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BEST PRACTICES OF RIGHTNOW FEEDBACK

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Agenda

- ▶ **The Top 7s for Optimized Response Rates & Reporting** (30 mins)
 - Questions Creation Best Practices
 - Survey Construction/Execution Best Practices
 - Feedback Analytics Best Practices
- ▶ **J&P Cycles Customer Showcase** (15 mins)
- ▶ **Feedback Forum Review** (10 mins)
- ▶ **Questions** (5 mins)

Top 7 Question Creation Best Practices

1. Short & Sweet
2. Relevant
3. Straight-Forward
4. Use Everyday Language
5. Careful Answer Selections
6. Clearly Defined Labels
7. Watch Open-Ended Questions

Best Practice #1

Short & Sweet

Timeliness of Shipment

Which of the choices below most accurately describes the timeliness of your order shipment and satisfaction of service?

- Arrived earlier than promised - satisfied
- Arrived on the date promised - satisfied
- Arrived 1 day later than promised - satisfied
- Arrived 2 days later than promised - not satisfied
- Still hasn't arrived - extremely unhappy
- Arrived 3 day later than promised - unhappy
- Arrived - satisfied
- Arrived 1 week later than promised - extremely unhappy
- Arrived 2 weeks later than promised - extremely unhappy
- Back Ordered - considering cancelling order
- Other

Rate our Service

How would you rate our service?

