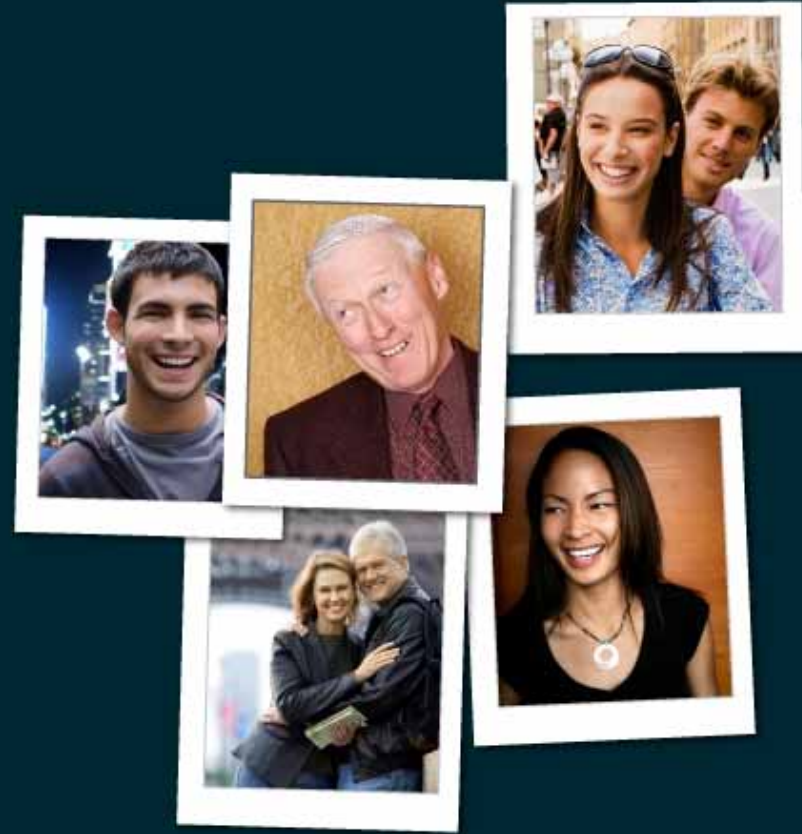


SUMMIT 08

SUPPORTING YOUR VOICE OF THE CUSTOMER INITIATIVES RIGHTNOW FEEDBACK

Keir Barbe, Product Marketing Manager
Jose Cook, CR Web Administrator, Continental Tire



**RIGHT
NOW.**

- Introductions
- Trends/Insights
- Components of a Survey
- Feedback Highlights in '08
- RightNow Case Study: Using Feedback to Facilitate VOC Initiatives
- Customer Case Study: Jose Cook, Continental Tire
- What's Coming

- For every customer complaint you actually receive in the normal course of business, there are between 5 and 10 dissatisfied customers from whom you will never hear—again! Ever. Lost.
- “Excellent” respondents are 6 times more likely to continue doing business compared to “good” responses.
- From a survey of 4,913 people, Forrester determined that 14 percent take more than 6 online surveys a month, with 4 percent taking more than 20. Forrester recommends companies weed out these results - skewing pros by asking respondents how frequently they participate in surveys.
- For their part, most customers are more than happy to have the opportunity to provide feedback. In fact, according to survey results, more than half (53%) of all companies never provide customers with an incentive to take their surveys, other than the opportunity to have their voices heard.

- Questionnaire
 - 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
 - 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.

- Topic Monitoring (Feb '08)

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

- Chat Surveys (May '08)

Surveys can be managed through Chat Rules.

- Send survey on chat completion
- Pop survey on chat completion
- Pop survey when chat request cancelled

- Survey by Proxy (Aug '08)

The ability for an agent to take a survey on behalf of a contact within their RightNow OnDemand Desktop workspace. (Contact - Incident - Opportunity)

- Dynamic Survey Content (Aug '08)

Example: Make the second question or form field on the page change based upon the answer to the first question.

