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**EMPOWER FRONTLINE
EMPLOYEES: AGENT DESKTOP 101**

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8 Steps to Great Customer Experiences

1. Establish a Knowledge Foundation
2. Empower Customers
3. Empower Frontline Employees
4. Offer Multi-Channel Choice
5. Listen to Your Customers
6. Design Seamless Experiences
7. Engage Proactively
8. Measure and Improve Continuously

Agenda

- ▶ The Contextual Agent Desktop
- ▶ The Contextual Agent Desktop Toolsets
 - Contextual Workspaces
 - Guided Assistance
 - Agent Scripting
- ▶ Workflow Demo
 - Workflow in Action
 - The Workflow Designer

Contextual Agent Desktop

- ▶ Providing the agent with what they need when they need it
- ▶ Making the desktop as relevant as possible based on
 - Who the customer is
 - Who the agent is
 - What is happening during the interaction
- ▶ Contextual toolsets
 - Contextual Workspaces (February '08)
 - Guided Assistance (August '08)
 - Agent Scripting (November '08)
 - Desktop Workflow (August '09)

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CONTEXTUAL DESKTOP TOOLSETS



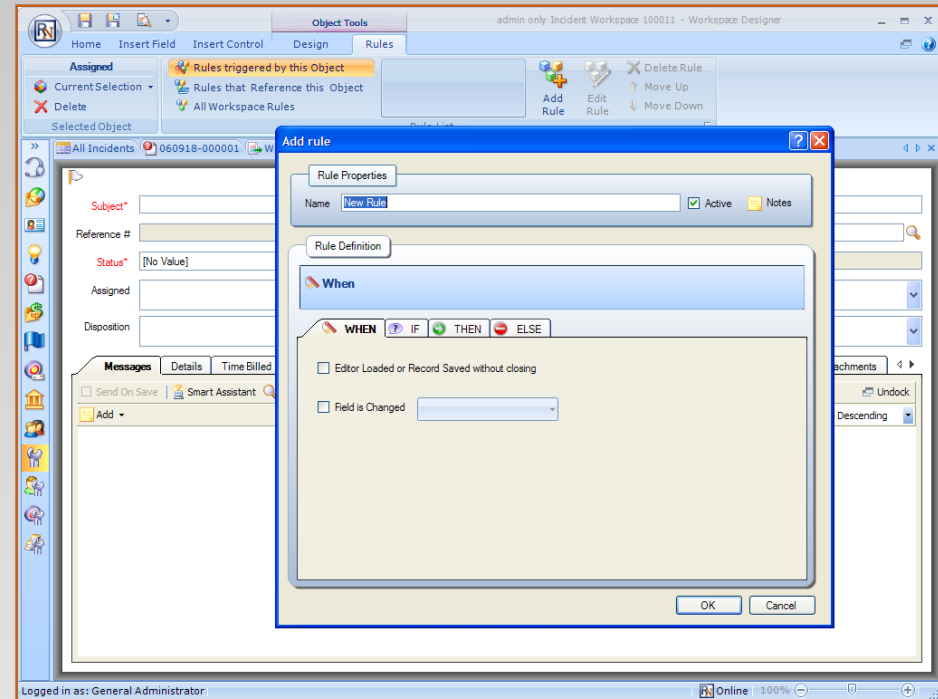
Contextual Workspaces

Description

- ▶ Ability for information provided on the agent desktop to dynamically change based on knowledge about the customer or by the actions taken by an agent.

Key Benefits

- ▶ Personalized customer experience and agent productivity
- ▶ 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



Contextual Workspaces

Why It Matters

- ▶ Ability to provide a personalized agent experience
- ▶ Increase agent efficiency by providing only the information and fields that are relevant to the specific function an agent is performing
- ▶ Ability to tailor the agent desktop or workspace to meet complex enterprise business needs
- ▶ Adaptable to your future needs
- ▶ Ability to integrate with and leverage existing enterprise infrastructure

The screenshot displays a software interface titled "060918-000001 - Workspace Designer". The interface is divided into several sections:

- Incidents Panel (Left):** Contains a tree view with "Incident Items" (My Inbox (default), Organizations, Queues, Groups, Today's Incidents, Contacts, All Incidents, Last Name) and "Recent Items" (060918-000001). A "Quick Search" field is also present.
- Form Fields (Center):**
 - Subject:** Problem with cell phone
 - Reference #:** 060918-000001
 - Status:** Unresolved
 - Assigned:** Automation andy -
 - Disposition:** Customer Complaint (D8), Product Defect (D8.1)
 - Contact:** Andy Boraman
 - 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)
- Returned Material Authorization (Right):**
 - RMA #:** [Field]
 - Date Issued:** Thu Dec 06 03:31:15 PST 2007
 - Customer Information:**
 - Customer #:** [Field]
 - Purchase Order #:** [Field]
 - Telephone #:** [Field]
 - Contact Name:** Wells, Jane
 - Institution:** [Field]
 - Will product be returned?** Yes No
 - Ship Via:** [Field]
 - Shipper #:** [Field]
 - Quantity:** [Field]
 - Catalog/Lot#:** [Field]
 - Product Name:** [Field]
 - Catalog/Lot#:** [Field]
 - Quantity:** [Field]

At the bottom, the status bar shows "Logged in as: General Administrator" and "Editing 2 objects".

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GUIDED ASSISTANCE



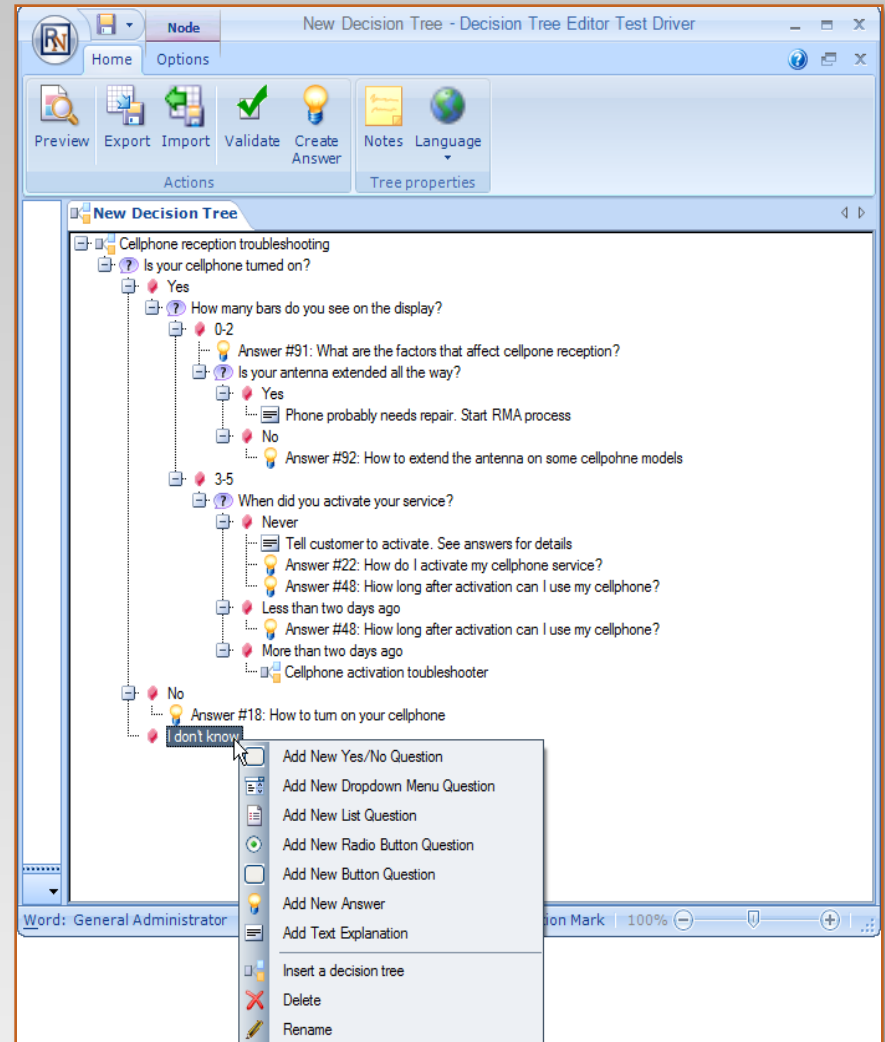
Guided Assistance

Description:

- ▶ Built for quick trouble-shooting through a series of questions/answers to direct agents to appropriate answers. Guided assistance can be used in combination with broader agent scripting capabilities.

