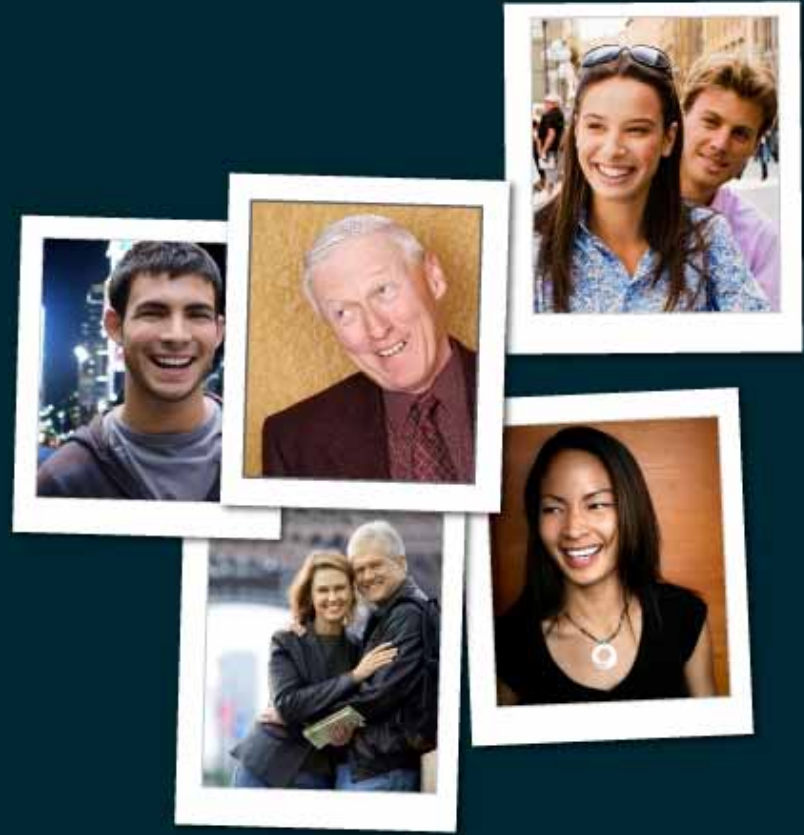


SUMMIT 08



RIGHTNOW 2008 YEAR IN REVIEW

Stephen Bell, Product Marketing Manager

**RIGHT**  
**NOW.**

- February '08
- May '08
- August '08
- November '08 - Preview

February '08

Right  
Information,  
Right Time



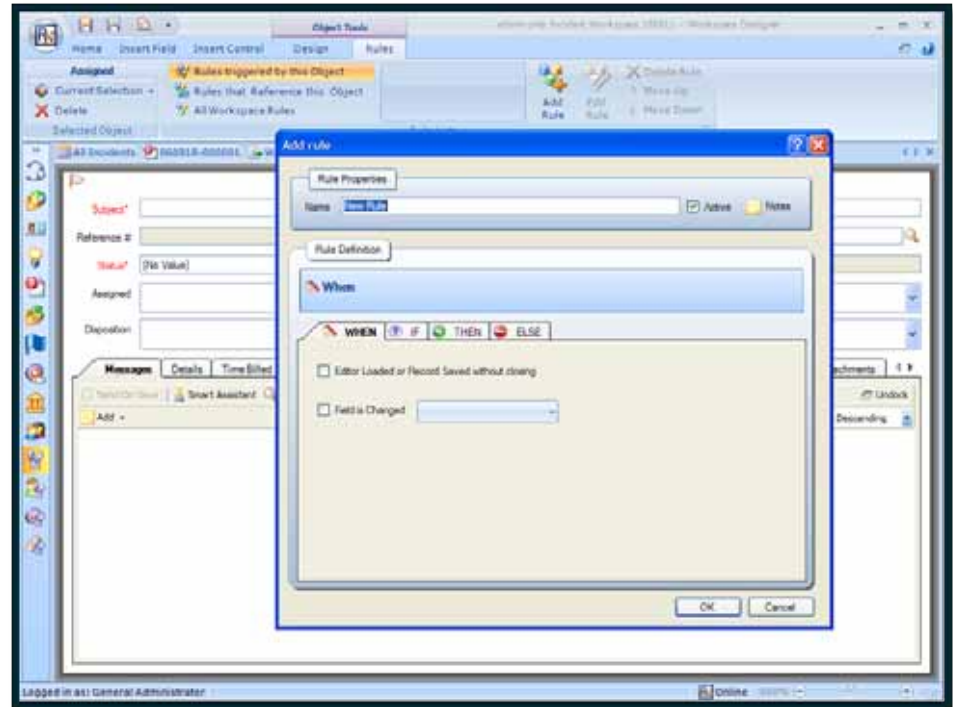
- Contextual Workspaces
- Topic Monitoring
- Agent Desktop Office Fluent™ user interface
- Import/Export Reports and Workspaces
- RightNow Chat Estimated Wait Time

- 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



- **The Challenge**
  - Most valuable customer feedback is many times embedded within unstructured text responses
  - It is difficult and time-consuming to sift through, organize, and act quickly upon this information
- **The Answer**
  - Automatic clustering of common topics based upon text response contents
  - Sample snippets of comments within each cluster to easily understand “average” responses.
- **Example**
  - A new product is launched. A feedback survey is sent out automatically to each customer that registers the product on the web. The theme “defective” is automatically identified as having over 1000 responses so this information can be routed to product management for immediate follow-up.

- **Benefits**

- Quickly understand and act upon what consumers are saying in their natural tone
- Gain insight into consumers' opinions
- Shorter surveys that provide meaningful data
- Reduce operational and research costs
- Service and product improvements based on feedback
- Enhance the customer experience by actually listening to the “voice of the customer”

## Text Response Clustering

Theme Name	Responses	Average SmartSense	Theme Definition
Electronics	5		<a href="#">Details</a>
Kitchen	1		<a href="#">Details</a>
Furniture	1		<a href="#">Details</a>
Appliance	1		<a href="#">Details</a>
Clothes	1		<a href="#">Details</a>

[Top Level](#) > Electronics

## Text Response Clustering

Theme Name	Responses	Average SmartSense	Theme Definition
Portable Devices	3		<a href="#">Details</a>
No Value	1		<a href="#">Details</a>
Sound	1		<a href="#">Details</a>

[Top Level](#) > Electronics

## Response Classification

Text Answer Value	Response SmartSense	Top Level Theme	Level 2 Theme	Level 3 Theme	Response Date
I am loving my home theatre system		Electronics	No Value	No Value	10/31/2007 05:19 PM
I am unhappy with the warranty on my new television		Electronics	Sound	No Value	10/31/2007 05:24 PM
I would like a new phone		Electronics	Portable Devices	No Value	10/31/2007 05:23 PM
What is the per-minute charge once I have gone over my minutes?		Electronics	Portable Devices	laptop	10/31/2007 05:30 PM
How much RAM does the new xjz model have?		Electronics	Portable Devices	smart phone	10/31/2007 05:30 PM

# ON DEMAND DESKTOP UI UPDATE MICROSOFT® OFFICE FLUENT™ USER INTERFACE

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The screenshot displays the 'Incident Report' application window. At the top, a ribbon menu is visible with tabs for 'Home', 'Display', 'Data', and 'Charts'. The ribbon contains various icons for common tasks such as 'New', 'Open', 'Copy', 'Delete', 'Print', 'Forward', 'Assign', 'Propose', 'Search', 'Refresh', 'Reset', 'Save', 'Edit Selection', 'Edit Options', 'Auto Save', 'Export', 'Sort', 'Rollups', 'Auto Filter', 'Default Settings', and 'Slice'. A red box highlights the ribbon area, and a red arrow points to it with the text 'Always Resident Ribbon'. Below the ribbon, a table of incident reports is shown. The table has columns for 'Ref #', 'Full Name', 'Subject', 'Sel', 'Dev Pr?', 'Dev Due Dat', 'Dev Status', and 'Updated'. The table contains 25 rows of data. A red arrow points to the table with the text 'Common Tasks Always Available'. The bottom of the window shows the status bar with 'Logging In As: Jared Bratsky | 25 Records |' and a system tray with a 100% zoom level.