Enables RightNow to communicate directly with our customers regarding the feedback they provide

Corporate Goals

- Exceed customer expectations
- Consistency & visibility across communications
- Proactively take actions based on customer interactions

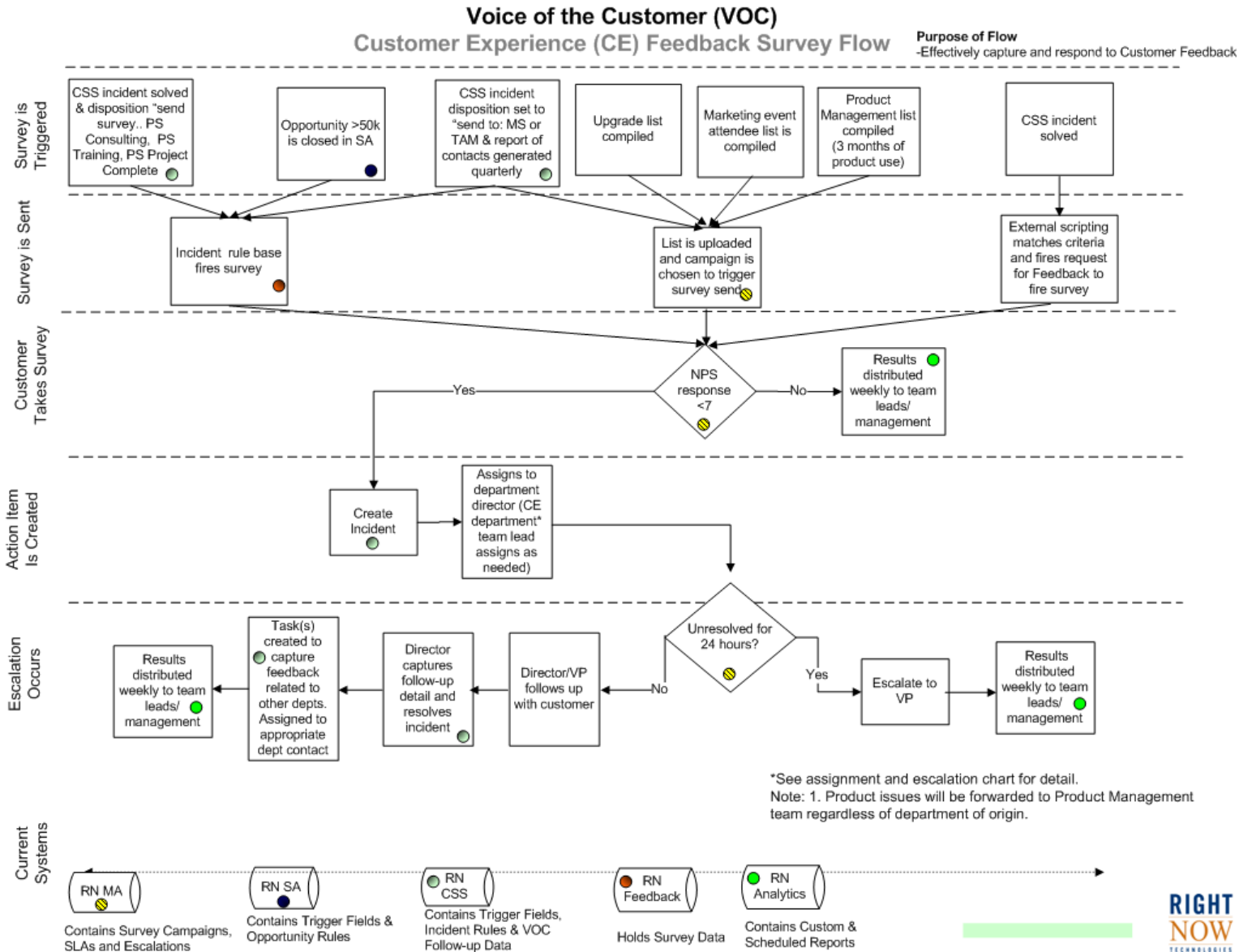
Corporate Direction

- Detractor incidents to go to Sr. Director/VP for follow-up
- Escalations to go to VPs and/or GMs
- Responses to detractors within 3 days
- Quarterly Executive Review

FEEDBACK TOUCHPOINTS

Survey	Owner	Frequency	Detractor Contact
Closed Sale	Field Ops	Following Opportunity close >50k	Regional Sales RVP
PS Project Complete	PS	Implementation or major project as defined by PS Mgt	Pro Services Director
Support	TS	5th, 25th, 50th incident per contact	Technical Support Director
Training	PS	Following Training delivery	Pro Services Director
Consulting	PS	Following Consulting completion	Pro Services Director
TAM	PS	Quarterly	Pro Services Director
Managed Services	PS	Quarterly	Pro Services Director
Upgrade Completion	PS	Following Upgrade completion	Technical Support Director
V8 Product Survey	Prod Mgmt	Monthly (v8 with hands on knowledge)	VP of Products
Renewal/Account Expansion	Field Ops	TBD	Regional Sales RVP
RNT Event	Mkt	Following Forums, User Conferences, etc.	VP of Marketing

PHASE 1-DETRACTOR FOLLOW-UP PROCESS FLOW



- Implemented using standard out of the box product functionality
- Incident automatically created for <7 response to NPS question (detractor)
- Detractor incidents are assigned to Director/VP, escalations to VP/GM
- Feedback is classified (product, people, process)
- Status of actions captured (resolved, etc.)