Key Capabilities:

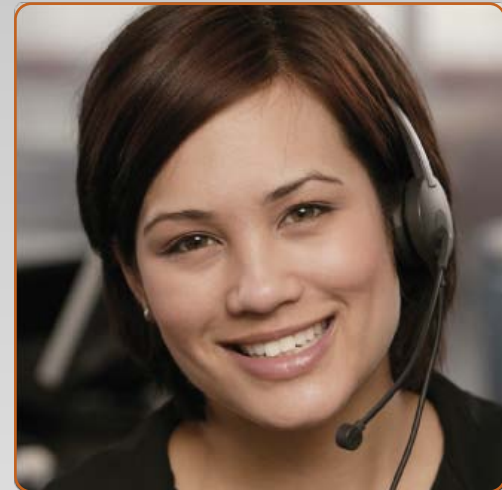
- ▶ Quick creation and editing of guides
- ▶ Ability to add image and HTML to questions
- ▶ Reusability of the guides and branches
- ▶ Customer responses are stored on the incident record for review



Guided Assistance

Why It Matters:

- ▶ Consistency
- ▶ Model the best practices of your best agents
- ▶ Improve First Contact Resolution by guiding the agent to the right answer - the first time
- ▶ Improves the customer experience by enabling faster resolution, fewer transfers



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AGENT SCRIPTING



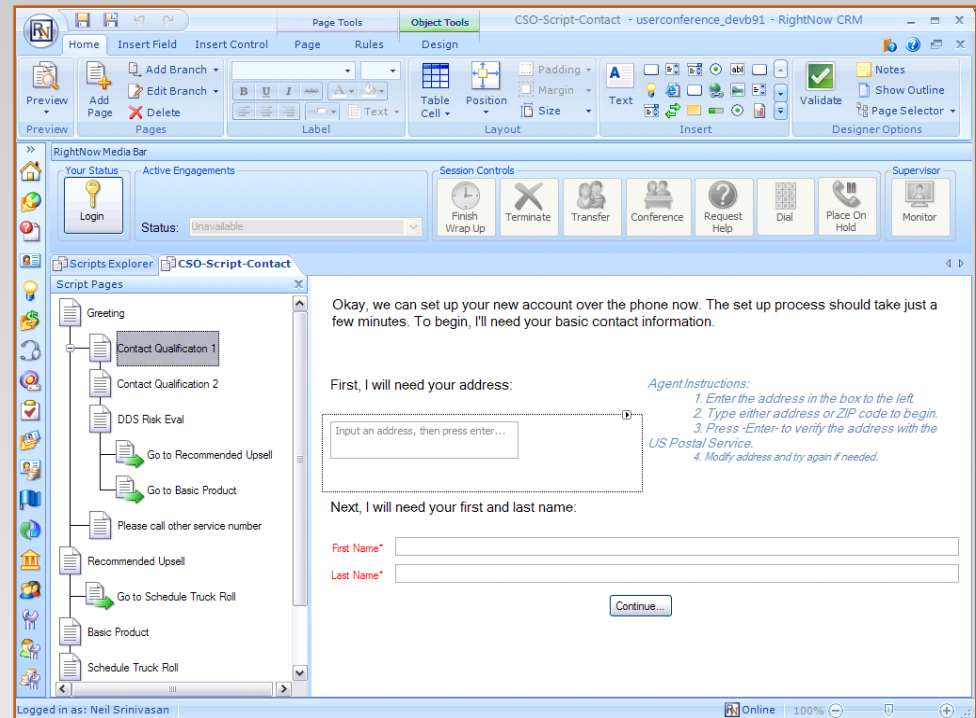
Agent Scripting

Description:

- ▶ Ability to provide agents with flexible call scripts, enabling them to consistently walk through customer interactions regardless of agent skill or experience.