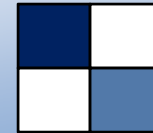
Ref #	Full Name	Subject	Sel	Dev Pr?	Dev Due Dat	Dev Status	Updated
1	070815-000035	Zhengyan Windows Build: Incident Rules page displays "Page Not Found"	0	N	No Value	Not Started	08/22/2
2	070816-000045	Brian Weis Linux Build: NullReferenceException on the installer	0	N	No Value	Not Started	08/22/2
3	070427-000010	John Sully Unable to reinstall RightNow 8.1 on Vista workstation	1	N	No Value	Not Started	06/27/2
4	070814-000014	John Sully Feature Test MSI Installer: Unable to login to a second site using clic	1	N	No Value	Not Started	08/20/2
5	070817-000015	Vinay Yad 8.3 Branch does not seem to contain the newest OI code	1	N	No Value	Not Started	08/20/2
6	070820-000033	Brian Weis Multi edit incidents not saving edits	1	N	No Value	Not Started	08/21/2
7	070710-000019	Ryan Orr Remove Form Finalizer Code	2	1	No Value	Not Started	08/08/2
8	070821-000060	Brian Weis Nothing happens when you click New Opportunity in incident editor	2	1	No Value	Not Started	08/22/2
9	061221-000020	Bob Wall Core - Miscellaneous - Inflate cleanup error stream error	2	3	No Value	Not Started	08/15/2
10	070214-000014	Vinay Yad Unable to install on german version of windows xp	2	N	11/15/2007	Not Started	08/20/2
11	070330-000039	Vinay Yad Support Client HandShaking	2	N	11/15/2007	Not Started	04/13/2
12	070330-000041	Vinay Yad Incident RefNo Detection and Link to RightNow CRM Incident Edit in	2	N	No Value	Not Started	04/16/2
13	070405-000009	Vinay Yad Enhancement - Outlook integration in Incident response, forward, m	2	N	No Value	Not Started	04/17/2
14	070503-000009	Vinay Yad Outlook Navigation: "Outlook Items" Navigation Section does not ha	2	N	No Value	Not Started	08/20/2
15	070529-000051	Ryan Orr Content Library: panel docking isn't properly rendered from remem	2	N	No Value	Not Started	08/10/2
16	070620-000015	Duane Ra Views/Analytics: SQL Server support	2	N	07/30/2007	In Progress	08/20/2
17	070621-000020	Richard Wi Agedatabase: ac_audit_log purge should always keep the last run ti	2	N	No Value	Not Started	08/20/2
18	070621-000022	Richard Wi Dbaudit: update grid reports to allow inline editing	2	N	No Value	Not Started	08/20/2
19	070706-000016	Willie Eide FEATURE TEST: Error Logs created when creating/editing Incidents/	2	N	No Value	Not Started	08/20/2
20	070801-000006	Vinay Yad Completed Tasks in RightNow should not be sync'ed to Outlook duri	2	N	No Value	Not Started	08/20/2
21	070802-000020	Ryan Orr Contact.OrgId is read only for Edit	2	N	No Value	Not Started	08/20/2
22	070808-000047	Vinay Yad Email addresses for Sync'ed contacts do not sync correctly in some c	2	N	No Value	Not Started	08/20/2
23	070808-000048	Willie Eide ac_id 15 "Keyword Search" loading by default in all the answer work	2	N	No Value	Not Started	08/21/2
24	070809-000050	Vinay Yad Fix php vs. php.exe problems in Outlook Integration	2	N	No Value	Not Started	08/20/2
25	070816-000007	Brian Weis Saving a copied Oppty w/ a quote creates a fatal error.	2	N	No Value	Not Started	08/21/2

**Always Resident Ribbon**

**Common Tasks  
Always Available**

May '08

## Voice of the Customer



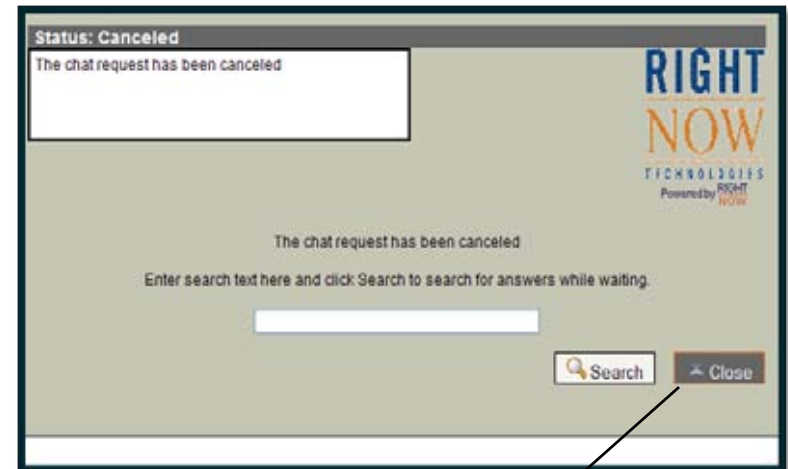
- Feedback for chat
- Emotion-driven workflow
- Customer Portal BETA
- Multi-select workspace field properties
- Expanded admin reports
- Expanded platform support
  - .NET 3.5 framework
- NIST certification (gov)

## Description

- Tightly-integrated surveys within the RightNow Live chat application

## Key Capabilities

- Control offer frequency (daily, monthly, etc.)
- Control offer delivery based on survey response
- Offer opt-in surveys after chat interaction for registered or anonymous consumers
- Offer time-delayed surveys when contact's address is captured in chat session
- Pre-packaged feedback analytics
  - Surveys offered vs. responded to
  - Contact history of survey responses
  - Survey results analysis and trending



- SmartSense emotion score of a free text survey question can immediately and automatically trigger an action to take place.

**Add Condition** [?] [X]

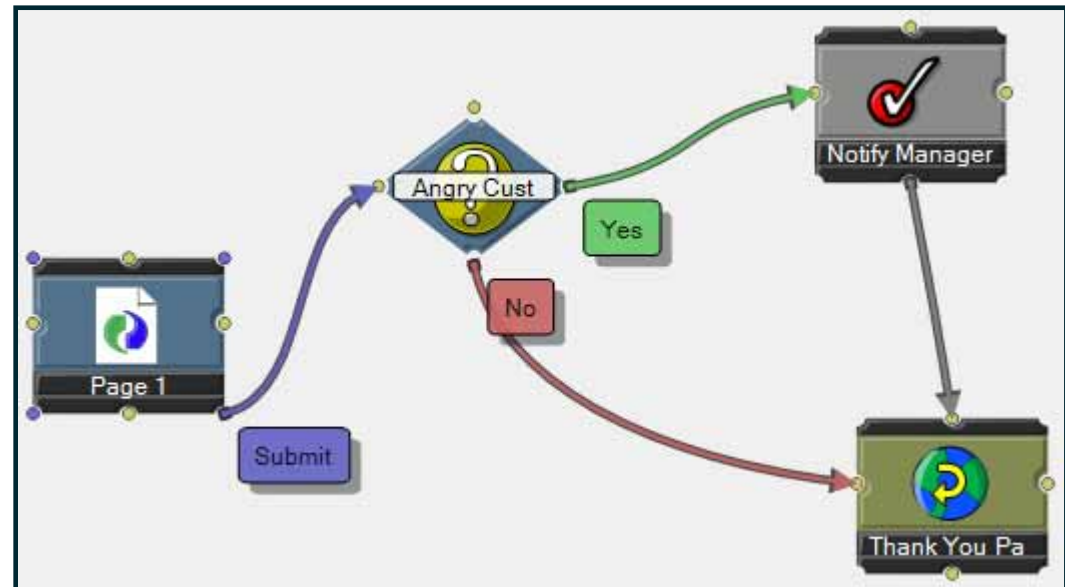
Name

Source\*  
Service Comments SmartSense

Operator\*  
=

Value\*  
Very Angry  
Angry  
Somewhat Angry  
Neutral  
Somewhat Happy  
Happy  
Very Happy

OK Cancel



## Products, Categories, Dispositions:

- Understand how products, categories and dispositions are used
- Use Report Designer to quickly create a list of dispositions, products, or categories
- Understand relationships to other objects such as incidents

## Profile and Nav Set management:

- Understand who has access to which navigation sets
- Understand which workspaces and/or reports are used in which navigation sets

## Why it Matters:

- Improved insight and maintenance/management for administrators
- Improved admin productivity

