

RIGHT
NOW[®]




S U M M I T 0 9

RIGHTNOW CTI SOLUTIONS

Stephen Michael

Director of Product Management

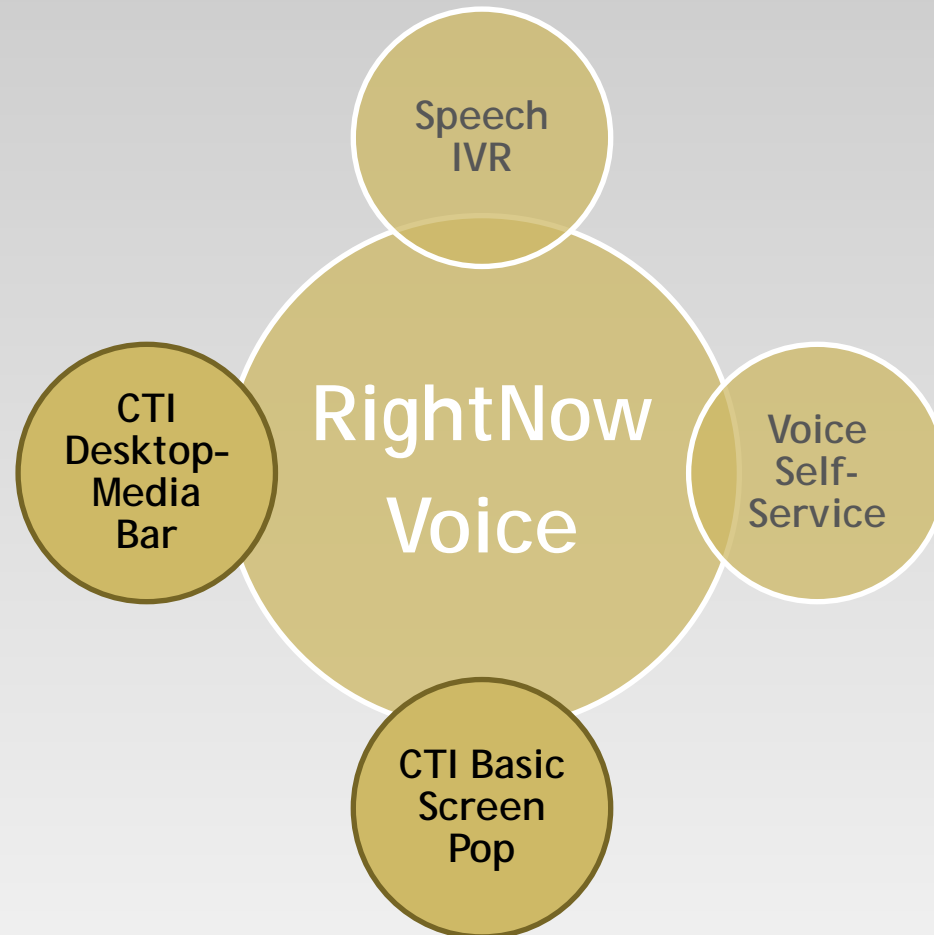


The Voice Contact Center

- ▶ Broad solution-set that adds Voice capabilities to the RightNow CRM foundation
- ▶ Voice Capabilities Include:
 - RightNow Interactive Voice Response (IVR)
 - *Suite of telephone-based self-service solutions to automate, route, and deliver superior caller experience*
 - RightNow Computer Telephony Integration (CTI)
 - *Solutions to reduce call duration using screen pop and simplify agent experience thru embedded call control*

RightNow CTI

- ▶ A key element of the Voice-Enabled Contact Center
 - *Includes options for both simple and comprehensive integration*



Telephony Integration Options

CTI Basic Screen Pop

- Pop or Open Existing Incidents, Contacts, etc.
- No Passing of IVR Data to Desktop
- 3rd-party Workstation Softphone Generates the Screen Pop Request

Comprehensive Partner-enabled

- Embedded Call Control in RightNow Desktop
- Pass IVR Data into RightNow Desktop
- Desktop Integration Add-In Framework (.NET)
- Ability to Trigger Workspace Rules, Scripts and Guided Assistance

Summary Attributes

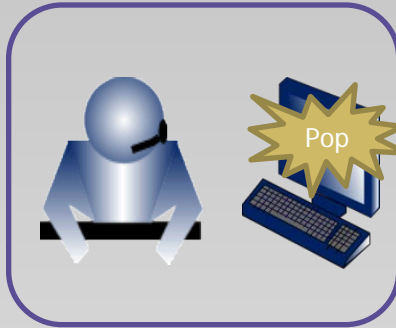
- Easy to implement
- Low cost from RightNow
- Moderate value

- Highest functionality
- Best agent productivity
- Moderate cost

CTI “Basic” Examples



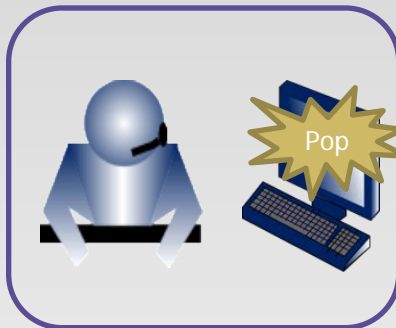
Caller ID (ANI)



Contact record automatically “pops” or opens at call arrival



Incident #



Incident automatically “pops” or opens at call arrival

- Integrate telephony platform with RightNow Agent Desktop
- Support of a few popular premise and on demand telephony solutions
- Screen pop as calls arrive to greet callers and reduce handle time

CTI "Basic" Screen Pop

► What?