Key Capabilities:

- ▶ Streamline and automate agent process
- ▶ Graphical designer enables full control (WYSIWYG)
- ▶ Complex branching logic
- ▶ Ability to capture and validate data right within scripts
- ▶ Ability to import and export scripts



Agent Call Scripting Designer

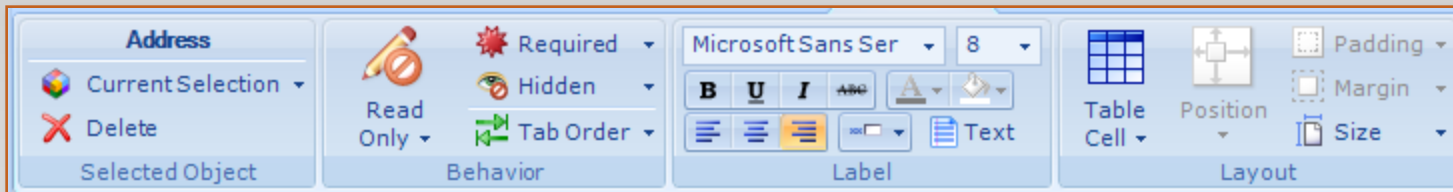
The screenshot shows the Agent Call Scripting Designer interface. The main window displays a script page titled "Page {PageNumber} of {NumberOfPages}". The page content includes a greeting: "Hello, \$contacts.name.first, for security reasons I need to verify your address:". Below this is a field for "\$contacts.addr.street" and a question: "Is this correct?". The question has two radio buttons labeled "Yes" and "No". Below the question is a field for "Address*" and a list of call types: "Customer service", "Sales", and "Technical Support". At the bottom of the page are navigation buttons: "Beginning", "Previous", "Next", and "Exit".

Callouts and their descriptions:

- Add pages and branches with a single click**: Points to the "Add Page" and "Add Branch" buttons in the "Pages" group of the ribbon.
- Add tables for precise layout control**: Points to the "Table" button in the "Layout" group of the ribbon.
- Define contextual rules to control the display & behavior of the script**: Points to the "Rules" button in the "Rules" group of the ribbon.
- Add objects: images, HTML, questions, browser controls, reports....**: Points to the "Insert" group of the ribbon.
- Validate script flow to catch errors**: Points to the "Validate" button in the "Designer Options" group of the ribbon.
- Page progress tells the agent where they are in the script**: Points to the "Page {PageNumber} of {NumberOfPages}" header.
- Page branching is illustrated for quick reference in the side-bar**: Points to the "Script Pages" sidebar showing a flow from Page 1 to Page 6.
- Add merge fields to personalize the script & display data**: Points to the "\$contacts.name.first" and "\$contacts.addr.street" fields in the script content.
- Create questions with yes/no, multi-select, list and radio button answers**: Points to the "Is this correct?" question and the list of call types.
- Navigation controls take the agent to the next step**: Points to the "Next" button at the bottom of the page.
- Preview the script during design**: Points to the "Preview" button in the "Designer Options" group of the ribbon.

Agent Call Scripting Capabilities

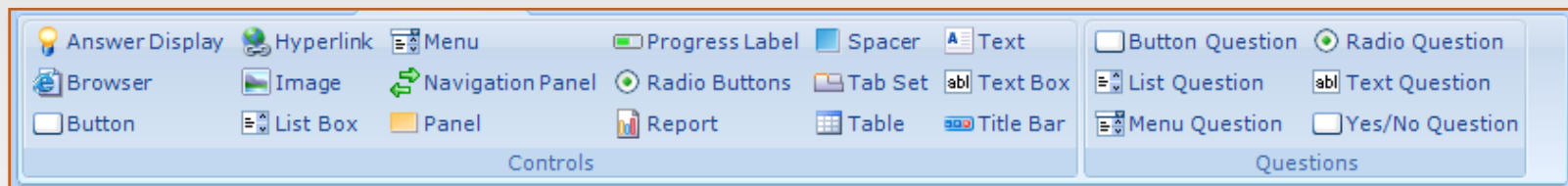
- ▶ Complete formatting control of text and objects
 - Tables can be used for precise layout control
 - Set read-only, required and display properties for questions and fields