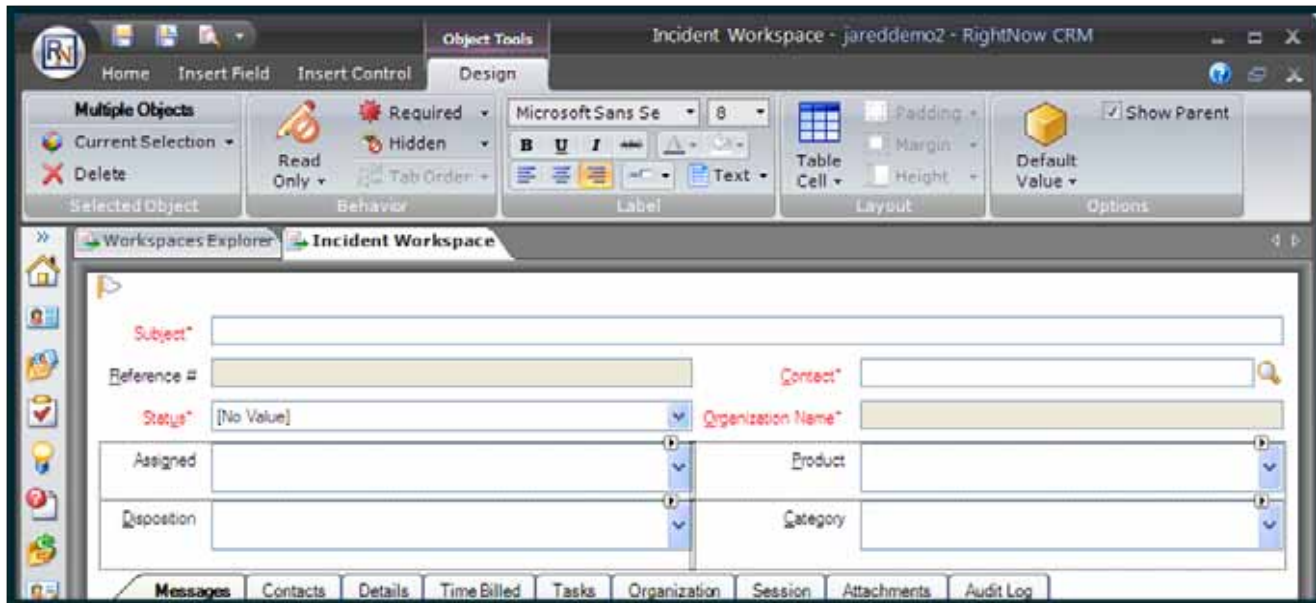
# WORKSPACE ENHANCEMENT: MULTI-SELECT CONTROLS

## Description:

- Ability to set properties for multiple fields all at once including required status, font, size, column span, accessibility, spell check, etc.

## Why it Matters:

- Improve admin efficiencies when creating or modifying workspaces



August '08

## Branding Your Online Customer Experience in a Web 2.0 World

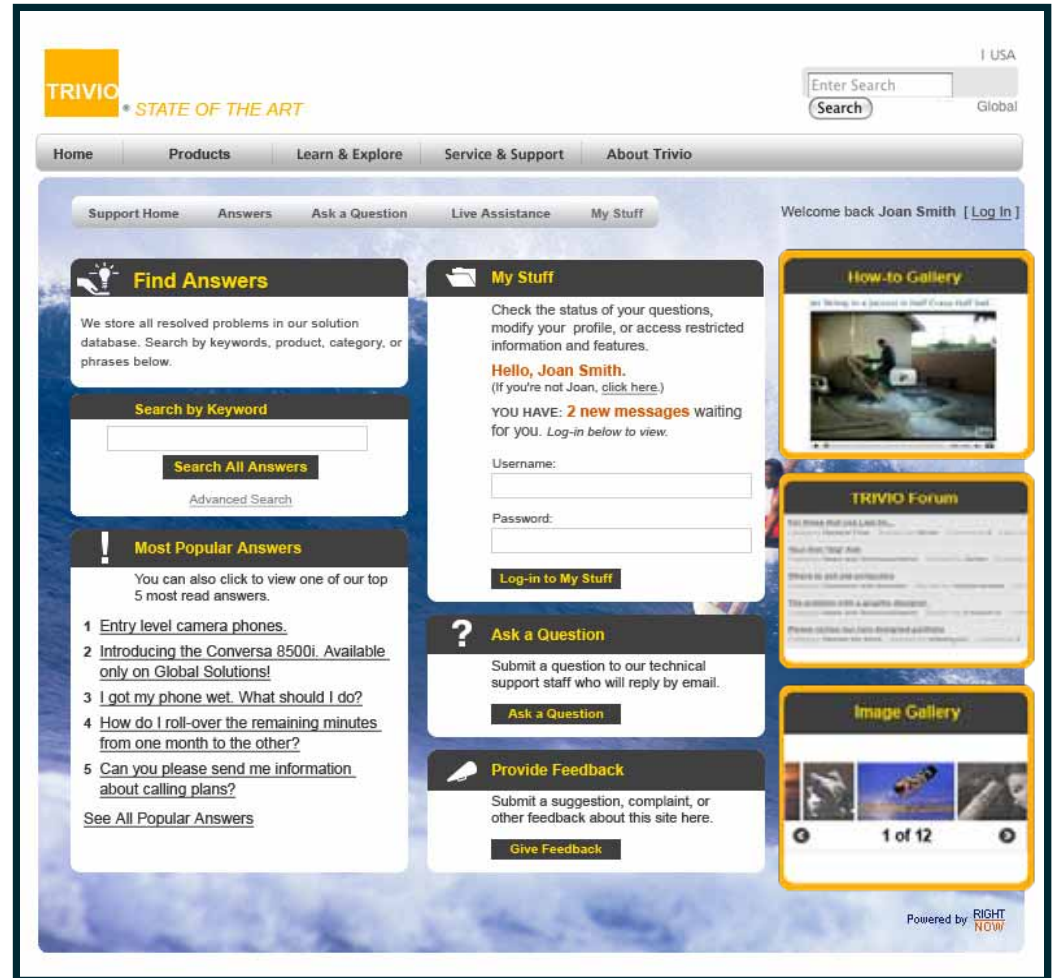


- Customer Portal G.A.
- Guided Assistance for Agent
- Co-Browse
- Chat
  - Proactive chat
  - Send HTML/XML
  - Return to queue
- Desktop Add-in Framework (.NET)
- MSI Installer Improvements
- Campaign Designer Redesign
- Feedback Improvements

# WHAT IS CUSTOMER PORTAL?

- A new end-user experience for RightNow that consists of pre-built, self-contained UI “components” (widgets and templates).
- Delivered in the same look/feel as November 2007, provides much greater flexibility and control over the end user experience.
- Delivered as a set of tools and technologies that enable you to modify the end-user experience without relying on RightNow Pro Services.

- Out-of-the-box best practices for online customer self-service
- Portal Studio enables designers and developers to easily design and edit the online customer experience
- Quickly and easily layer in brand elements to your support site
- Quickly Flexibly mash up interactive Web 2.0 information your customers use to make informed decisions:
  - Video (e.g. YouTube)
  - Forums
  - Blogs



## Out-of-the-Box:

- Announcements
- Knowledge base
- Answer search
- My Stuff
- Ask a question
- Login
- Navigation
- Search
- Feedback
- Reports
- Chat
- Proactive chat (August)
- ...and many more

## "Create Your Own" ideas for a superior online experience:

- Community forums
- Blog
- Recommendation/rating sites
- YouTube video of your product
- Location/store finder
- Warranty extension/upgrade
- Other offers
- Phone wait time
- Shipping calculator
- RMA help

Enables designers and developers to easily design and edit the online customer experience

- Leverages industry standard 3<sup>rd</sup> party tools - Dreamweaver, WebDAV
- WYSIWYG tool for editing portal pages
- Libraries for adding Web 2.0 elements and brand templates
- Dreamweaver extension
- Portal Deployment Management

## Designer



### Toolset

Flash  
Photoshop  
Dreamweaver

## Developer



### Toolset

Java—Eclipse  
C#—Visual Studio  
Text Editor  
Dreamweaver

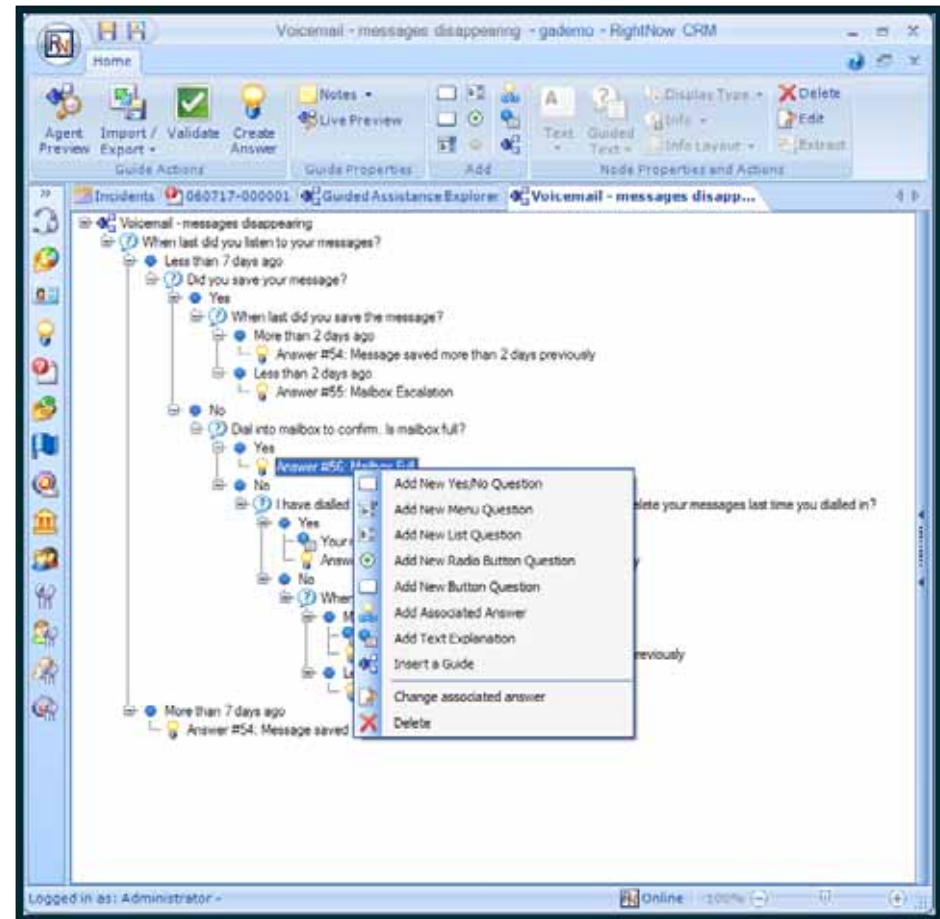
1. Easy to use and maintain
  - Lowers total cost of ownership
  - Configuration vs. customization
  - Seamless upgrades
  - Empowers customer to leverage their own resources to design/implement/deploy/maintain the end-user experience
2. Creates a much more interactive user experience
  - Embed Web 2.0 “widgets” such as maps, video, flash, as well as social media elements such as forums, blogs
  - Keep your customers on your site
3. Reinforces your brand
  - Infuse corporate brand elements into support site
  - Embed service, marketing, feedback experience components more broadly across their web presence