- 5 - Outstanding
- 4 - Excellent
- 3 - Good
- 2 - Fair
- 1 - Poor

Best Practice #2

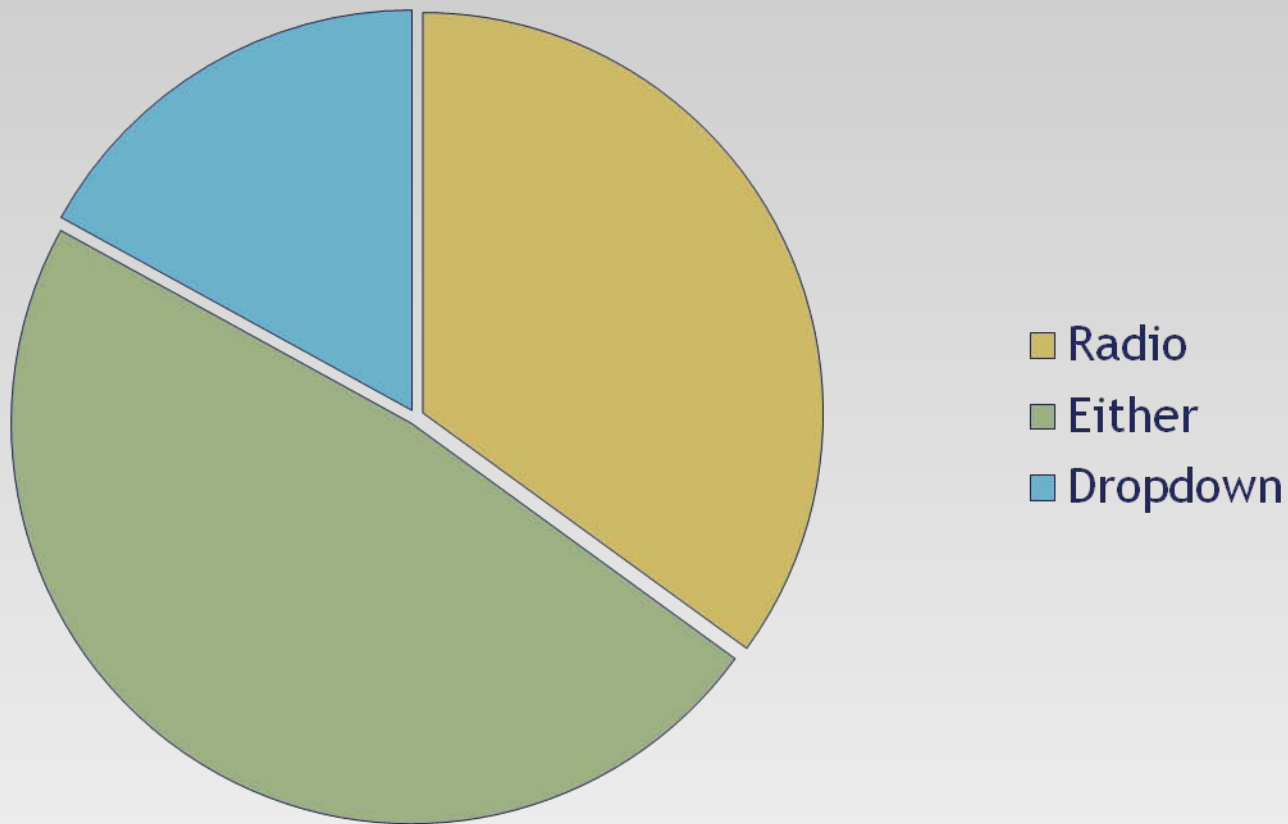
Relevant



Best Practice #3

Straight-forward

Respondent Preference/Question Type



Best Practice #4

Use Everyday Language

Is it conceivable that you will eulogize our concoction to a compatriot?



Best Practice #5

Careful Answer Selections

Which of the following categories best describes you?

- Single and living with parents
- Single and not living with parents
- Married or living with partner but no children
- Youngest child is under 3 years old
- Youngest child is 4-6 years old
- Youngest child is 7-9 years old
- Youngest child is 10-14 years old
- Youngest child is 15-19 years old
- Youngest child is independent
- I have grandchildren

Best Practice #6

Clearly Defined Labels

On a scale of 1 to 5, how satisfied are you with the response time of our agents?

- 1.
- 2.
- 3.
- 4.
- 5.

On a scale of 1 to 5, how satisfied are you with the response time of our agents?

1. Very Dissatisfied
2. Dissatisfied
3. Somewhat Satisfied
4. Satisfied
5. Very Satisfied



Best Practice #7

Watch Open-Ended Questions

- ▶ Include no more than three to five open-ended questions - one is usually enough.
- ▶ Never make open-ended answers mandatory.
- ▶ Don't use unless you plan to review them.

Top 7 Survey Construction/Execution Best Practices

1. Be Well-Timed
2. Get to the Point
3. Keep It Personal
4. Take Action
5. Motivate
6. Limit Frequency
7. Optimize & Test

Best Practice #1

Be Well-Timed



Best Practice #2

Get to the Point

Short vs. Long Surveys		
Survey Characteristics	Short	Long
Survey length (minutes)	6	21
Number of Questions	12	23
Completion Rate	31.4%	11%

Best Practice #3

Keep it Personal



Best Practice #4

Take Action



Best Practice #5

Motivate

“It’s not that I’m lazy, it’s that I just don’t care.”

Peter Gibbons - Office Space

Best Practice #6

Limit Frequency



Best Practice #7

Optimize & Test

Those who fail to learn from their mistakes are destined to repeat them.



Top 7 Feedback Analytics Best Practices

1. SCORE!
2. Chart It
3. Tell a Story
4. Organize
5. Analyze Free Text Responses
6. Trend it
7. Automate

Best Practices #1

SCORE

Rate our Service - sboyer98 - RightNow CRM

Home

Save Cancel Display Options Preview Question Info Spelling

Save Actions Proofing

Survey Question

Question Text: How would you rate our service?