THE INVITATION MESSAGE

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Proof: Follow Up on Your Consulting Engagement - Message (HTML)

Message Add-Ins

Reply Reply Forward
to All Respond


Delete Move to Folder Create Rule Other Actions Actions

Block Sender Not Junk Junk E-mail

Categorize Follow Up Mark as Unread Options

Find Related Select Find

From: RightNow Feedback [rightnow_feedback@rnmk.com] Sent: Mon 9/8/2008 12:53 PM
To: Barbe, Keir
Cc:
Subject: Proof: Follow Up on Your Consulting Engagement



SHARE YOUR EXPERIENCE

We are dedicated to constantly improving the customer experience. Your comments on our staff, products and services are an important part of that process.

[Resources](#)

[Contact Us](#)


[My Profile](#)

[Complete Survey](#)

Keir,

Please take a moment to [answer these 5 questions](#) about your experience with RightNow's Consulting Services.

Include any comments you would like to share about our staff, process or product:



Thank you for actively participating.

Kind regards,
Mike Brennan
VP, Professional Services
RightNow Technologies Inc.



Communities

Customer Community

Developer Community

Forum

Education & Training

Events

Library

Professional Services

Support

Consulting Feedback Survey

Welcome and thanks for taking a few minutes to describe your Consulting experience.

How satisfied were you overall with your Services experience? (1=not very satisfied, 10=very satisfied")

1 2 3 4 5 6 7 8 9 10

Please rate the RightNow team member/s you worked with during this engagement. (1=not effective, 10=very effective)

1 2 3 4 5 6 7 8 9 10

Rate how well the staff member knew the product. (1=no knowledge, 10=in depth understanding)

1 2 3 4 5 6 7 8 9 10

Please describe aspects of your Services Experience that went well and what you feel we could have improved. Also include specific feedback on staff in this section.

How likely are you to recommend RightNow Technologies to a friend or colleague? (1 = "not very likely," 10 = "very likely")

1 2 3 4 5 6 7 8 9 10

TAKING ACTION ON SURVEY RESPONSES

The screenshot displays the RightNow CRM Survey Designer interface. The main window is titled "PS - Consulting fbs - RightNow Customer Service - RightNow CRM". The interface includes a menu bar (Home, DesignerHome, Insert, View), a toolbar with icons for Save, Save & Close, New, Preview Survey, Survey URL, Info, Spelling, and Proofing, and a sidebar with navigation options like Surveys Explorer, Recent Items, and Quick Search.

The central workspace shows a flowchart for handling survey responses. The flow starts with a "Submit" button leading to a decision diamond labeled "Detractor...". From the "Yes" path, the flow goes to a "PS Cons..." box. From the "No" path, the flow goes to a "Detracto..." box labeled "Standard". A "Standard" connector then leads from the "Detracto..." box to the "PS Cons..." box.

The right sidebar contains a "Survey Components" panel with the following sections:

- Event Triggered Elements
 - Survey Page
 - Serve Webpage
- Conditional Elements
 - Decision
- Standard Elements
 - Notification
 - Redirect to URL
 - Incident
 - Opportunity
 - Lead
 - Add to List
 - Set Field
 - External Event
 - Transactional Mailing
 - Transactional Survey
- Artifacts
 - Comment
- Connectors
 - Submit Connector
 - Standard Connector
 - Artifact Connector

The bottom status bar shows "Logged in as: Keir Barbe" and "Online 100%".

TAKING ACTION ON SURVEY RESPONSES

Incident ? ✕

Label

Properties Notes

Subject*

Status*

Assigned

Product

Category

Disposition

Queue

Service Mailbox

Custom Fields [Set Custom Field](#)

Field	Value	Actions
Customer Severity	4 - No Business I...	Edit , Delete
Interface Name	rightnow.custhel...	Edit , Delete

Customer Entry*

We value your feedback. This incident was generated in response to the feedback you provided on the Consulting feedback survey and will allow our management team to track the review of your feedback.

Please do not respond to this incident.