## Description:

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

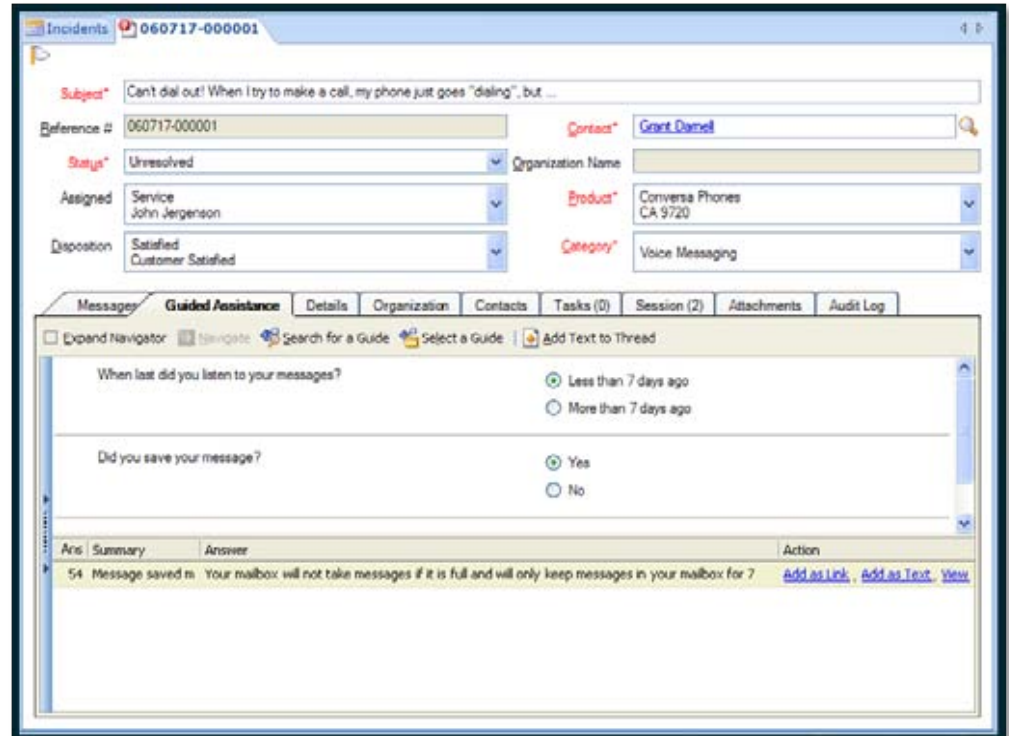
## Key Capabilities:

- 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 for a consumer to grant an agent permission to share the consumer's desktop during a chat or phone interaction

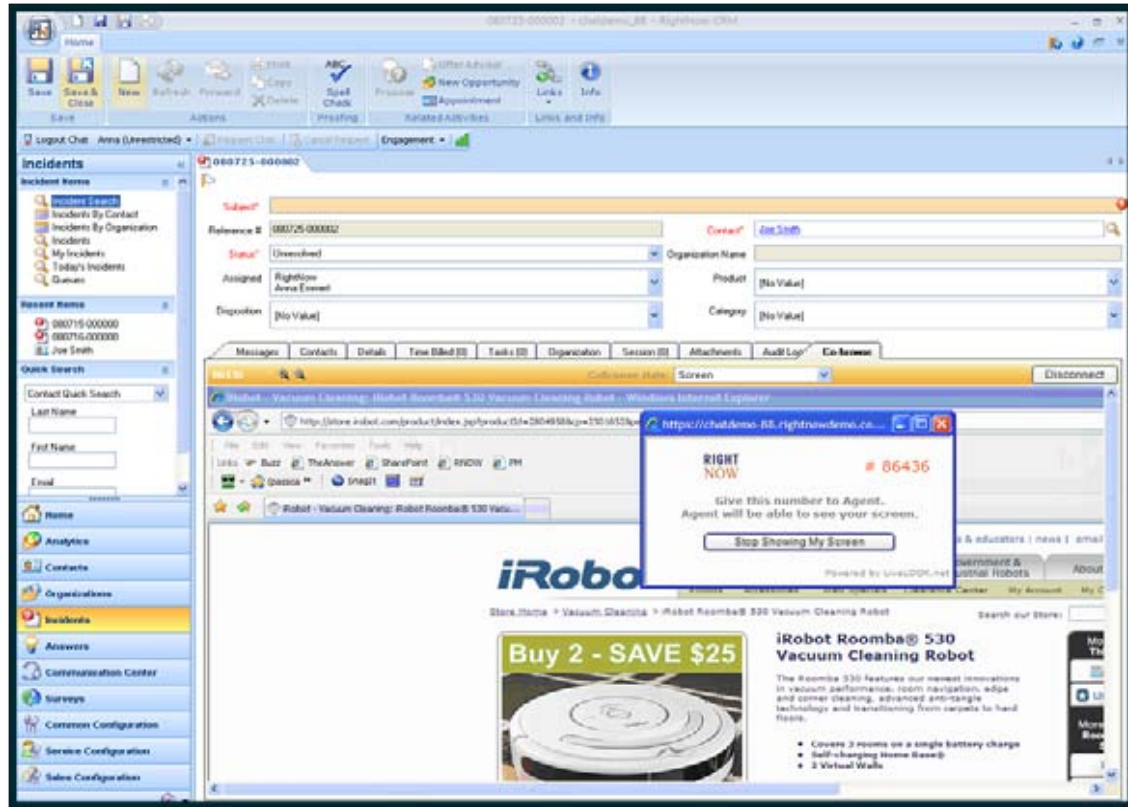
## Key Capabilities:

- Safe - permissions limit agent's control of the consumer's desktop
- Secure - works with existing firewalls
- Easy to implement and use
  - Works on all major browsers (IE, Firefox, Safari)
  - Handles Web 2.0 technologies (i.e. - Flash)
- Interactive
  - Keyboard, Mouse, and Pointer
- Tightly integrated within the on demand agent desktop

- Consumer clicks “Screen Sharing” on a website, gets a unique session ID, and gives it to the agent:



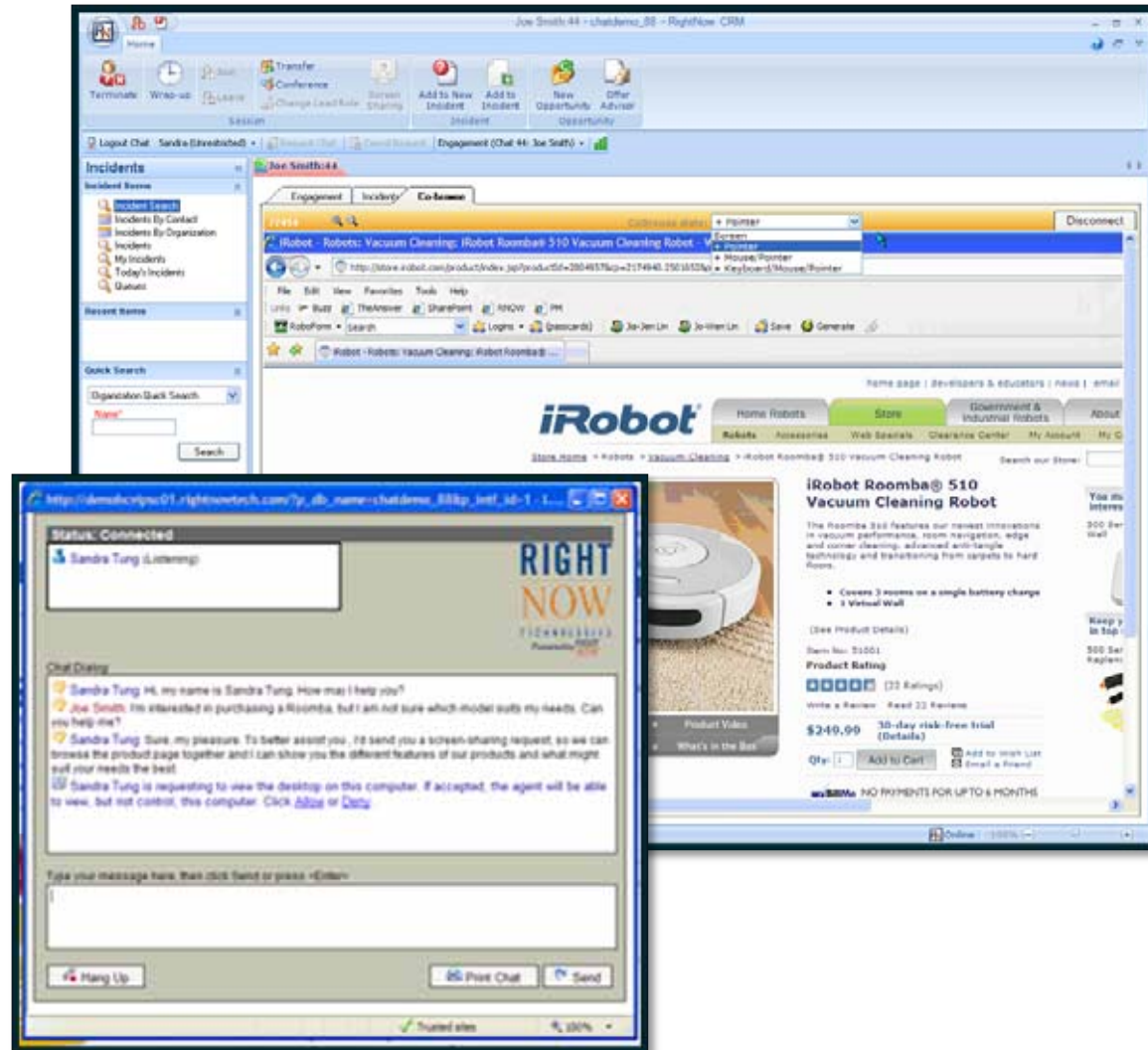
- Agent can immediately see Consumer's screen
- Consumer may stop showing screen at any time



# CO-BROWSE - CHAT INTERACTION

RIGHT  
NOW

- Agent sends invitation to Consumer to co-browse within the chat thread
- Consumer can allow or deny the request
- If the consumer's allow, the agent can see the consumer's screen
- Consumer may stop showing screen at any time



## Why it Matters:

- **Reduce operating cost**
  - Increase agent effectiveness
  - Improves first contact resolution rates
  - Improves agent productivity in complex support scenarios
  - Decreases miscommunication - agents and consumers are literally on the same page
- **Drive revenue**
  - Extends agents beyond support interaction
  - Facilitates consultative selling
  - Helps convert online visitors to customers
  - Decreases shopping cart abandonment
  - Increases average order size
- **Superior customer experience**
  - Visual communication creates more personal relationships with prospects and customers
  - Facilitates memorable interactions that build your brand

## Description:

- Ability to dynamically present a chat invitation *within the RN hosted web support pages* to a consumer based on specific, definable circumstances

## Key Capabilities:

- Chat invitation is presented when:
  - Consumer has been on the site for a configurable period of time, OR
  - Consumer has performed a configurable number of keyword searches, OR
  - A set of consumer profile characteristics apply (e.g.: customer is with a specific organization), AND
  - an agent is available

## Why it Matters:

- Improve “cancel save” rate, mitigate returns
- Reduces phone escalations
- Improves customer experience by:
  - Allowing consumers to opt-in to agent assistance for service scenarios
  - Only presenting chat option when agent is available

## Description:

- Enable your agents to leave their desk without changing their availability status

## Key Capabilities:

- Configure "Return to Queue"
  - Allows agents to decline or accept a chat session
  - Allow the agent to only accept or allow it to automatically go back into queue
  - Do not allow the agent to decline



## Why it Matters:

- Allows agents to move freely as they multi-task
- Particularly relevant for smaller contact centers

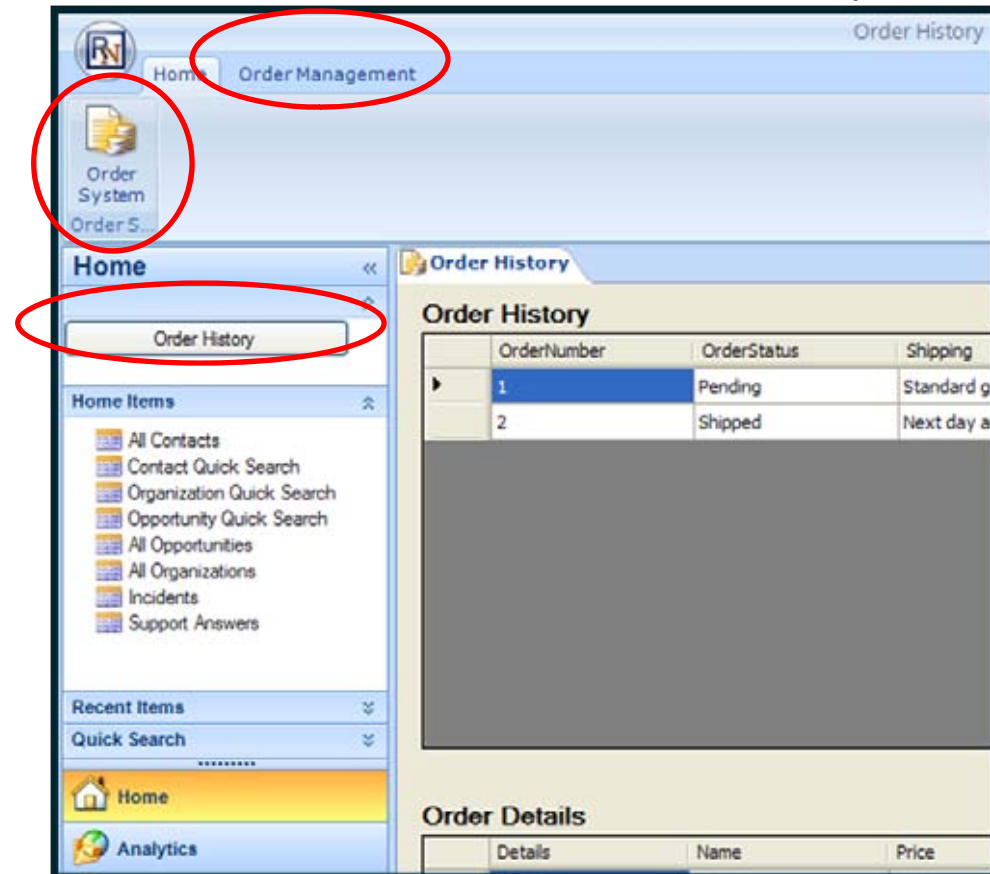
## Description:

- Enables customers and partners to add custom .NET components to the RightNow On Demand desktop
- Components may be added as a new navigation item in the nav bar that will invoke custom UI, as well as interact with external systems

## Why it Matters:

- Drives agent productivity
- Provides partners with a way to package and deliver custom functionality
- RightNow Professional Services will be able to leverage the add-in framework as a way to deliver customizations

Ribbon, Button and Nav Pane Example

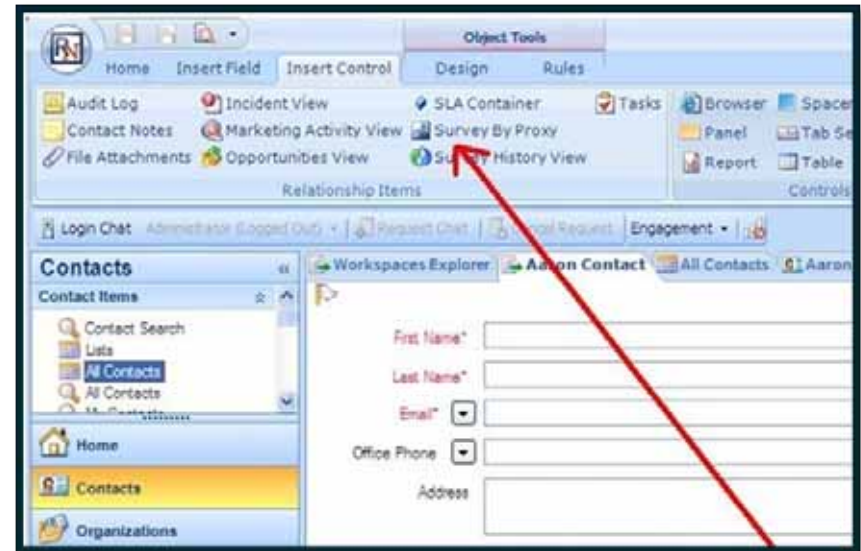


## Description:

- The ability for an agent to take a survey on behalf of a contact within their OnDemand Desktop workspace

