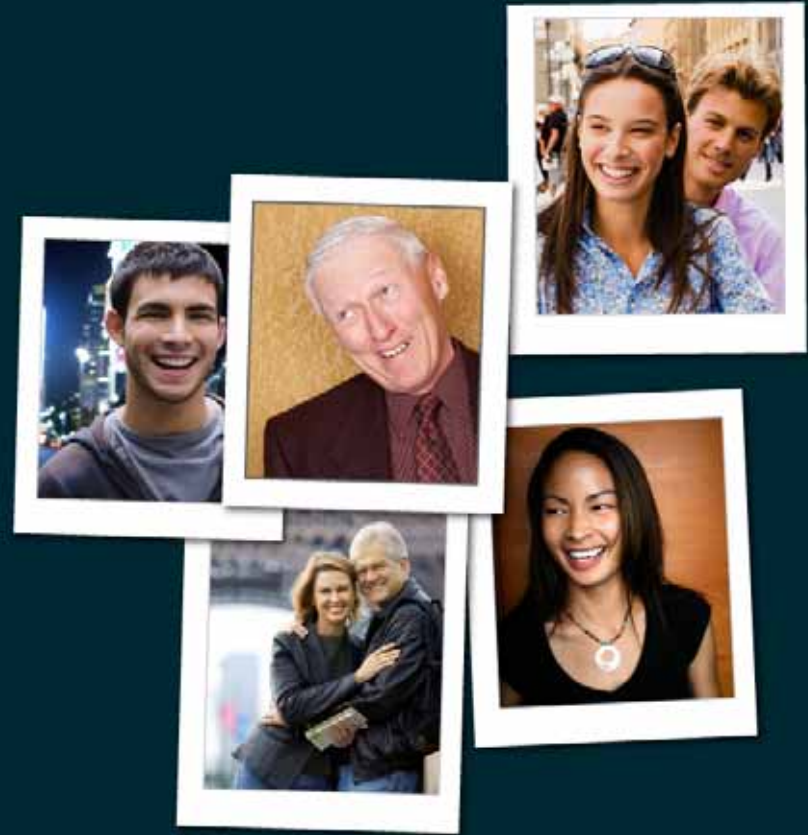




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ENABLING MULTI-CHANNEL CONTACT CENTER RIGHTNOW AGENT DESKTOP CAPABILITIES

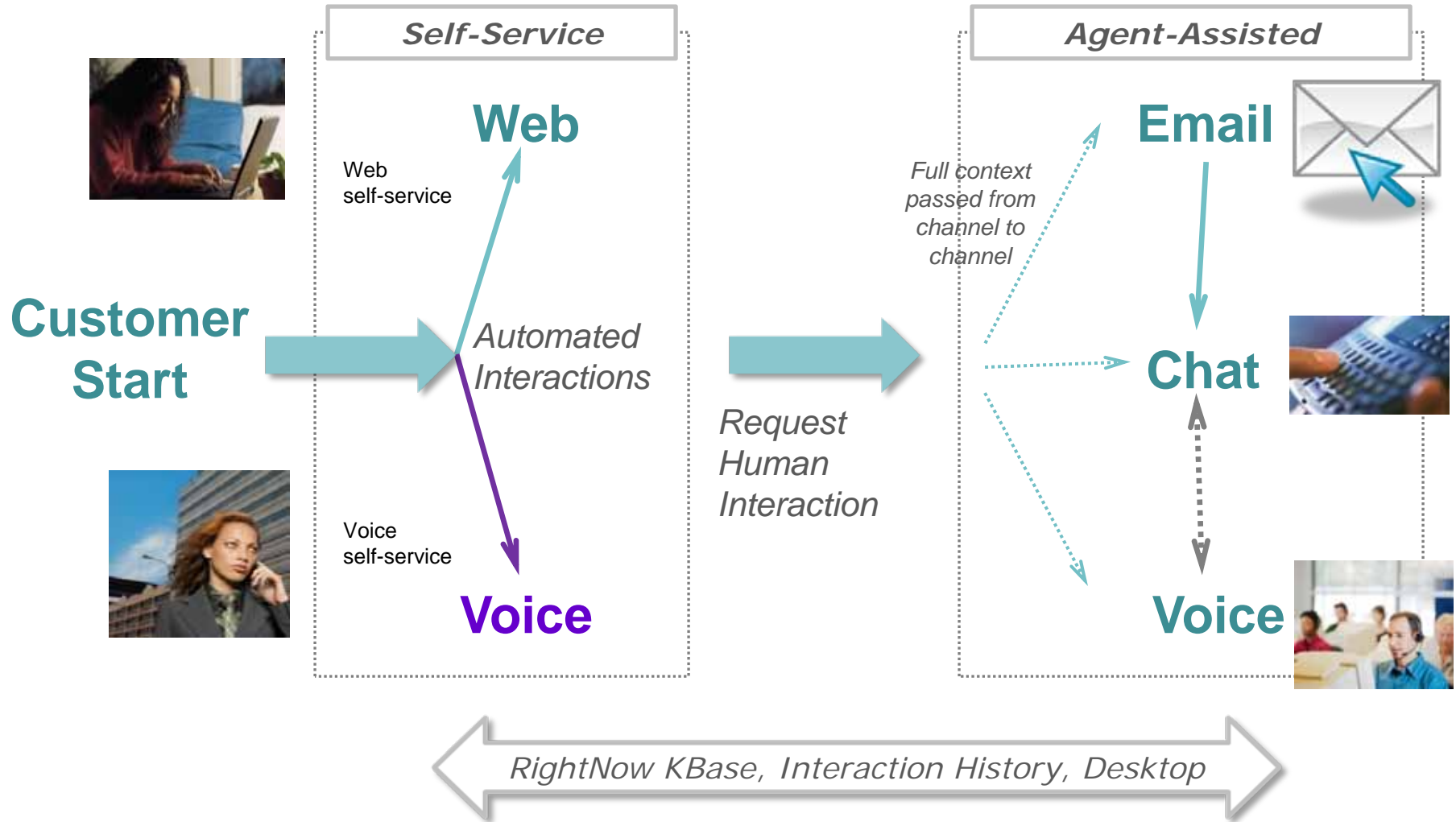
Chris Hamilton - Director, Product Management, Core Technology
Stephen Michael - Director, Product Management, Contact Centers