Sincerely,
RightNow Technologies

TAKING ACTION ON SURVEY RESPONSES

The screenshot displays the RightNow CRM interface for incident management. The window title is "080716-000267 - RightNow Customer Service - RightNow CRM". The interface includes a top menu bar with "Home" and a "Commands" section with icons for New, Save, Save & Close, Copy, Print, Delete, Offer Advisor, Forward, Propose, Spell Check, and Info.

The main workspace is divided into several sections:

- Incidents Panel (Left):** Contains "Incident Items", "Recent Items", and "Quick Search". The "Quick Search" section has a "Contact Quick Search" dropdown and input fields for "Last Name" (filled with "Birchmore"), "First Name", and "Email". A "Search" button and "Customize List..." link are also present.
- Navigation (Bottom Left):** A vertical menu with icons and labels for "Communication Center", "Analytics", "Incidents" (highlighted), "Opportunities", "Campaigns", "Surveys", "Content Library", and "Audiences".
- Incident Details (Center):** A form for incident "080716-000267" with the following fields:
 - Reference #: 080716-000267
 - Contact*: [Steve Birchmore](#)
 - Organization: [RightNow Technologies](#)
 - Customer Severity: 4 - No Business Impact
 - Internal Severity*: 4 : No Business Impact
 - Interface Name*: [rightnow.custhelp.com](#)
 - Status*: Solved
 - Assigned: Prof. Services, Mike Zinne
 - Product*: NPS - Detractor feedback
 - Category: (empty)
- Summary View (Right):** A tabbed view showing the "Summary" of the incident. The subject is "Customer Experience Feedback Tracking-Managed Services". It includes a "Send On Save" checkbox, "SmartAssistant" and "Search Knowledgebase" buttons, and a "Standard Text" dropdown. The text content reads:

Customer Steve Birchmore, 07/16/2008 09:26 AM

We value your feedback. This incident was generated in response to the feedback you provided on the Managed Services feedback survey and will allow our management team to track the review of your feedback.

Please do not respond to this incident.

Sincerely,
RightNow Technologies

The bottom status bar shows "Logged in as: Keir Barbe" and "Editing 3 objects". The system tray includes "Online", "100%", and navigation icons.

TAKING ACTION ON SURVEY RESPONSES

080716-000267 - RightNow Customer Service - RightNow CRM

Home

New Save Save & Close Copy Print Delete Offer Advisor Forward Propose Spell Check Info

Commands

Incidents << Surveys Explorer 080716-000267 >>

Incident Items >> <<
Recent Items >> <<
Quick Search >> <<

Contact Quick Search >> <<

Last Name
Birchmore

First Name

Email

Search

Customize List...

Communication Center
Analytics
Incidents
Opportunities
Campaigns
Surveys
Content Library
Audiences

Reference #
080716-000267

Contact*
[Steve Birchmore](#)

Organization
[RightNow Technologies](#)

Customer Severity
4 - No Business Impact

Internal Severity*
4 : No Business Impact

Interface Name*
rightnow.custhelp.com

Status*
Solved

Assigned
Prof. Services
Mike Zinne

Product*
NPS - Detractor feedback

Category

Summary **VOC/NPS** Details Time Billed Organization Contacts CSI HMS

Type of Issue Product

Resolution Follow Up With Customer

Target Account [No Value]

Date Created 07/16/2008 09:26 AM

Survey History

New Open Copy Print Forward Assign Delete Options

Completed	NPS	Type	Name	Action
12/03/2007 06:54 AM	0	Broadcas	Q4 2007 P5 Passion Award	View
09/09/2007 01:49 PM	0	Broadcas	Q3 P5 Passion Nominees	View
08/30/2007 10:30 AM	0	Broadcas	Q3PassionNomination	View
06/28/2007 07:02 AM	0	Broadcas	Q2P5PassionAward	View
06/21/2007 01:24 AM	0	Broadcas	P5 Passion Q2	View

Tasks Associated with this Incident

Add Open Copy Delete Print Forward Complete Options

Name	Date Due	Date Completed	Assigned	Priority	Action
Product Issue			Keir Barbe		Open , Delete , Print , Complete

Logged in as: Keir Barbe | Editing 4 objects (1 modified) | Online 100%

- Reviewing Results
- Scheduled Report Distribution
- Department Level Review
- Executive Level Review
- Detractor Management