## Why it Matters:

- Effectively adds a new channel for gathering customer feedback - phone
- Enables outbound calling for gathering voice of customer

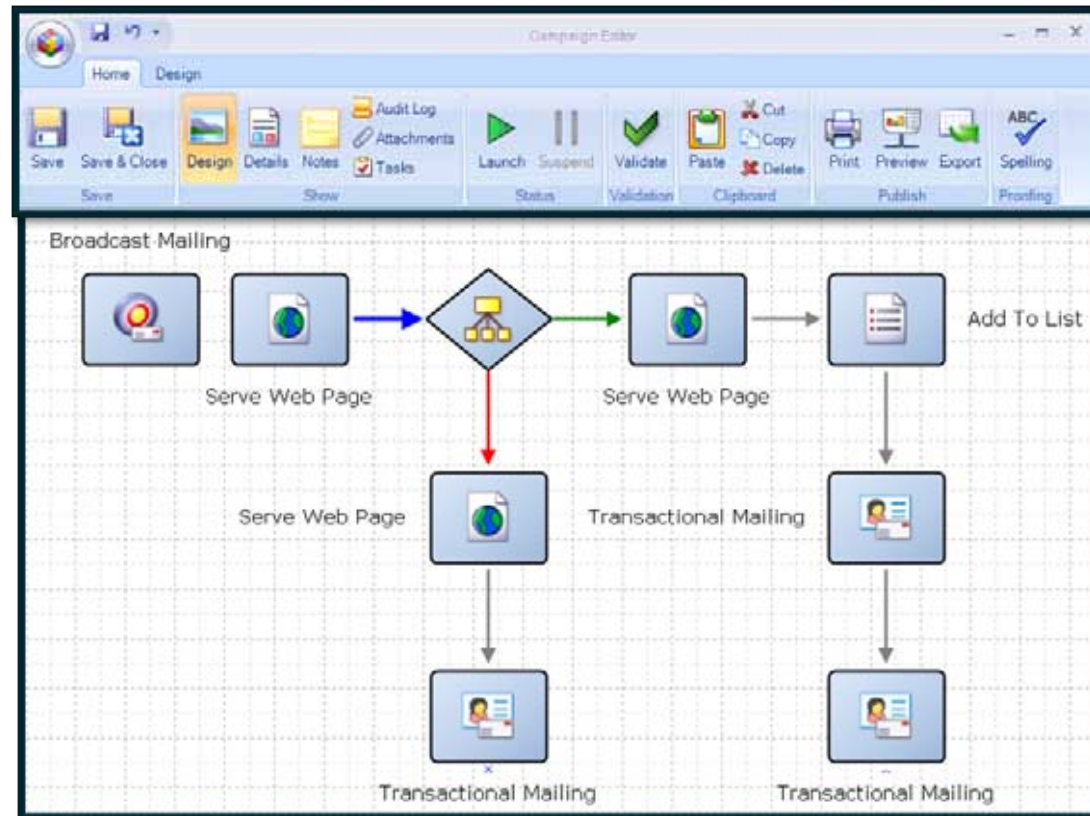


## Description:

- UI update of our campaign designer based upon the new windows workflow foundation. Includes:
  - Office fluent UI, extensive use of context sensitive ribbon tabs
  - Multi-select of elements
  - Copy/paste elements
  - Snap to grid
  - Configurable label position
  - In place label editing
  - Undo / Redo
  - Smart connectors

## Why it Matters:

- Improved usability and functionality
- Foundation to build additional capabilities



November '08

## Transforming the Contact Center



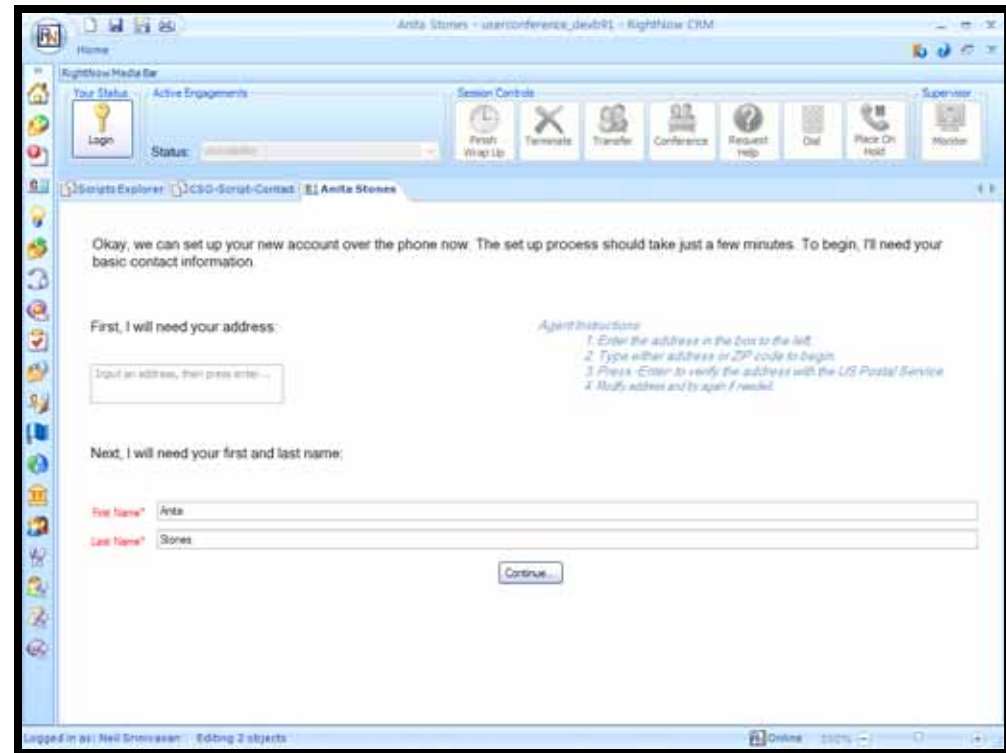
- Agent Scripting
- Extension Bar
- Microsoft Terminal Services Support
- ClickOnce Installer Improvements
- Unified Email Bounce Management
- Send Outlook Email Attachments
- Chat improvements
- Customizable Agent Login Screen
- Marketing and Feedback Improvements
- Analytics improvements

## Description:

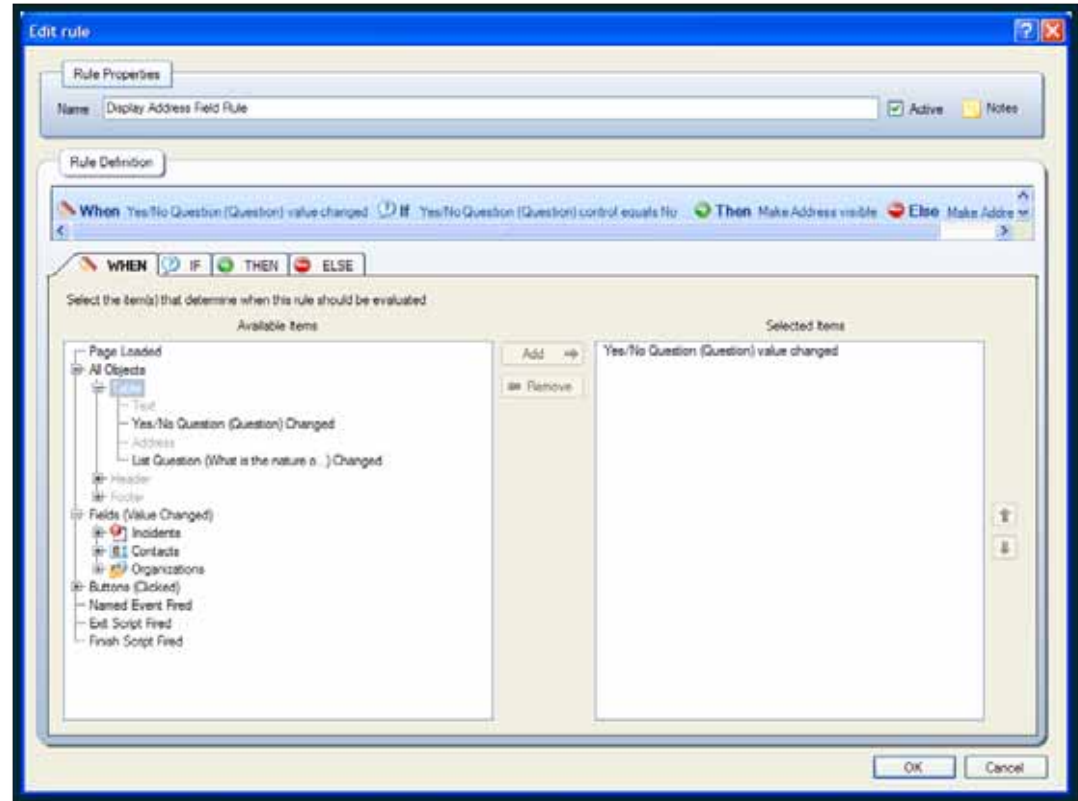
- Ability to provide agents with call scripts, enabling them to walk through a script with a customer