**RIGHT
NOW.**

- The Multi-Channel Contact Center
 - Trends
 - Email, Web, Chat, VSS/IVR, Phone
 - Solving the telephony challenge in the Contact Center
- The Contextual Agent Desktop
 - Contextual Workspaces
 - Guided Assistance
 - Scripting
 - Future Enhancements
 - Agent Desktop Demo

- Offering multi-channel choice
 - Move from web self-service to multi-channel service
 - New channels gaining adoption - chat, voice self-service, forums
- Service is the new Sales
 - Do Not Call
 - CAN-SPAM regulations
 - Quotas
 - Leveraging service conversation to cross-sell/up-sell
- Augment traditional agents
 - Provide targeted expertise to resolve issue or deliver high value customer experience
 - Home-based growing
 - Peak time staffing
 - Specific skills/domain expertise/desirable cost structure
- Growth in community interactions/influence
 - Forums, IM, blogs, and social networking sites

From Self-Service to Agent Assisted Service



Integration Options & Tools



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Light-touch

- Pop incidents, contact records, sales ops, or reports
- Screen pop on alerting of call
- Pass call context to the RightNow Agent Desktop from IVR, creating and populating new records
- No integrated desktop call control

Simple Screen Pop

HTTP requested screen-pop – Now available

RN Connect

Growing .NET, Java, C++ suite – Now available

RN Connect Integration Framework

Aug '08

MM Toolbar

Nov '08

RTAPI & CTI Toolbar

Complex C/C++ - Now available

CTI, UQ Integration

Open Methods

Field Trials: Fall '08
GA: Feb '09

Advanced Options:

- Call control toolbar on RN Desktop
- More complete integration
- Communications Center
 - Shows linking of calls with incidents, contacts, and opportunities
- Allow attached data to be transferred with call/contact

Deep

1. Simple Screen Pop Interface

Advanced Telephony Integration Options

2. RTAPI
3. RightNow Connect - Custom Integration
4. OpenMethods - CTI Abstraction (partner)

1. Simple Screen Pop Interface

Screen Pop Request

- Potential to support broad array of telephony infrastructures: *Avaya, Cisco, Genesys, Aspect, NorTel, Rockwell, ..., etc.*
- Allows generation of a screen pop: contact, incident, report, more
- HTTP GET function generated, using localhost, on the agent desktop
- Requires 3rd party desktop client or softphone to generate URL
- Requires Discovery to assess customer compatibility & implementation
- Does not require integrated RightNow-client telephony

Pros

- Easy and fast to implement
- Low cost add-on to existing telephony infrastructure
- Potential support for broad-range of telephony vendors

Cons

- Limited functionality – Screen Pop only
- No embedded desktop call control – no outbound
- Fully dependent upon 3rd-party soft-phone / desktop application

Works in conjunction w/ CT-Connect or *(potentially)* existing telephony server

- Best demonstrated support is for Avaya AES-enabled PBX/ACDs
- Requires on-premise CT-Connect server component
- *To be phased-out; provided as a bridge to more strategic offerings*
- *Pros*
 - *Supports all call modes: inbound/outbound/transfers/etc.*
 - *Only current option supporting deep CTI for Nov '07 / on-premise installations*
 - *Only current option for Avaya AE*
- *Cons*
 - *Complex integration required*
 - *Very Limited telephony platform support*
 - *Requires on-site server deployment*
 - *Requires expensive 3rd-party telephony component (CT-Connect)*

3. Custom Integration via RightNow Connect via Multi-media Desktop Integration Framework

global_cmo - RightNow CRM

Home

Login Chat comland (Logged Out) | Request Chat | Cancel Request | Engagement

OmniControl

Active Engagements

Status: Available

Session Controls

Begin Wrap Up | Terminate | Transfer | Conference | Request Help | Dial | Place On Hold

Supervisor | Your Status

Monitor | Logout

Logged in as: comland comland

OmniControl with a MediaBar add-in

- Very generic event / messaging model
- XML schema easily modified to contain any data required
 - *When the XML is changed the SPI and Event layers need to be modified to parse and support the new data*
 - *The UI components or modifications for the new data would need to be created*
- Sample XML for an inbound call event

```
<?xml version="1.0" encoding="utf-8" ?>
<event type="call">
  <ani>1-555-555-1212</ani>
  <dnis>1-800-888-1234</dnis>
  <incidentId>128</incidentId>
</event>
```