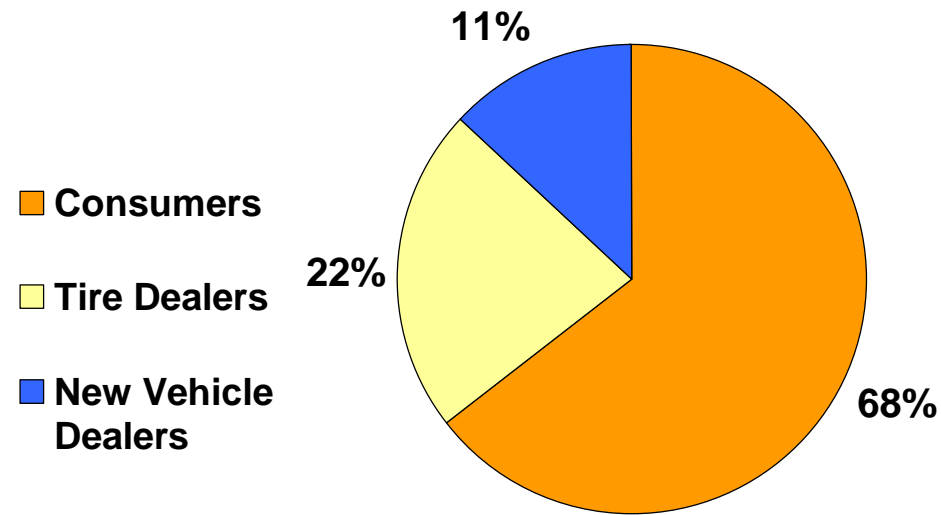
Jose Cook, CR Web Administrator



- Continental AG founded in 1871 in Hanover, Germany.
- Continental Tire North America, Inc. (CTNA), based in Charlotte, North Carolina, is a group company of the Germany-based Continental Corporation.
- Continental has nearly 150,000 employees working in 100 manufacturing facilities, research centers, and test tracks.



- Contact Center- 11 Customer Relations Representative, and support staff handling phone calls & email for the U.S.
- Product Service Engineers - 4 Engineers providing training & support for the sales team, and business partners.
- Service Center - 9 tire inspectors, and office support staff handling warranty claims, processing dealer credits.



- 2002 Began using RightNow
- 2005 Added RightNow Metrics 4.4.1
- 2007 Upgraded to RightNow 8 migrated from Metrics to Feedback
- 2008 Currently using Nov. '07, testing August '08

Needed to replace postage paid comment cards mailed 2 weeks after the close of a customers file.

Why change survey process?

- Inefficient
- Lag between contact and survey results
- Coaching ineffective due to delay
- Low 10% response rate

We needed to rate the quality and effectiveness of Customer Relations, while gathering some product performance information.

Service:

- Customer Feedback regarding phone & email interactions.
- Providing quick efficient follow-up to unresolved complaints.

Product Quality:

- Feedback regarding product quality & performance
- Provide early warning of product issues.

- Launched Survey May 2005
- 15% Response Rate
- Most notable result:

Only 29% of customers would recommend us.

90% of customers liked how they were treated by our staff.



Please answer the following questions:

1. Why did you contact us?

- Warranty
- Technical support
- Product Information
- Dealer location
- Other :

2. How did you contact us?

- Phone
- E- Mail

3. How quickly did we answer your questions?

- Within 1 business day
- Within 2-3 business days
- More than 3 days

MOVING FROM METRICS TO FEEDBACK

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- Launched feedback in January '08
- 21% Response Rate
- Most notable result:

We could track the effectiveness of the survey delivery

Found the Feedback easier to manage than RightNow Metrics 4.4.1



1. Why did you contact us?

- Warranty
- Technical support
- Product Information
- Dealer location
- Marketing Promotion

2. How quickly did we answer your questions?

- Within 1 business day
- Within 2-3 business days
- More than 3 days

3. Please rate our Customer Service Representative in the following categories using a scale from 1-10. (10 being the best, 1 being the worst).