## Key Capabilities:

- New designer enables full 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

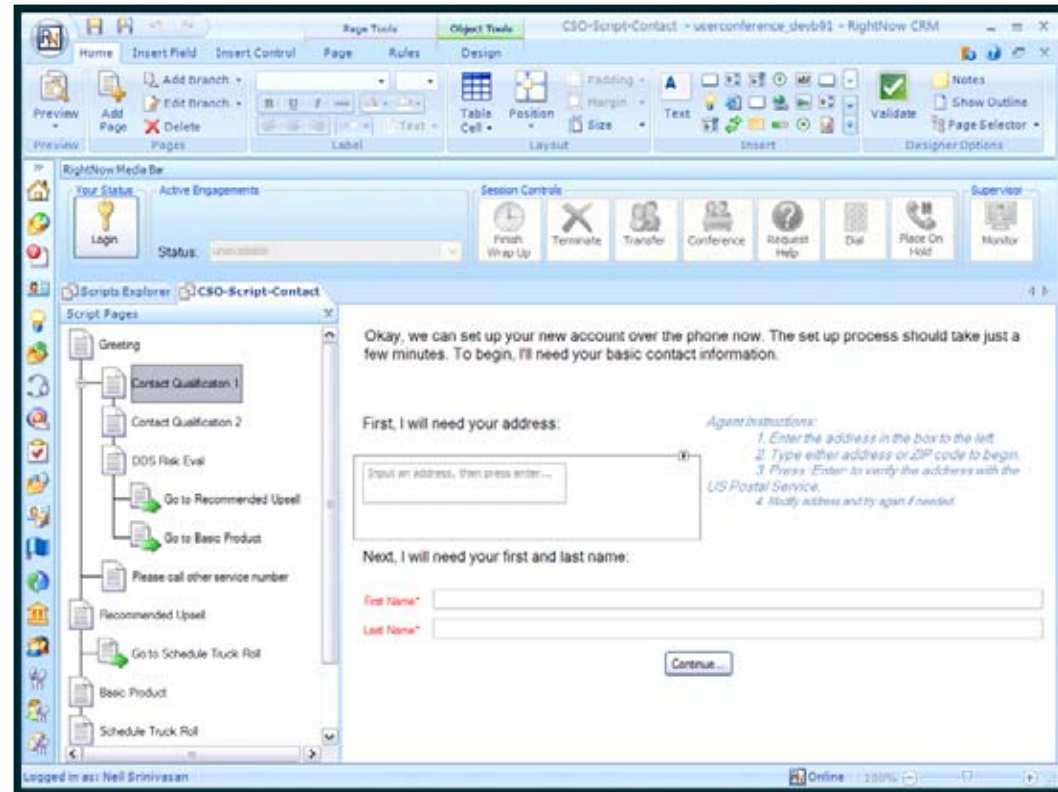


- Contextual rules enable control over the execution of the script
  - Control objects based on the customer, the agent, or other events in the script or interaction
  - Hide or display any object in the script
  - Automate script navigation
  - Set field values based on script actions



## Why it Matters:

- Enables consistent handling of customer interactions regardless of agent experience level
- Drives revenue by enabling agents to cross-sell/up-sell customers during the interaction
- For highly regulated industries - ensures agents communicate all required information verbatim to be in compliance
- Facilitates quicker ramp-up of new agents



## Description:

- New always-present control allows the creation of a custom add-in
  - E.g. "media" telephony control
- New capability for add-ins to launch workspaces or execute defined reports
- New capability for add-ins to add content to navigation lists



## Why it Matters:

- Enables custom add-ins for contact center scenarios including embedded telephony controls and screen pops
- Add-ins can be accessed via the RightNow navigation bar

## Description:

- The RightNow agent desktop will be supported in implementations using Microsoft Terminal Services

## Why it Matters:

- Many customers currently use Terminal Services as a means to deliver applications to the agent desktop
- Terminal Services allows older desktop machines to be used as agent desktops, eliminating potentially costly upgrades
- Application install and administration can be handled in a single location

## Description:

- Automatically handles “hard bounce” Service outbound emails
  - Flags the contact record email address as invalid
  - Flags the associated incident to indicate bounced email in history
- Provides agent with information regarding bounced emails
  - Alerts agent of invalid email address before they send an email using the RN “send on save” incident option
  - Generates a RN notification for agent when a service email bounces

## Why it Matters:

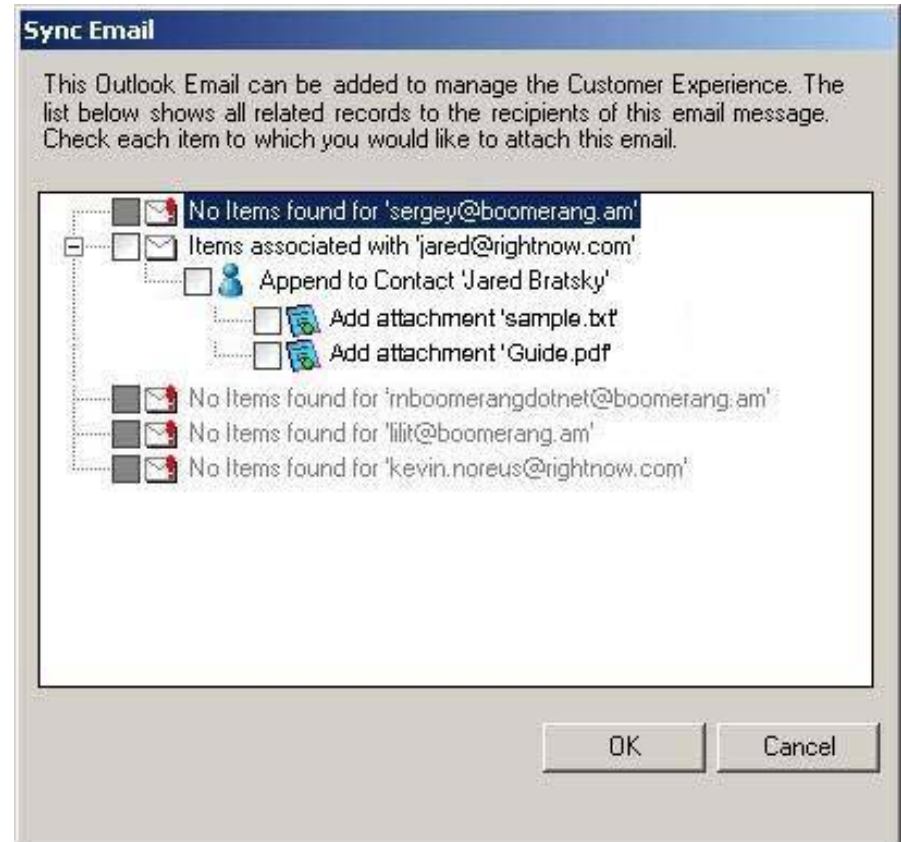
- Improved customer communication
- Improved customer data management
- Reduces time required to manage bounced email information

## Description:

- Option to send email file attachments when syncing emails from Outlook to RightNow

## Why it Matters:

- Saves time
- Ease of use



## Chat file attachments

### Description:

The consumer can attach a file to a Chat message and send to agent  
Easy to use – similar to email file attachment  
Attachment automatically stored with the incident

### Why it Matters:

- Improve the communication between consumer and agent
- Share more information
- Increase first contact resolutions

## Agent Availability Report

### Description:

Report the agent's statuses

- Available
- Unavailable

Report the submenu reasons

- On break, Training, Lunch, "Custom" entry

### Why it matters:

Improved management of Contact Center resources:

- Ability to report on the Agent's unavailability "reasons"
- Provide a complete view of agents activities when they are not managing chat sessions

## 30 Second Refresh on Agent/ Supervisor Snapshot Report

### Description:

The agent and supervisor snapshot reports display will be refreshed every 30 seconds  
Chat queue data will be written to the database every 30 seconds