3. RightNow Connect Integration Options

Pros

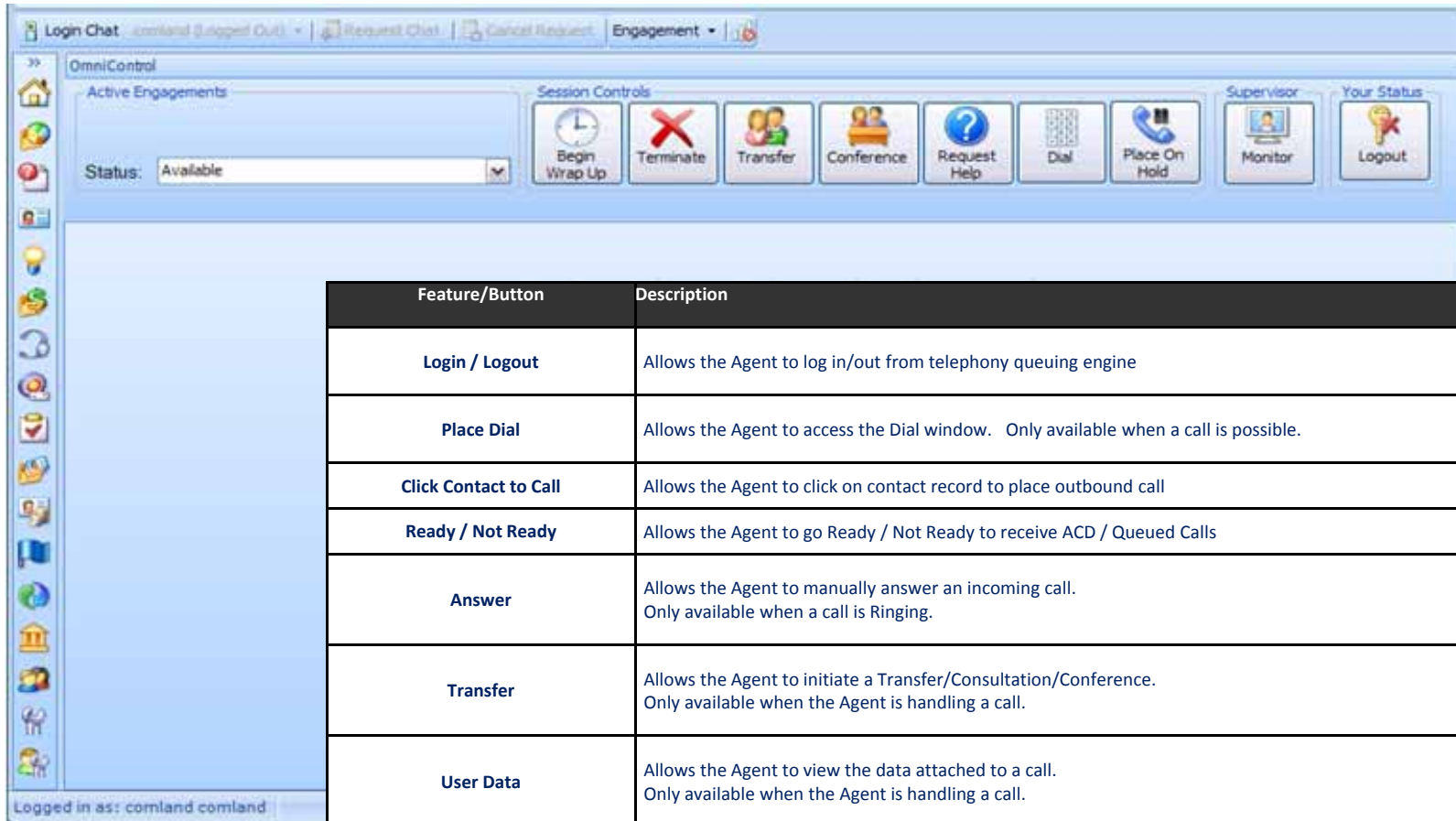
- Extremely Flexible: Can be used from desktop, IVR, or other platform
- Includes .NET, Java, and C++ integration capabilities
- New functionality relatively simple to add
- Growing library of sample applications

Cons

- CTI remains dependent upon 3rd-party components like Genesys, Avaya AES, or on demand partners
- Requires some code to be written: No out-of-the-box functionality

4. OpenMethods CTI Abstraction: Upcoming Features

via Multi-media Desktop Integration Framework & partner



Feature/Button	Description
Login / Logout	Allows the Agent to log in/out from telephony queuing engine
Place Dial	Allows the Agent to access the Dial window. Only available when a call is possible.
Click Contact to Call	Allows the Agent to click on contact record to place outbound call
Ready / Not Ready	Allows the Agent to go Ready / Not Ready to receive ACD / Queued Calls
Answer	Allows the Agent to manually answer an incoming call. Only available when a call is Ringing.
Transfer	Allows the Agent to initiate a Transfer/Consultation/Conference. Only available when the Agent is handling a call.
User Data	Allows the Agent to view the data attached to a call. Only available when the Agent is handling a call.
Hangup	Allows the Agent to hangup a call.
Hold / Retrieve	Allows the Agent to place/retrieve the call on Hold.
Reason Code Support	Support of call work/wrap with reason code designation

4. OpenMethods CTI Abstraction: Early Prototype

Toolbar

Communication Center

Recent Items

Call linked to a Customer Record

Quick Search

Important Messages

Incoming Call "Toast"

The screenshot shows the RightNow Communications Center interface. At the top, there is a toolbar with various call control icons. Below it is the main navigation area with tabs for 'Communication Center' and 'Communications Center Home'. The 'Communication Center' pane on the left contains a 'Recent Items' list with call logs and a 'Quick Search' section with input fields for Name and All Phone Numbers. The 'Communications Center Home' pane on the right shows a 'Calls' table with columns for Line, Contact / Activity, Phone, and Status. A call with Line 1 and Contact 'Incident: Phone handset is not working' is highlighted. Below the calls is a 'Notifications' section with a table showing a message alert for Tim Johnson. At the bottom right, a 'CTI' toast window is visible, displaying 'Type: Incoming Call' and 'ANI: 5221234'. The interface also includes a sidebar with navigation options like Home, Analytics, Incidents, Contacts, Answers, Opportunities, Communication Center, Mailings, and Tasks. The status bar at the bottom indicates the user is logged in as Tim.