Question Type: Choice

Choices

Display as: Radio

Respondent Selections: Respondent must answer this question

Add Choice

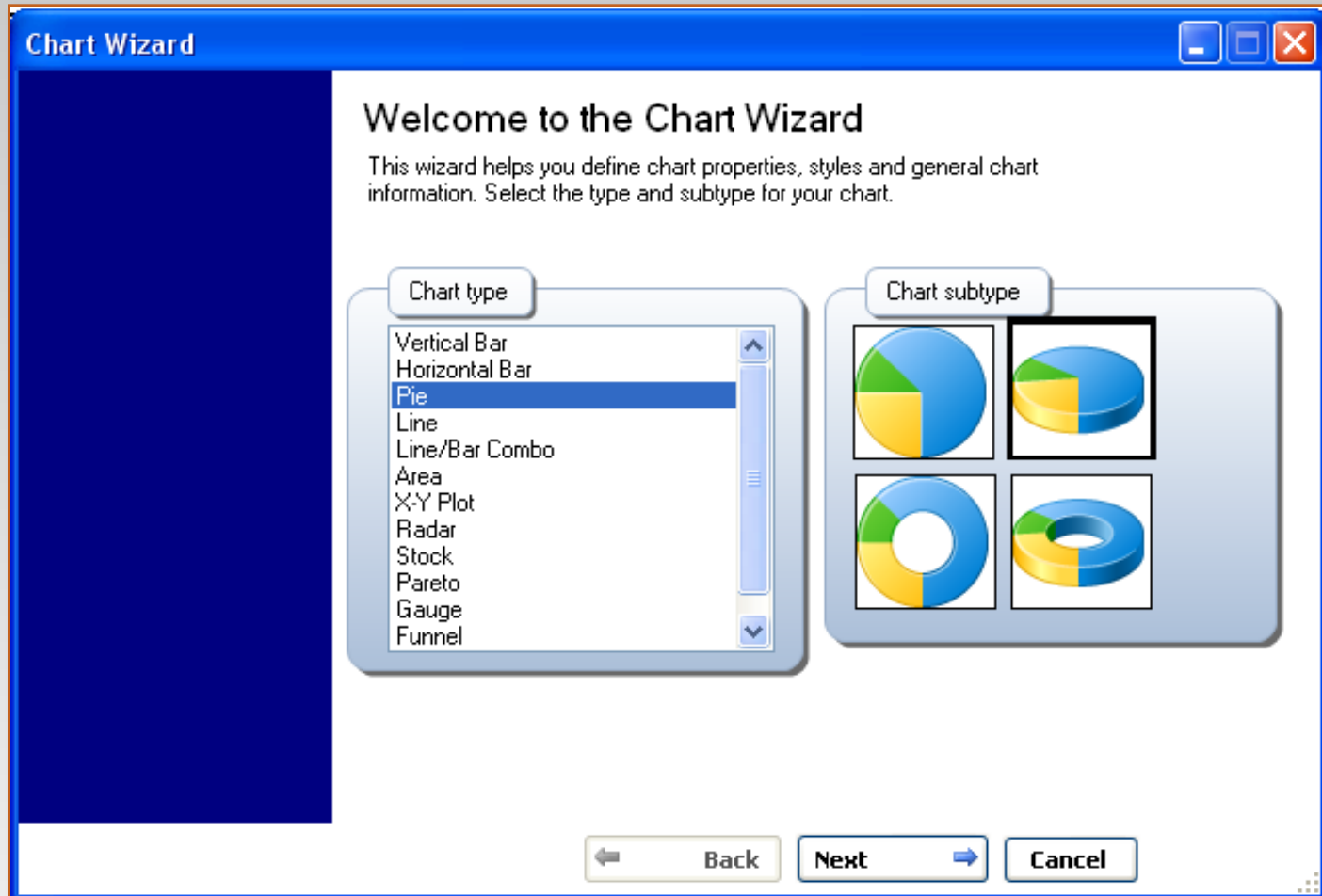
Choice Text	Score	Is "Other" Choice	Action
5 - Outstanding	5	No	Edit Remove
4 - Excellent	4	No	Edit Remove
3 - Good	3	No	Edit Remove
2 - Fair	2	No	Edit Remove
1 - Poor	1	No	Edit Remove