### Why it matters:

More frequent updates to data for situations that require very short SLAs

# CUSTOMIZABLE AGENT LOGIN SCREEN

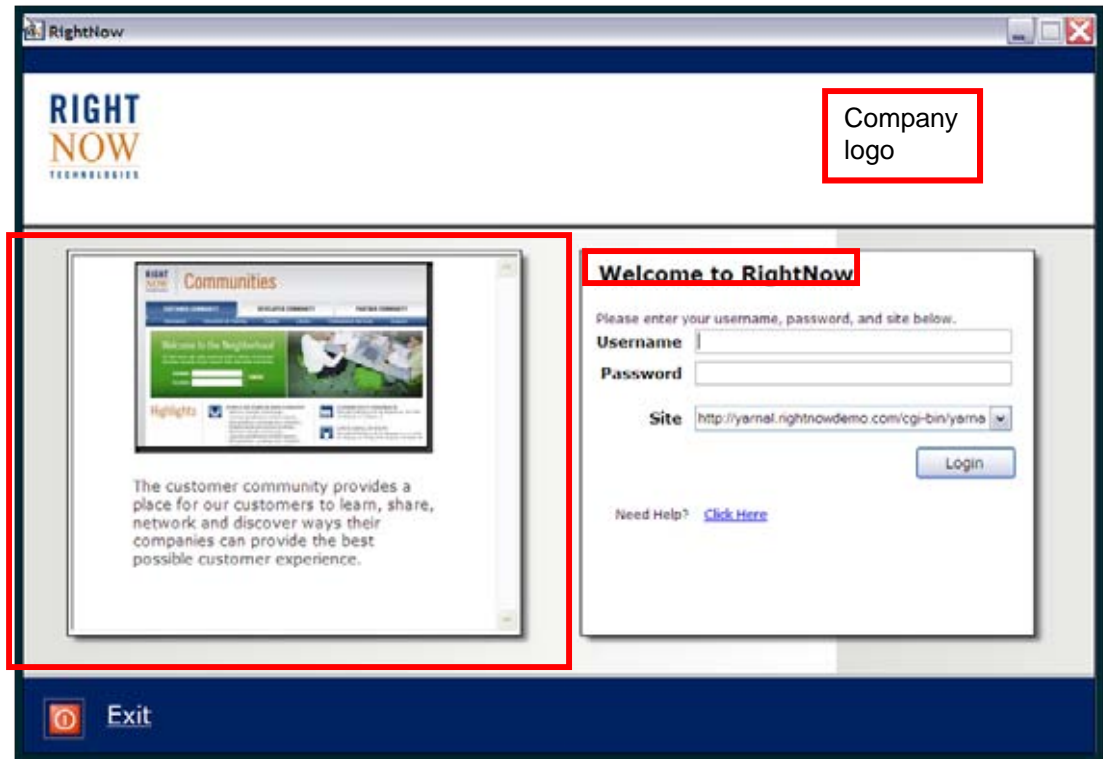
## Description:

### Ability to:

- Customize the message content by altering the reference URL
- Customize the "Welcome to RightNow" text
- Option to co-brand with your company logo

## Why it Matters:

- Provide more meaningful messages to your agents
- Leverage your company brand on the agent login screen

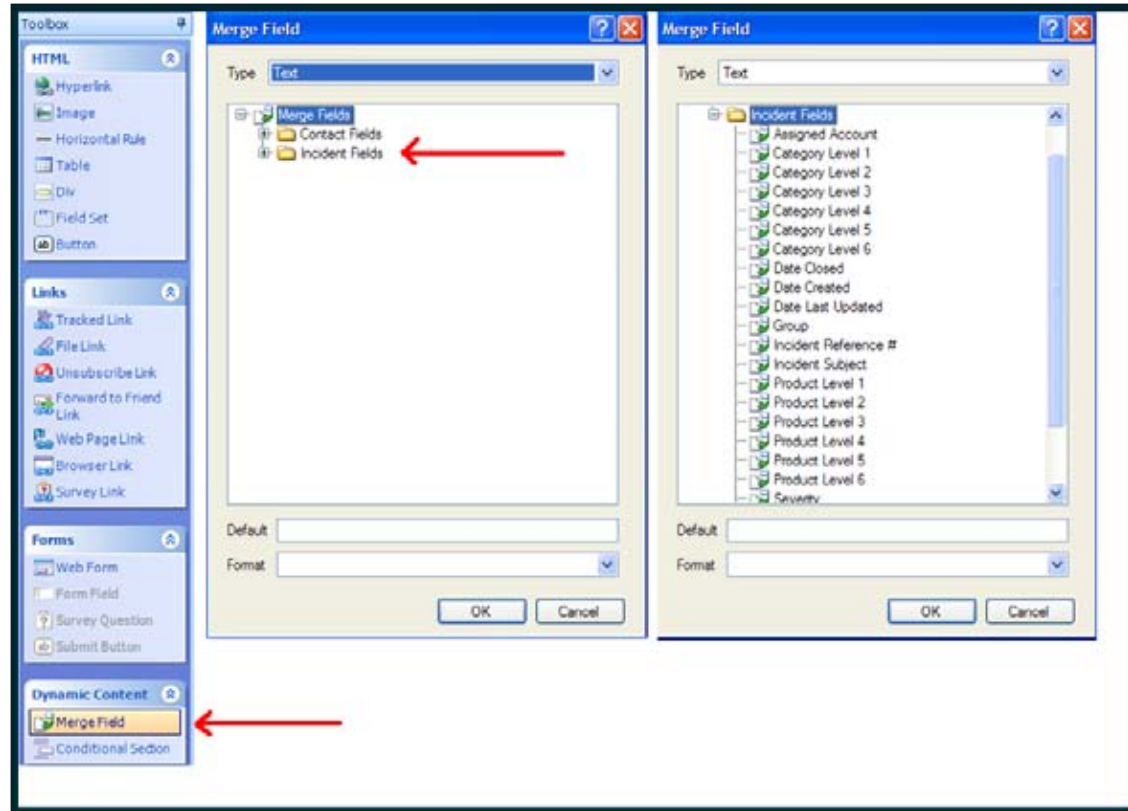


## Description:

- The ability to merge incident fields into documents/surveys

## Why it Matters:

- More personalized & relevant emails for the customer
- No need for professional services to merge these fields into emails



# FEEDBACK IMPROVEMENTS - SURVEY EXPIRATION MANAGEMENT

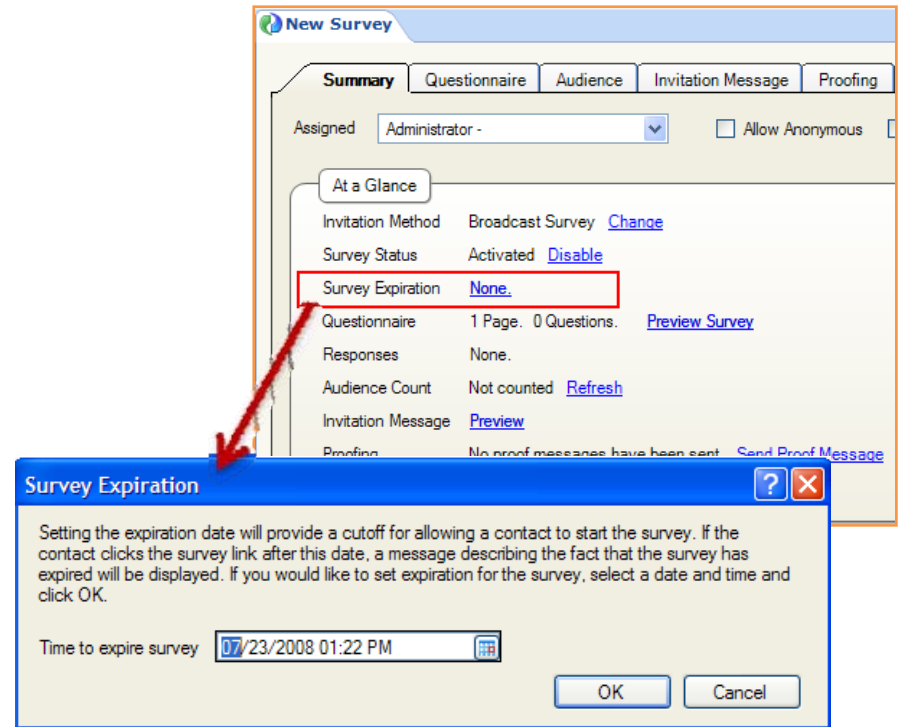
RIGHT  
NOW.

## Description:

- 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.

## Why it Matters:

- Better customer experience
- Saves time - removes the need to remember to manually disabling the survey on a certain date



## Description:

- Large report background processing
  - Reports will automatically be run in the background on a replicated database environment
  - Feedback that report is being run in background
  - Alert when report is ready

## Why it Matters:

- Decreases load on operational CRM environment
- Helps avoid situations where users may accidentally run multiple duplicate reports
- Increases responsiveness in getting large report results

- Full list of slideshows by module
  - <http://www.rightnow.com/resource-slideshows.php>
- Release Resources Page in Customer Community
  - <http://community.rightnow.com/customer/library/release/>

SUMMIT 08



THANK YOU

**RIGHT  
NOW.**