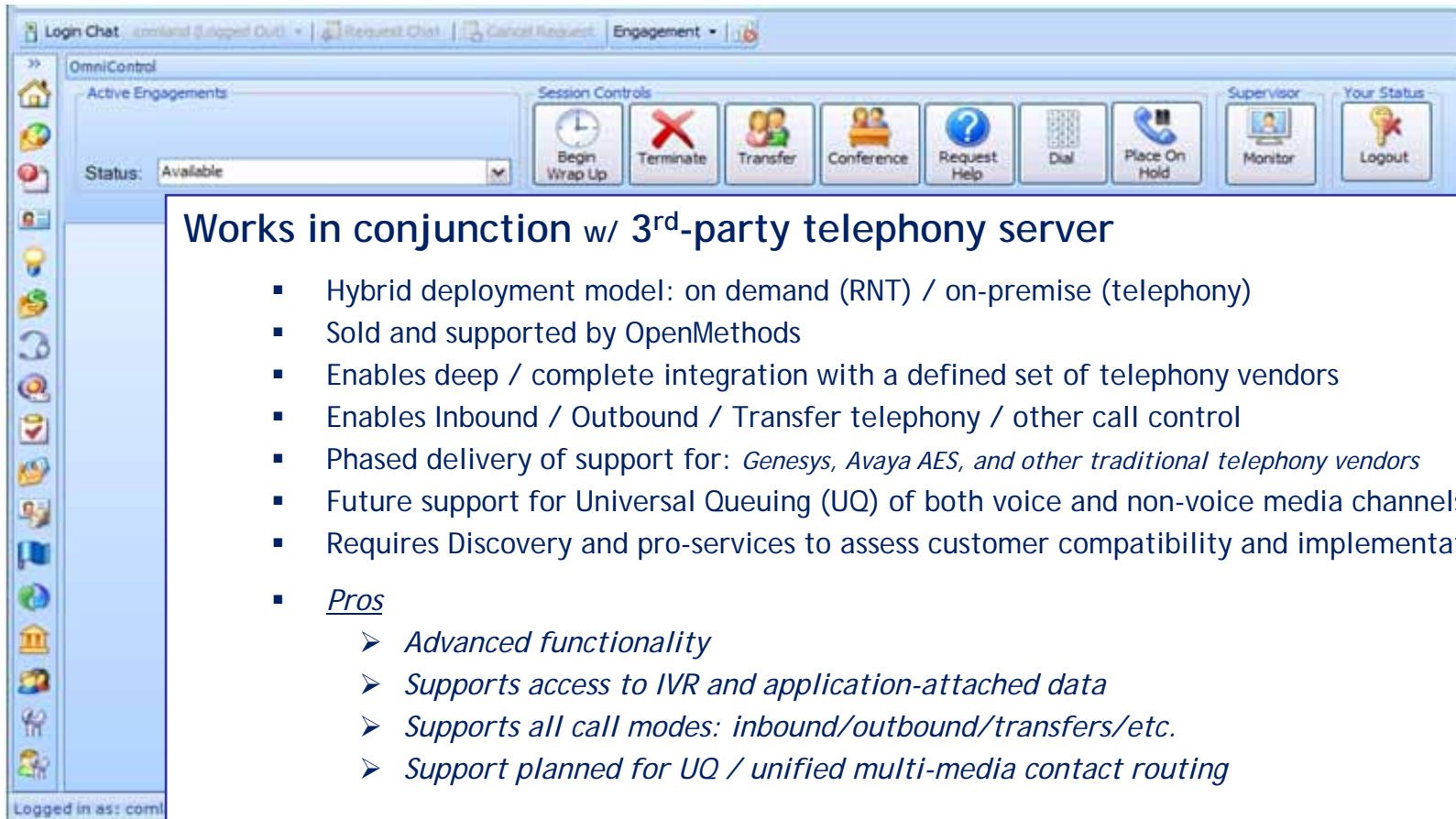
Line	Contact / Activity	Phone	Status
1	Incident: Phone handset is not working	5221234	Active

Who	Type	Message	When
Tim Johnson	Message Alert	Attention: There has been an update to all product pricing - please c...	04/09/2007 10:07 AM

CTI
Type: Incoming Call
ANI: 5221234

4. OpenMethods CTI Abstraction: Upcoming Features

via Multi-media Desktop Integration Framework & partner



Works in conjunction w/ 3rd-party telephony server

- Hybrid deployment model: on demand (RNT) / on-premise (telephony)
- Sold and supported by OpenMethods
- Enables deep / complete integration with a defined set of telephony vendors
- Enables Inbound / Outbound / Transfer telephony / other call control
- Phased delivery of support for: *Genesys, Avaya AES, and other traditional telephony vendors*
- Future support for Universal Queuing (UQ) of both voice and non-voice media channels
- Requires Discovery and pro-services to assess customer compatibility and implementation
- Pros
 - *Advanced functionality*
 - *Supports access to IVR and application-attached data*
 - *Supports all call modes: inbound/outbound/transfers/etc.*
 - *Support planned for UQ / unified multi-media contact routing*
- Limitations
 - *Supports only implemented subset of telephony vendors*
 - *On-site 3rd-party service deployment*
 - *Additional licensing of 3rd-party desktop CTI*

Questions to Consider When Selecting a Telephony Integration Strategy

1. Limited budget?
 - *Simple Screen Pop may be functionally limited, but it requires no additional run-time licensing from RightNow*
2. Requires desktop telephony call control or outbound speed/auto-dialing from agent desktop?
 - *If yes, Simple Screen Pop is disqualified*
3. Requires support for telephony architectures other than Genesys, Avaya, or Cisco?
 - *If yes, then Simple Screen Pop or Custom Integration may be best*
4. Requires attached-data access or true multi-media universal queuing?
 - *If yes, then Partner integrations (e.g. Open Methods) are likely best bets*

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The Contextual Agent Desktop

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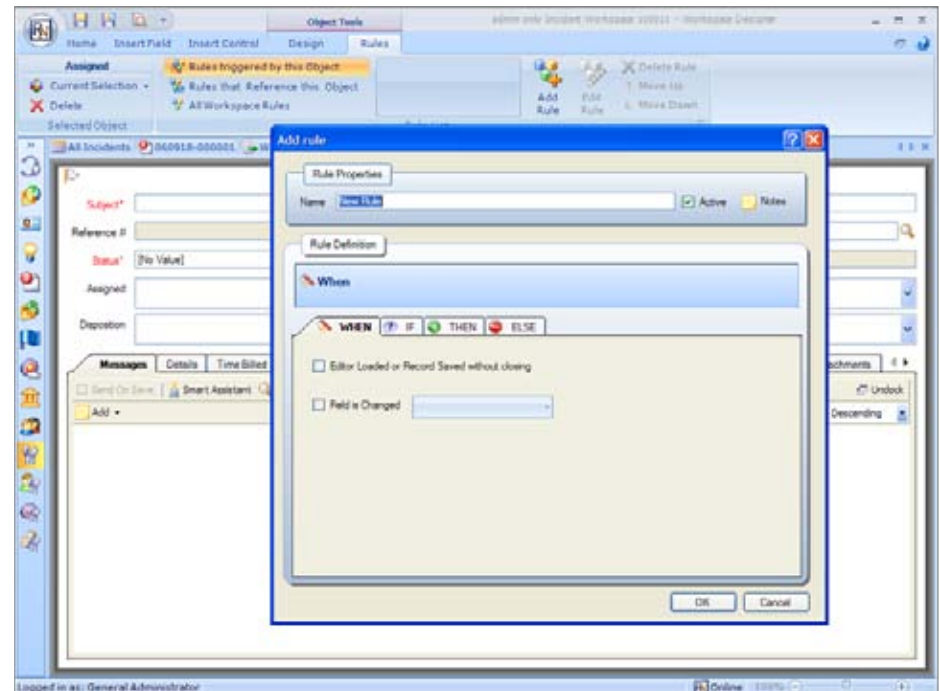
- The contextual desktop delivers only the relevant content specific to the agent, customer, and interaction
- The result is a streamlined desktop that can make your agents significantly more efficient and effective
- RightNow Contextual Desktop components
 - Contextual Workspaces
 - Guided Assistance
 - Agent Scripting