Randomize Choices Number of choices to display per line: 1

Logged in as: Admin Admin Online 100%

Best Practices #2

Chart It



Best Practice #3

Tell a Story

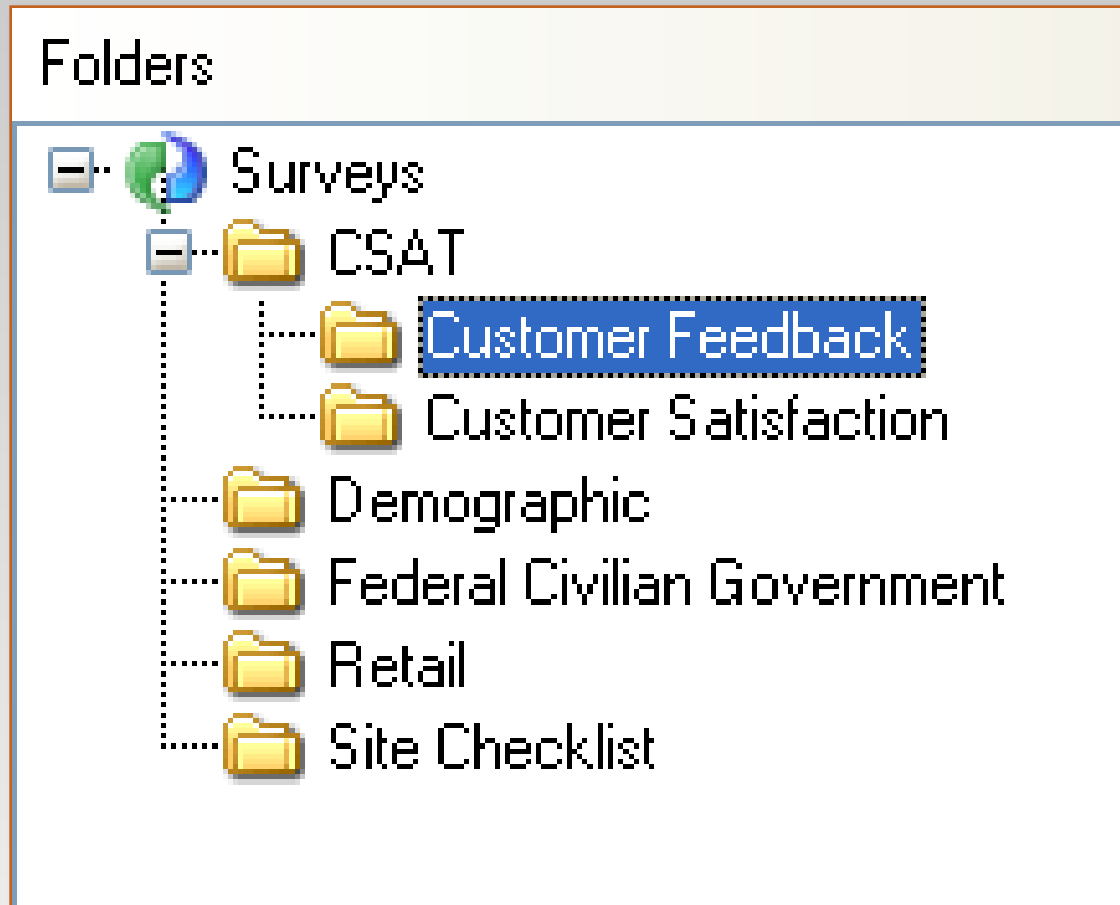
Survey Responses By Question		
Full Name	Response	Email Address
Question: Rate our Service (28 items)		
Anna Emmert	5 - Outstanding	amcmahon6@yahoo.com
Brenda Dell	4 - Excellent	rnowuser1@yahoo.com.inval
	5 - Outstanding	rnowuser1@yahoo.com.inval
Gerald Kesler	5 - Outstanding	gdrichey@hotmail.com.invali
Gloria Bacall	4 - Excellent	brewer_1999@yahoo.com.i
Jennifer Fernholtz	4 - Excellent	eggy.brandon@rightnow.co
	5 - Outstanding	eggy.brandon@rightnow.co
	5 - Outstanding	eggy.brandon@rightnow.co
Mary Carbone	5 - Outstanding	eralyn.smith@rightnow.co
No Value	5 - Outstanding	o Value
	1 - Poor	o Value
	1 - Poor	o Value
	5 - Outstanding	o Value
	5 - Outstanding	o Value
	4 - Excellent	o Value
	2 - Fair	o Value
	5 - Outstanding	o Value
	5 - Outstanding	o Value
	3 - Good	o Value
	1 - Poor	o Value
	4 - Excellent	o Value
	3 - Good	o Value
	5 - Outstanding	o Value
	3 - Good	No Value
	1 - Poor	No Value
	4 - Excellent	No Value
Patricia Grainger	5 - Outstanding	pguerrero@rightnow.com.in
Tom Wrightsville	4 - Excellent	twright@rightnow.com.invali

- Open
- Open Separately
- Print
- New
- Copy
- Assign
- Delete
- Forward Incident
- Propose Incident
- Email Contact
- Reject Opportunity
- Forward Opportunity
- Response Exclusion Flow**

Exclude survey from result driven feedback reports.