- ▶ Insert fields for data capture and validation



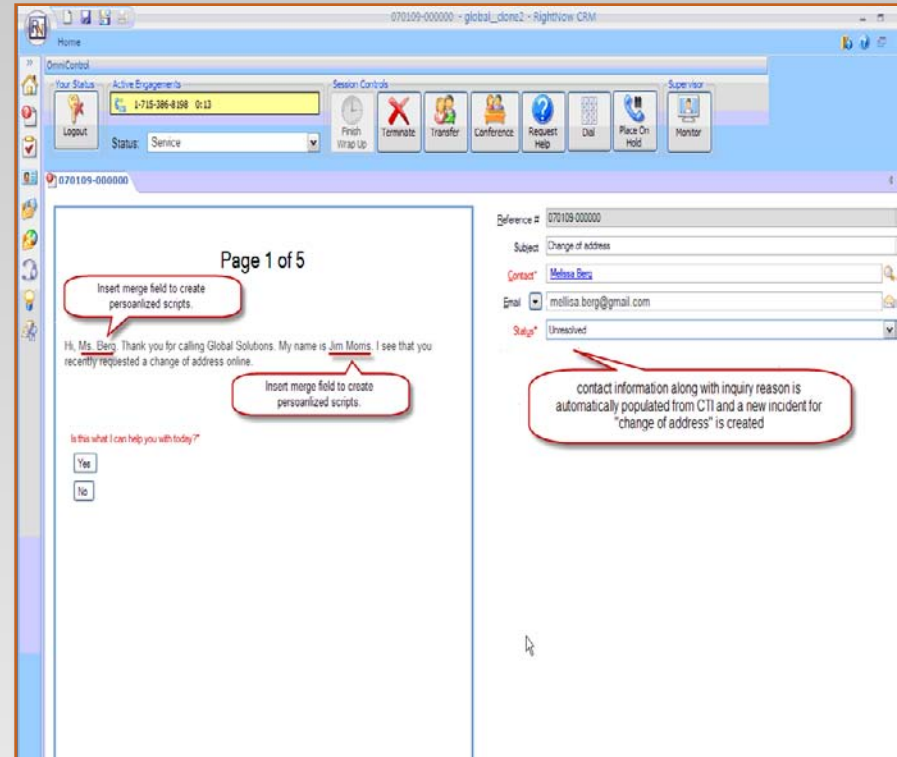
- ▶ A wide range of objects, questions, and controls are available to customize the script to the business needs



Agent Scripting

Why It Matters:

- ▶ Consistent handling of customer interactions
- ▶ Drives revenue
- ▶ Information exchange compliance
- ▶ Quicker agent ramp-up
- ▶ Intuitive interface enables business users to create scripts



Scripting vs. Guided Assistance

- ▶ Scripting is much more powerful and flexible than Guided Assistance
- ▶ Think of Guided Assistance as a trouble-shooter
- ▶ The goal is to direct an agent to an answer by asking the customer questions
- ▶ Scripts are more versatile and can be applied to many business cases
- ▶ Guides are easier and faster to create than scripts
- ▶ The script designer has more control over script layout and can add elements such as workspace fields, reports, surveys, etc.

The screenshot displays the RightNow CRM interface for a Voicemail - messages disappearing case. The main window shows a flowchart for a guided assistance script. The flowchart starts with the question "When last did you listen to your messages?". If the answer is "Less than 7 days ago", it asks "Did you save your message?". If "Yes", it asks "When last did you save the message?". If "More than 2 days ago", it provides "Answer #54: Message saved more than 2 days previously". If "Less than 2 days ago", it provides "Answer #55: Mailbox Escalation". If "No", it asks "Dial into mailbox to confirm. Is mailbox full?". If "Yes", it provides "Answer #56: Mailbox Full". If "No", it asks "I have dialled". If "Yes", it asks "When did you dial?". If "More than 7 days ago", it provides "Answer #54: Message saved".