- Agent Desktop On Demand changes dynamically based on the context of the agent task and customer information



- Providing instant access to relevant knowledge at the right time and right place increases agent productivity and enhances the customer experience

- Modify a workspace based on actions taken by an agent or information that is known about a customer
- Rules for modifying controls within ribbon, fields, tabs displayed in workspace based on the context of the interaction
- Control field properties such as visibility, read-only, required, or default value based on other fields or system values such as user profile



- **Examples**

- Contact Center: If the contact profile had a value in the last product purchased custom field, show an order history tab on the agent desktop
- Contact Center: If customer's product is in warranty, show some warranty information fields in the agent workspace
- Contact Center: If agent indicates that this needs to be an RMA, then show the RMA tab dynamically to simplify the agent screens for productivity
- Contact Center: If product falls within a serial # range that has a product alert, show this alert on the agent desktop incident workspace when that product is selected.
- Sales: When rep marks the opportunity as closed, automatically display additional sales booking tab that has fields for capturing booking information.

Contextual Workspaces - RMA Example

060918-000001 - Workspace Designer

Home

Commands: New, Save, Save and Close, Forward, Print, Copy, Delete, Offer Advisor, Propose, Spell Check, Expand, New Opportunity, Info

Incidents: All Incidents, 060918-000001, Workspaces Explorer, bill test service opp, admin only

Incident Items: My Inbox (default), Organizations, Queues, Groups, Today's Incidents, Contacts, All Incidents, Last Name, Customize List...

Recent Items: 060918-000001

Quick Search: Search, Customize List...

Subject*: Problem with cell phone

Reference #: 060918-000001

Status*: Unresolved

Assigned: Automation andy -

Disposition: Customer Complaint (D8), Product Defect (D8.1)

Contact*: Andy Borqman

RMA Type: [No Value]

Product: Mobile Phones (P3), ConnexCamera Phone 7730 (P3.1)

Category: Cellular phones w/video (C4.1.1), Connex phones (C4.1.1.1)

Messages: Details, Time Billed (0), Organization, Contacts, RN Locator, Sales Literature, Tasks (0), Session (0), Atts

Send On Save, Smart Assistant, Search Knowledgebase, Standard Text, Undock

Add, View: All, Sort: Date - Descending

Customer Entry: By Phone

Hello,

There appears to be a defect in my Connex phone. Whenever I type in a number key it starts dialing the last phone number. At this point the phone is unusable. Can I exchange this phone for another one?

Thanks
Andy

Logged in as: General Administrator | Editing 2 objects | Online | 100%

Agent needs to enter additional information if incident results in RMA

Contextual Workspaces - RMA Example

The screenshot displays the 'Workspace Designer' application window for workspace '060918-000001'. The interface includes a 'Home' tab with a 'Commands' bar containing icons for New, Save, Save and Close, Forward, Print, Copy, Delete, Offer Advisor, Propose, Spell Check, Expand, New Opportunity, and Info. On the left, there is a navigation pane with sections for 'Incidents' (listing My Inbox, Organizations, Queues, Groups, Today's Incidents, Contacts, All Incidents, Last Name, and a Customize List... link), 'Recent Items' (showing 060918-000001), and 'Quick Search'. The main workspace area shows an RMA form with the following fields: Subject* (Problem with cell phone), Reference # (060918-000001), Status* (Unresolved), Assigned (Automation andy -), Disposition (Customer Complaint (D8), Product Defect (D8.1)), Contact* (Andy Borqman), RMA Type (Exchange), Product (Mobile Phones (P3), ConnexCamera Phone 7730 (P3.1)), and Category (Cellular phones w/video (C4.1.1), Connex phones (C4.1.1.1)). A red box highlights the 'RMA Type' dropdown menu, and a red arrow points to it from a text box that says 'Agent changes RMA type to Exchange'. Below the form is a 'Messages' section with tabs for Details, Time Billed (0), Organization, Contacts, RN Locator, Sales Literature, Tasks (0), Session (0), and Atts. The message content includes a 'Customer Entry By Phone' header, a 'Hello,' greeting, a complaint about a defect in a Connex phone, and a request to exchange it. The message ends with 'Thanks Andy'. The status bar at the bottom indicates 'Logged in as: General Administrator' and 'Editing 2 objects'.

Agent changes RMA type to Exchange

Contextual Workspaces - RMA Example

060918-000001 - Workspace Designer

Home

New Save Save and Close Forward Print Copy Delete Offer Advisor Propose Spell Check Expand New Opportunity Info

Commands

Incidents

All Incidents 060918-000001 Workspaces Explorer bill test service opp admin only Incident

Incident Items

My Inbox (default) Organizations Queues Groups Today's Incidents Contacts All Incidents Last Name Customize List...

Recent Items

060918-000001

Quick Search

Search

Customize List...

Subject* Problem with cell phone

Reference # 060918-000001

Status* Unresolved

Assigned Automation andy -

Disposition Customer Complaint (D8) Product Defect (D8.1)

Contact* Andy Boroman

RMA Type Exchange

Product Mobile Phones (P3) ConnexCamera Phone 7730 (P3.1)

Category Cellular phones w/video (C4.1.1) Connex phones (C4.1.1.1)

Messages Details **RMA** Time Billed (0) Organization Contacts RN Locator Sales Literature Tasks (0) Session (0)

Returned Material Authorization

RMA#:

Date Issued: Thu Dec 06 03:31:15 PST 2007

Customer Information

Customer #: Purchase Order #: Telephone #:

Contact Name: Wells, Jane Institution:

Will product be returned? Yes No Ship Via: Shipper #:

Catalog/Lot#: Quantity:

Product Name:

Catalog/Lot#: Quantity:

Logged in as: General Administrator Editing 2 objects

Online 100%

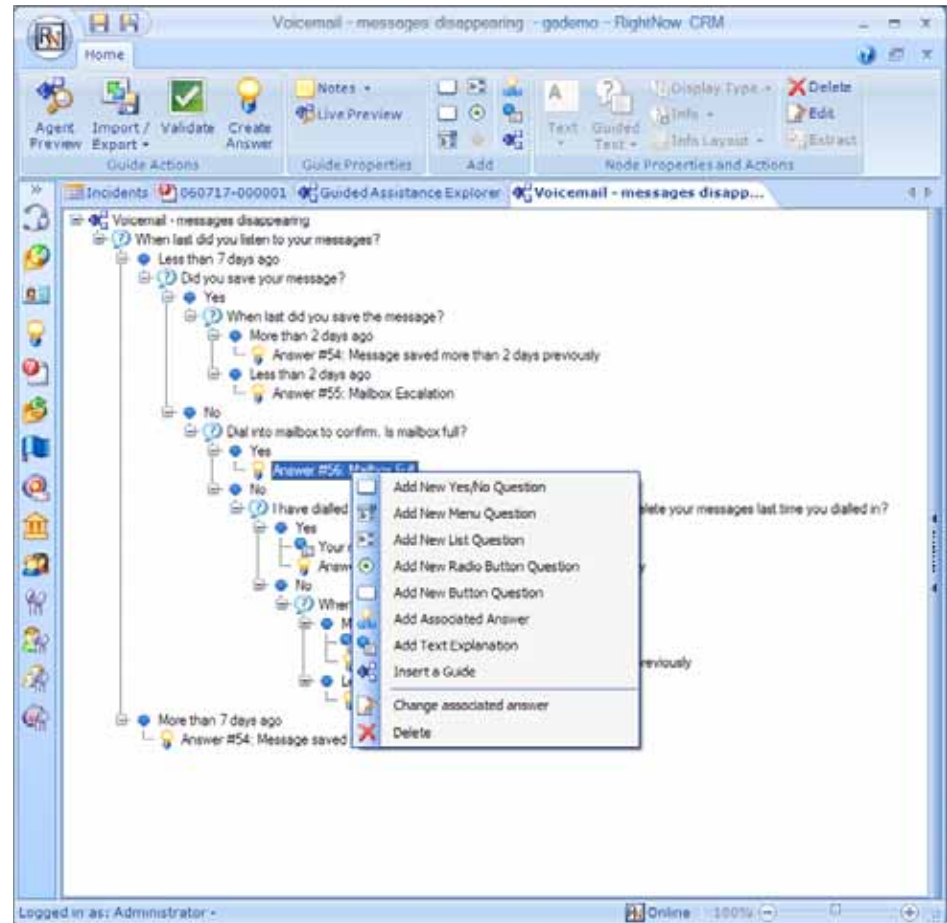
RMA tab is added and displayed

Description:

- Ability to walk an agent through a series of questions to troubleshoot and reach an appropriate answer

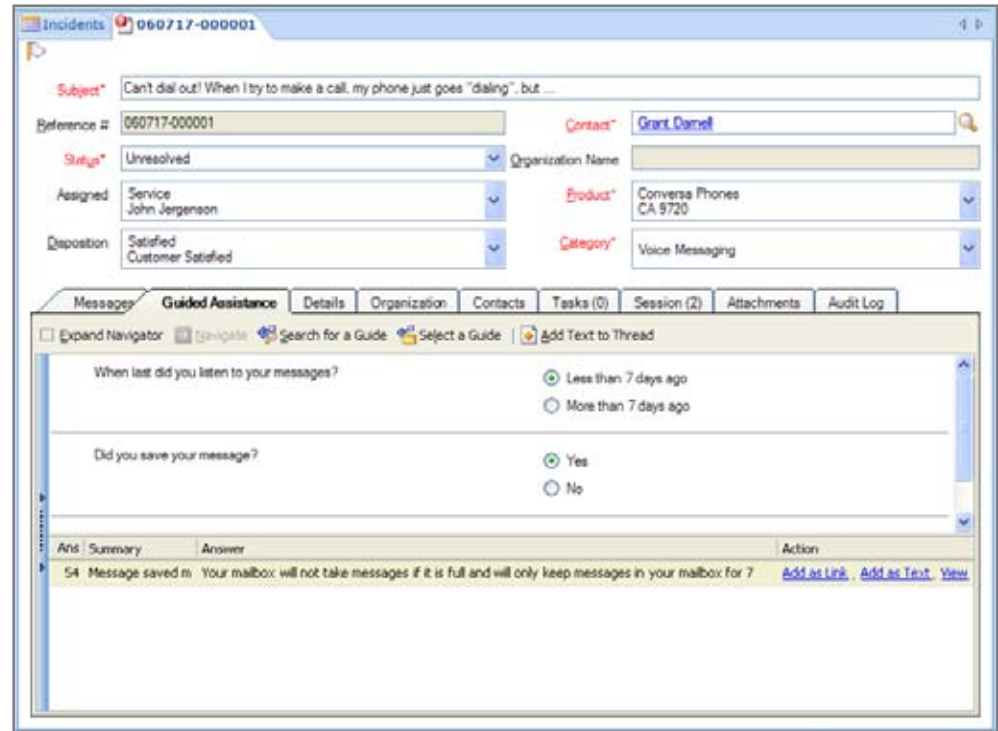
Key Capabilities:

- New designer enables quick creation and editing of decision trees
- Images and HTML can be added to questions
- Trees or branches can be reused and copied into other trees
- Preview mode enables designers to walk through the agent experience
- Answer searches return both answers as well as decision trees
- Customer responses are stored on the incident record for review



Why it Matters:

- Enables consistent handling of complex customer issues regardless of agent experience level
- Model the best practices of your best agents
- Shorten resolution times and improve FCR rates by guiding the agent to the right answer—the first time
- Improves the customer experience by enabling faster resolution, fewer transfers