Best Practice #4

Organize



Best Practice #5

Analyze Free Text Responses

The screenshot shows a software window titled "Topic Monitoring Wizard" with a blue header bar. Below the header, the text "Getting Started" is followed by the instruction "Please select a survey question to analyze." A home icon is in the top right corner. The main area is divided into two sections: "Select a survey question" and "Select an action". The first section contains a dropdown menu and an information icon with the text "Question Text: None". The second section contains three radio button options, each with an icon and a description. At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".




Topic Monitoring Wizard

Getting Started
Please select a survey question to analyze.

Select a survey question

Question Text: None

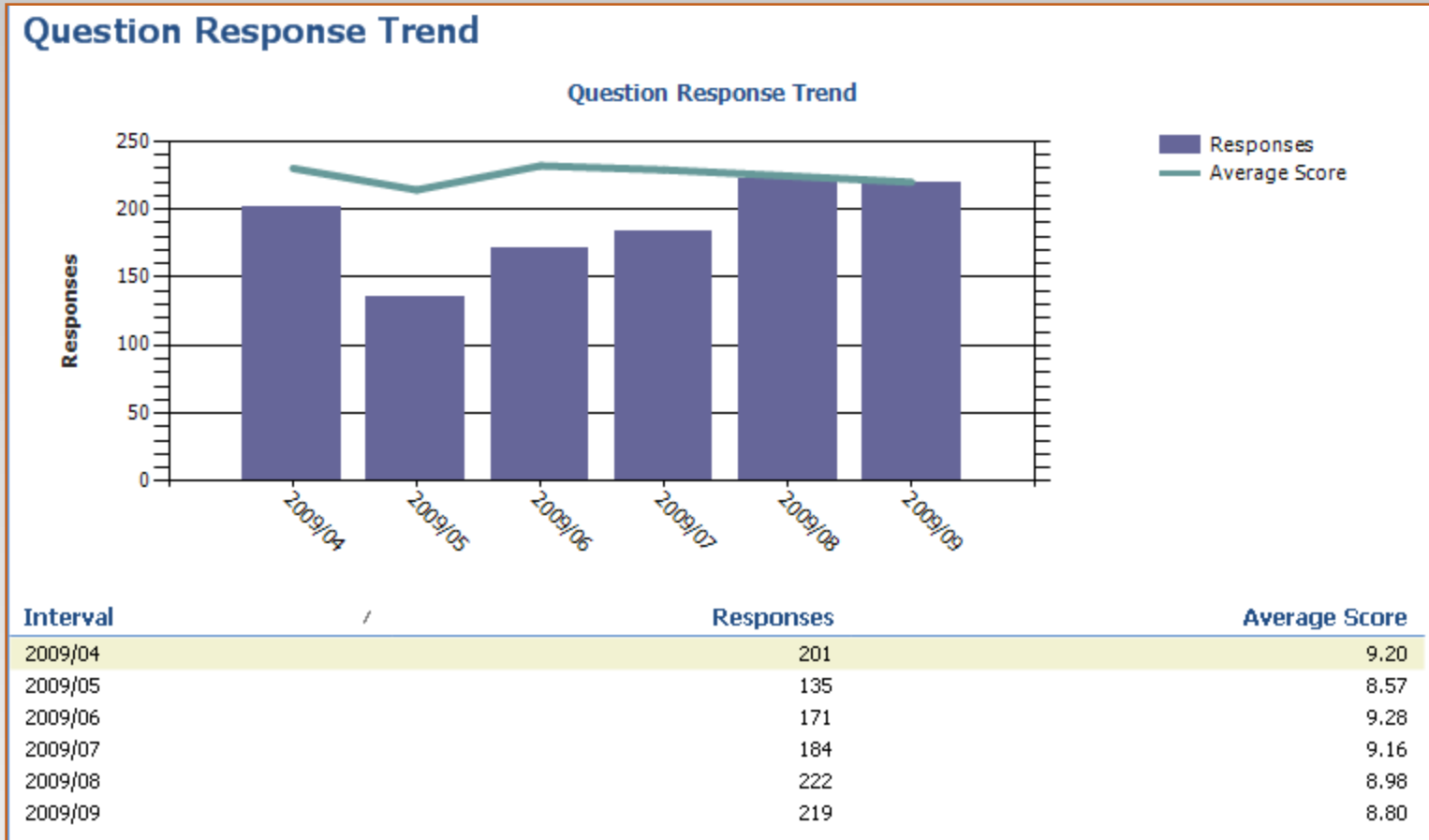
Select an action

-  Edit Themes/Keywords
This option sets the top level themes and keywords which will be used in the analysis.
-  Cluster Responses
The system will generate themes and keywords by analyzing the responses that currently exist. Any themes or keywords previously specified for this question/survey combination will be used.
-  View Previous Results
This option will show the previous clustering results if they are available.