A context menu is open over the flowchart, listing actions such as "Add New Yes/No Question", "Add New Menu Question", "Add New List Question", "Add New Radio Button Question", "Add New Button Question", "Add Associated Answer", "Add Text Explanation", "Insert a Guide", "Change associated answer", and "Delete".

The interface includes a top toolbar with "Agent Preview", "Import / Export", "Validate", "Create Answer", "Live Preview", "Notes", "Display Type", "Delete", "Text", "Guided Text", "Info", "Info Layout", "Extract", and "Edit". The bottom of the window shows a form with "First Name*" and "Last Name*" fields and a "Continue..." button. The status bar at the bottom indicates "Logged in as: Administrator" and "Logged in as: Neil Srinivasan".

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DESKTOP WORKFLOW



Desktop Workflow

Description:

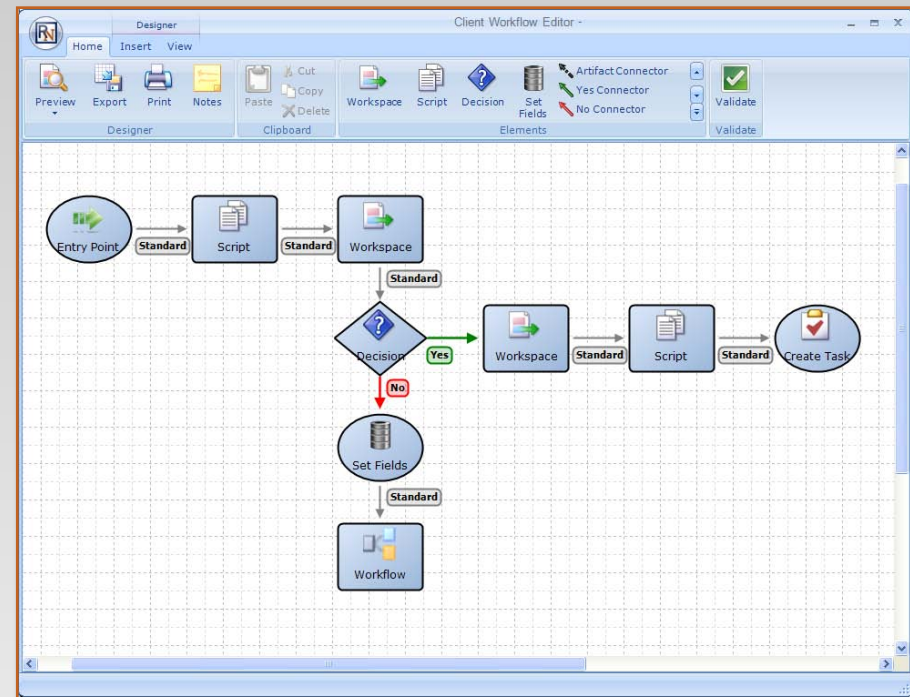
Ability to step an agent through a business process and automate tasks behind the scenes

Key Capabilities:

- ▶ Walk agents through multiple workspaces
- ▶ Chain multiple scripts or workflows together
- ▶ Automate tasks in the background
- ▶ Drag & drop designer for fast creation of flows

Why It Matters:

- ▶ Improve agent efficiency & effectiveness
- ▶ Ensure consistent handling of business processes
- ▶ Provide the agent with the right tools at the right time in the context of the interaction



When is it useful?

- ▶ **Streamline an existing process**
 - Improve agent efficiency
 - Automation of common tasks
- ▶ **Guide an agent through an interaction**
 - Maintain consistent customer experiences
- ▶ **Simplify complex workspaces with lots of controls/fields**
 - Improve workspace performance
 - Easier to manage rules

Additional Use Cases

▶ Sales process

- Ensure sales reps follow the process for opportunities moving through the pipeline
- Require entry of specific information at certain stages

▶ Cross-sell/up-sell

- Trigger cross-sell/up-sell scripts to be launched at the end of an incident interaction
- Automatically create opportunity records in the background and assign the appropriate rep or territory

▶ Internal Business Processes

- Ensure tasks are assigned after customer interactions
- Capture necessary approvals
- Send notifications to other employees as part of a process

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AGENT DESKTOP DEMO



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QUESTIONS?