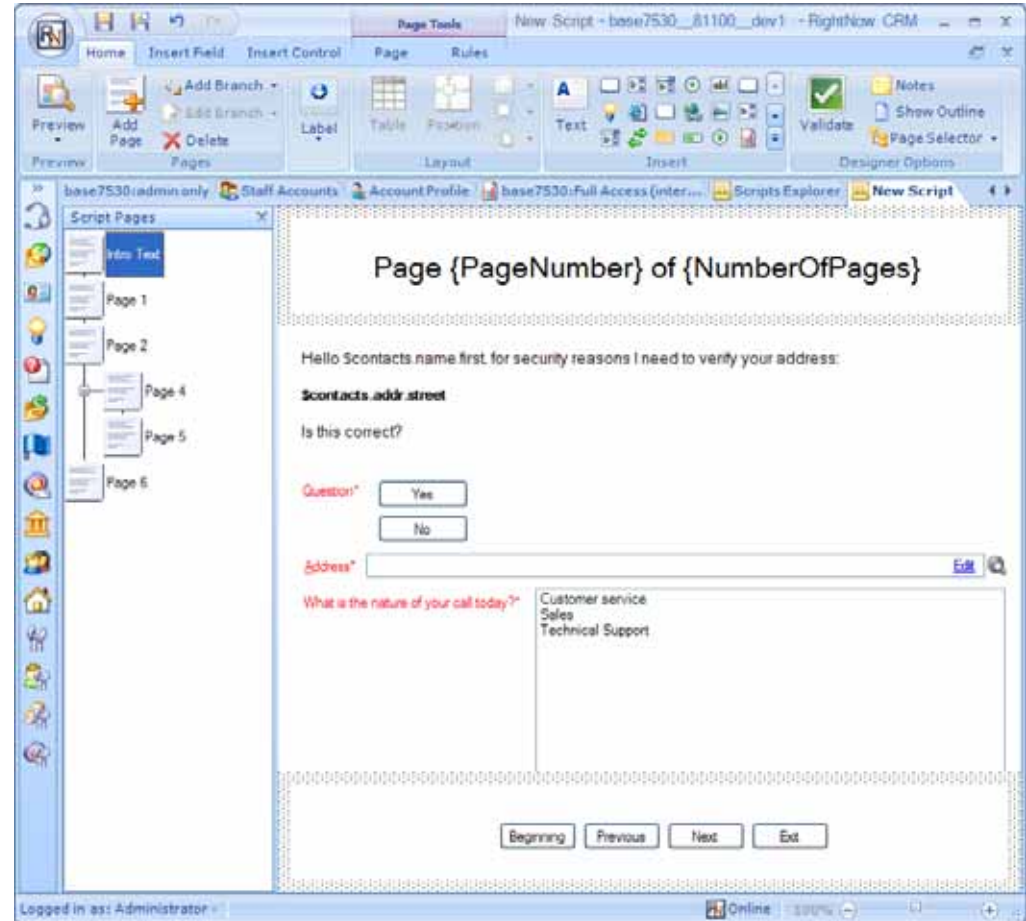


Description:

- Ability to provide agents with call scripts, enabling them to walk through a script with a customer

Key Capabilities:

- New scripting designer enables full design control:
 - Complete script layout control
 - Add tables, images, questions, HTML, headers, footers...
 - Insert merge fields to personalize script text
 - Embed fields, answers, analytics reports, browser controls, navigation buttons
 - Full formatting control
- Complex branching logic
- Contextual workspace rules can be used to customize or launch a script
- Preview mode enables designers to walk through the agent experience



Agent Scripting - Designer

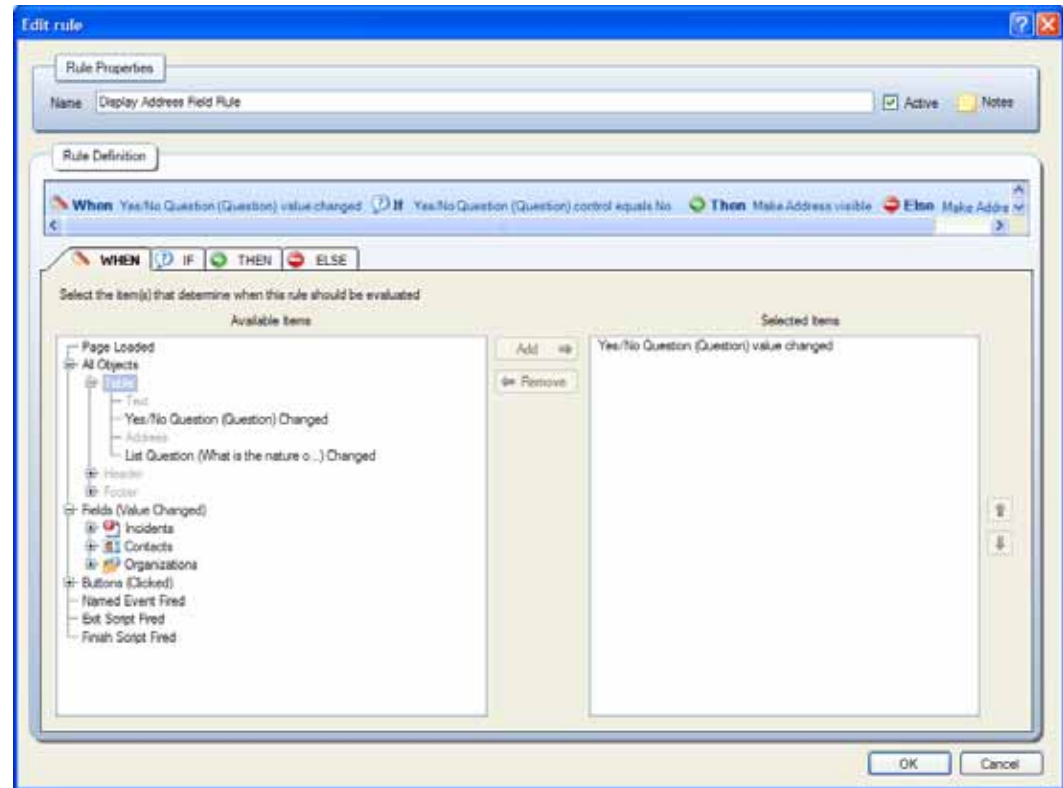
The screenshot shows the 'Agent Scripting - Designer' interface. The main window displays a script page titled 'Page {PageNumber} of {NumberOfPages}'. The page content includes a greeting: 'Hello {contacts.name} first, for security reasons I need to verify your address:'. Below this is a form field for 'Address' with a label 'Address*'. A question is asked: 'Is this correct?' with 'Yes' and 'No' buttons. Below the question is another form field for 'What is the nature of your call today?' with a list of options: 'Customer service', 'Sales', and 'Technical Support'. At the bottom of the page are navigation buttons: 'Beginning', 'Previous', 'Next', and 'Ext'. The left sidebar shows a 'Script Pages' tree with 'Page 1' through 'Page 6'. The top menu includes 'Home', 'Insert Field', 'Insert Control', 'Page', and 'Rules'. The top toolbar contains various icons for adding and editing elements. The status bar at the bottom indicates 'Logged in as: Administrator' and 'Online'.