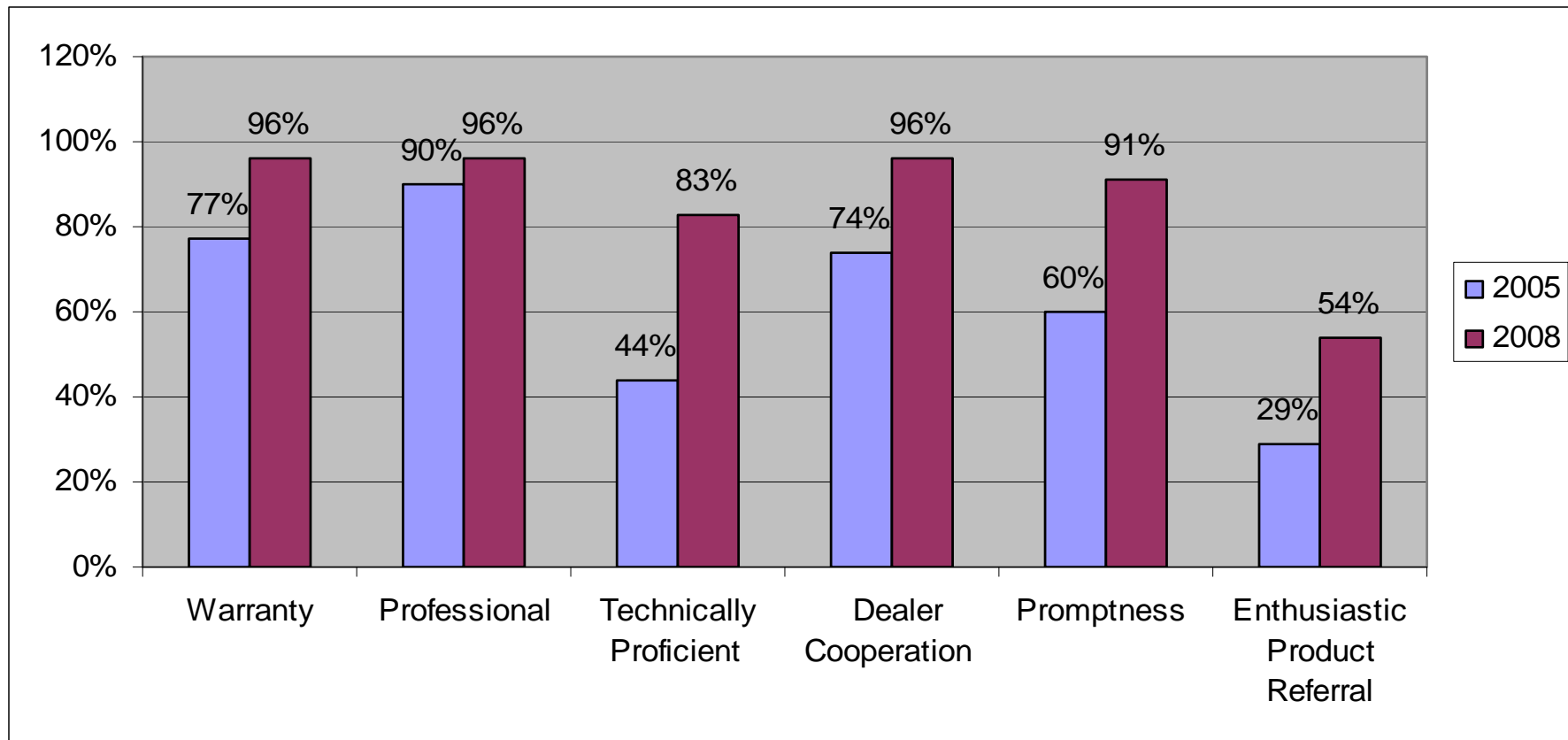
Reliable

Understanding

Professional

TRACKING RESULTS

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Will you or, anyone from your company
 Yes No

Gold Dealer Account#: 850456

Company: CTNA

Submit

Continental Gold Program Retail Program Head



1. "Continental and General brand products meet the market coverage demands of my customers."

Strongly Agree Somewhat Agree Neither Agree or Disagree Somewhat Disagree Disagree Strongly

Comments

Next



- **Incident Merge Fields (Nov '08)**

Ability to include incident merge fields in survey invitation messages for greater personalization

- **Resume Survey (Nov '08)**

Allows users to resume survey from where they left off without having to complete questions they have already answered.

- **Survey Expiration Management (Nov '08)**

The ability to set a date when the survey ends and to create text that is displayed to the consumer when this survey is no longer available

- **Customizable Audience Contact List Display (Nov '08)**

Use RightNow Analytics to create a contact report that will display as the contact list within Audiences. Admins have complete control of columns shown in contact list.

- **Matrix Question Type (Feb '09)**

New question type available when creating a new question

SUMMIT 08

THANK YOU!



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- <http://individual.utoronto.ca/markfederman/VoiceoftheCustomer.pdf>
- http://www.rightnow.com/briefcase-files/PDFs/Customer_Experience_Management_Accelerating_Business_Performance_Part_2_of_2.pdf
- <http://www.retailcustomerexperience.com/article.php?id=442>