Cancel < Back Next > Finish

Best Practice #6

Trend It



Best Practice #7

Automate

Edit Schedule

Name* Weekly Management Report

To -> Marketing;

Subject CSAT Weekly Report

Comment Please review the stats from this weeks CSAT surveys.

Format HTML Attachment (Images/Charts stored on the server)

Destination folder My Reports

Run report as Chris Morris

Recurrence [Every day every hour](#)

Filter values [Use defaults](#)

Alerts

To -> Add Alert

Alert Name	Exception	Last Fired	Current Hit Count	Action
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OK Cancel

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J&P CYCLES

Rich Brecht,
Sr. Call Center Manager



J&P Cycles Overview



- ▶ Established in 1979, Celebrating our 30th year in 09
- ▶ Largest provider of Motorcycle Aftermarket Parts and Accessories in the World
- ▶ Multi-Channel Marketer
 - ▶ Catalog
 - ▶ Retail
 - ▶ Web
 - ▶ Event
- ▶ Best Service in Our Industry
 - ▶ Free Technical Support for Life
 - ▶ 24/7 Customer Service
 - ▶ RNT Portal with E-mail Support, Support Videos, Feedback, Web Chat (recent launch)
 - ▶ Liberal Returns Policy
- ▶ 98% of our Customers Would Refer us to Friends and Family

Voice of the Customer is the Foundation for our Business

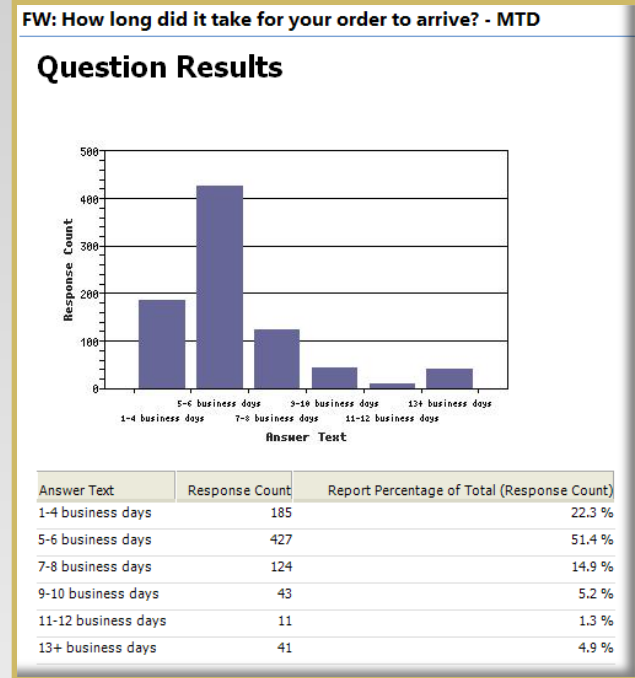


- ▶ 100% of Customer Surveys Processed Through RNT Feedback
 - ▶ Web Survey
 - ▶ On-Line General Survey
 - ▶ Manual Survey Cards
 - ▶ Chat Survey
- ▶ RNT Feedback Adds Value to Every Department in our Organization
 - ▶ Automated Survey Reporting
 - ▶ Participation Trending
 - ▶ Question Trending
 - ▶ Question and Comment Distribution
 - ▶ High Level (Overview)
 - ▶ Departmental Granular