Annotations:

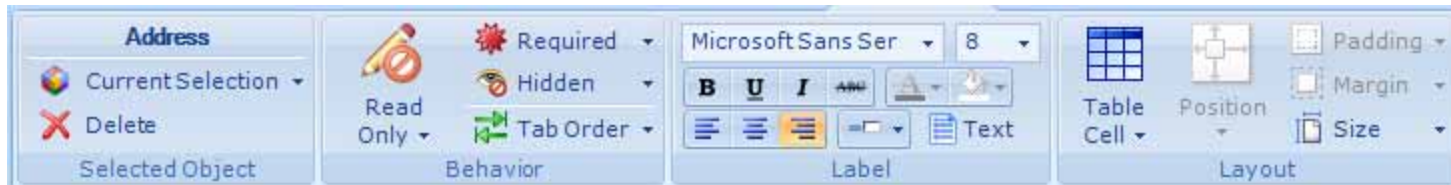
- Add pages and branches with a single click
- Add tables for precise layout control
- Define contextual rules to control the display & behavior of the script
- Add objects: images, HTML, questions, browser controls, reports.....
- Validate script flow to catch errors
- Preview the script during design
- Page progress tells the agent where they are in the script
- Page branching is illustrated for quick reference in the side-bar
- Add merge fields to personalize the script & display data
- Create questions with yes/no, multi-select, list and radio button answers
- Navigation controls take the agent to the next step

Agent Scripting - Contextual Rules & Scripts

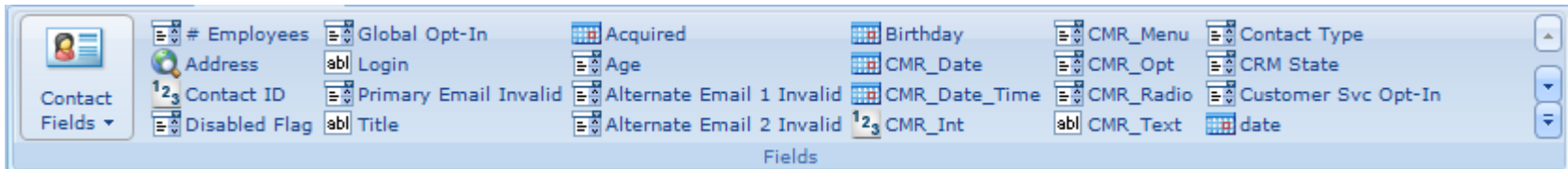
- Contextual rules enable control over the execution of the script
- Control objects based on the customer, the agent, or other events in the script or interaction
- Hide or display any object in the script
- Automate script navigation
- Set field values based on script actions



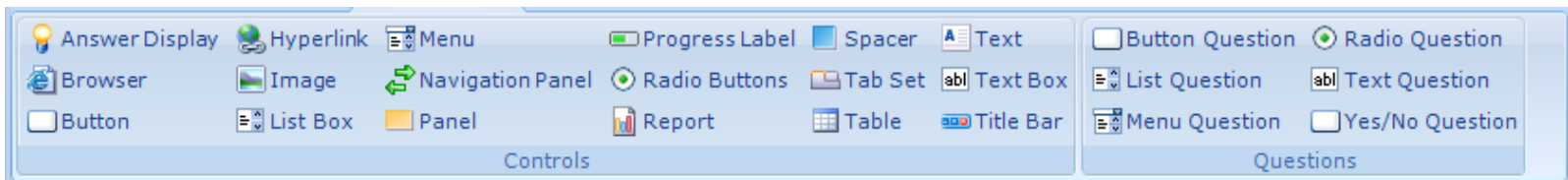
- Complete formatting control of text and objects
 - Tables can be used for precise layout control
 - Set read-only, required and display properties for questions and fields



- Insert fields for data capture and validation



- A wide range of objects, questions, and controls are available to customize the script to the business needs

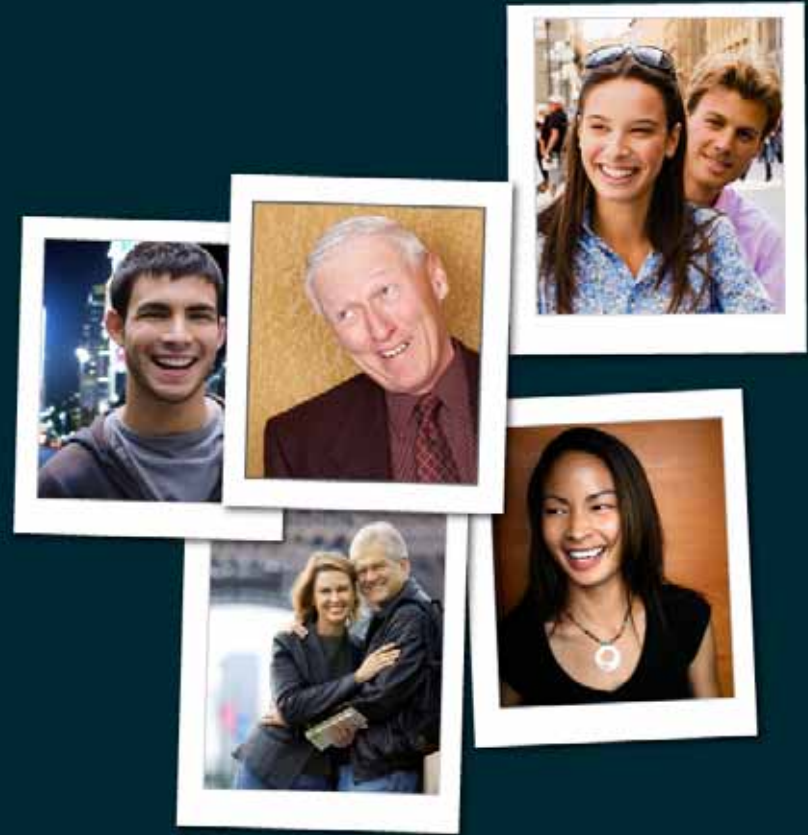


Why it Matters:

- Enables consistent handling of complex customer issues regardless of agent experience level
- Support high volume telesales business cases
- Drives revenue by enabling agents to cross-sell/up-sell customers during the interaction
- Facilitates quicker ramp-up of new agents

- Client Workflow
- Custom Business Objects
- Embedded Predictive Analytics

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The Contextual Agent Desktop: Demo

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Questions?

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