Projecting the Voice of the Customer



- ▶ Indirect Customer Follow Up
 - ▶ E-Commerce (Usability, Functionality)
 - ▶ Purchasing / Merchandising (Quality, Availability)
 - ▶ DC (Shipping, Packaging)
 - ▶ Marketing (Offer Feedback, Catalog Fulfillment)
 - ▶ Showroom (Appearance, Service, Selection)
 - ▶ Call Center (Service, Tech Support)
 - ▶ Sales (Research, Parts Availability, Selection)
- ▶ Direct Customer Follow Up
 - ▶ 100% of Surveys Become Incidents
 - ▶ 100% of Surveys Reviewed
 - ▶ 100% of Surveys Receive a Response
 - ▶ Canned or Custom Response
 - ▶ Phone Call or E-mail



Survey Responses Creates Incidents



091013-000223 - jpcycles - RightNow CRM

Home

Save Save & Close New Refresh Forward Print Reset Password Delete Spell Check Propose New Opportunity Appointment Links Info

Live Media Bar Logout Chat Available Request Chat Cancel Request Connectivity

Queues 091013-000223

Subject* Customer Satisfaction Survey Received

Reference # 091013-000223 Contact* Charles Powell Product Number

Status* Follow Up Organization Name Catalog

Assigned Product General Survey Catalog Page Number

Disposition [No Value] Category [No Value] Exp Cat Source Code

Callback Date No Value Customer Number ##### Order Number

Messages Contacts Details Attachments Tasks (0) Organization Audit Log **Survey** FTC Notifications QA

Open New Print Copy Assign Delete Forward Propose Options

Question Text	Answer Text	Text Answer Value	Email Address	Last Name	First Name
Completed: 10/13/2009 04:33 PM					
Name: Customer Satisfaction Survey - Staff Entered					
Any other comments you would like to make about J&P Cycles?	No Value	YOUR WEBSITE NEED	texaskeeter924@me.com	Powell	Charles
Are you aware our complete J&P Cycles catalog is on the worldwide web with secured online ordering?	Yes	No Value	texaskeeter924@me.com	Powell	Charles
Are you happy with the quality of products you received?	No	No Value	texaskeeter924@me.com	Powell	Charles
Do you order your aftermarket parts from other mail order companies?	Yes	No Value	texaskeeter924@me.com	Powell	Charles
How many days did it take for your complete order to arrive?	5-6 business days	No Value	texaskeeter924@me.com	Powell	Charles
How would you rate the packaging of your parts order?	Average	No Value	texaskeeter924@me.com	Powell	Charles
If no, please tell us why:	No Value	BAD BOYS AIR HORN	texaskeeter924@me.com	Powell	Charles

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SUMMIT 09

Using RightNow Feedback



- ▶ Summary of Benefits
 - ▶ Organization and Distribution of Survey Feedback
 - ▶ Organizational Process Improvement in All Departments
 - ▶ Customer Win Back (Estimated 5-10 Customers Saved Per Month)
 - ▶ Cost Reduction (\$50K in annual labor cost reduction)
 - ▶ Increased Sales (Estimated \$100k in Sales, Yr. 1)
- ▶ Future Expansion
 - ▶ API Integration
 - ▶ Customized Marketing Strategy
 - ▶ Survey Question Rebuild

RightNow Feedback Forums

*Deep dive into a
few forum posts*

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Form Support (from Pivotal Veracity)

Email Client/Platform	Rendered?	Functional?	Details
AOL.com	√		
AOL 9	√	√ *	* Allowed but warns the user that the link has been disabled. This is significant because it is reading the form submit button as a link, or is making no differentiation. Once you enable links, it opens in the AOL browser and takes you to the appropriate resulting page.
AT&T	√		
BlackBerry IS 1.x	n/a	n/a	No HTML support
BlackBerry IS 2.x/ ES	n/a	n/a	No HTML formatting support
BT	√	√	
Comcast	√	√	
Earthlink	√	√	
GMAIL	√	√ *	* Allows you to access/send information via a form in the email but warns the user when the submit button is clicked.
Hotmail / WLM	√		
IPhone	√	√	
Lotus Notes	√	√	
MAC	√		
Netzero/Juno	√		
Outlook 2003	√	√	
Outlook 2007			
Outlook Express	√	√ *	* Allows you to access/send information via a form in the email but warns the user when the submit button is clicked.
Outlook XP	√	√ *	* Allows you to access/send information via a form in the email but warns the user when the submit button is clicked.
Thunderbird	√	√	
Windows Mobile 6	√		
Yahoo! Classic	√	√	
Yahoo! Mail	√	√	

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QUESTIONS?