- Ability to pop only a contact, incident, opportunity, or custom data report *but no embedded call control.*

► How?

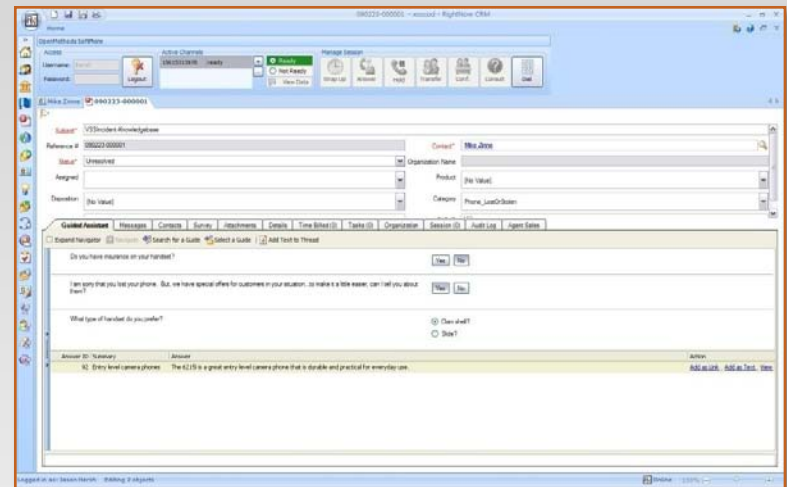
- HTTP GET (URL) function generated, using local host, on the RightNow desktop
- Requires 3rd-party softphone (or client) capable of generating URL & params
- Requires discovery to assess customer compatibility & implementation

► Pros

- Simple, fast and low additional cost
- Potential support for range of telephony vendors
- Multiple reference implementations

► Cons

- Screen pop only - No embedded desktop call control
- Fully dependent upon 3rd-party softphone / desktop application
- Customer's telephony/ACD team must provide and provision softphone



Partner Solutions for full CTI / Telephony Integration

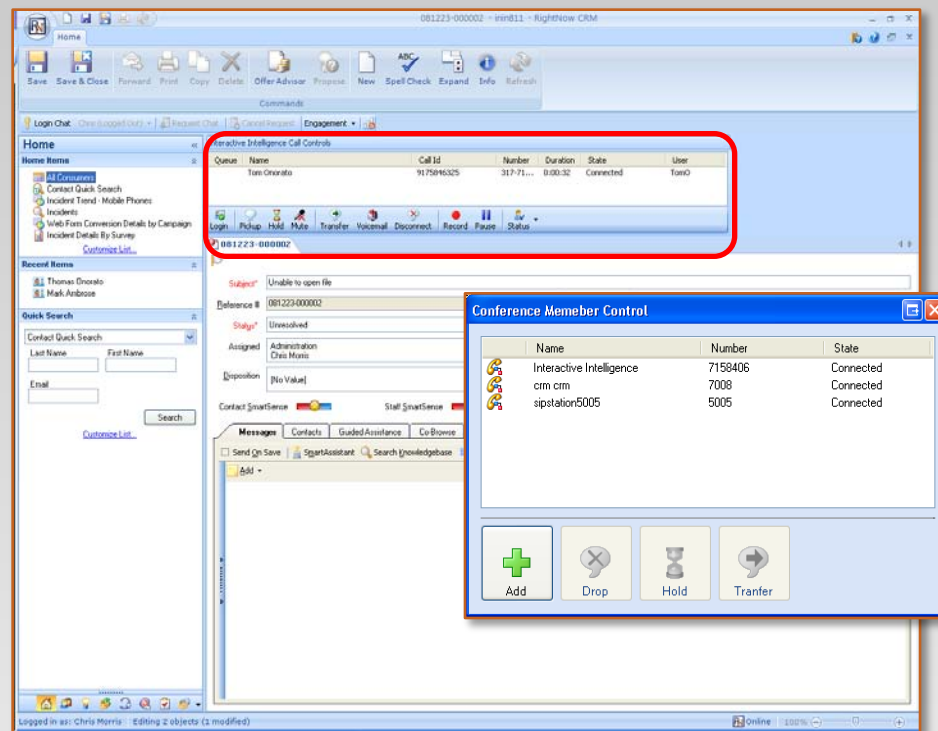
Partners	On Premise (most switches)	On Demand	Outsource Agents	Toolbar in RightNow Desktop
Open Methods	✓	✓ Thru partners		✓
(I3) Interactive Intelligence	✓	✓		✓
Transera	no	✓		future
West	no	✓	✓	✓
Tele-Performance	no	✓	✓	future
TELUS	no	✓		✓
CosmoCom	✓	✓		future
Convergys	n/a	n/a	required	No
inContact <small>(UCN)</small>	no	✓		No

Interactive Intelligence (I3)



Solution

- ▶ Integrated CTI, ACD, UQ, SMS, WorkForce Mgmt, Call Recording, etc.
- ▶ Common .NET platform - using RightNow Connect / Click-Once
- ▶ On Premise & On Demand





Solution

- ▶ On Demand Integrated CTI, ACD, Universal Queue, SMS, WorkForce Mgmt, Call Recording.
- ▶ Selling Model - sell with or sell thru

Integration Functionality

- ▶ "Mediabar" softphone w/ single sign-on
- ▶ CTI screen pop of contact, case, KB, opportunities - based on IVR data
- ▶ Support for conference and transfers to free-form text entry fields

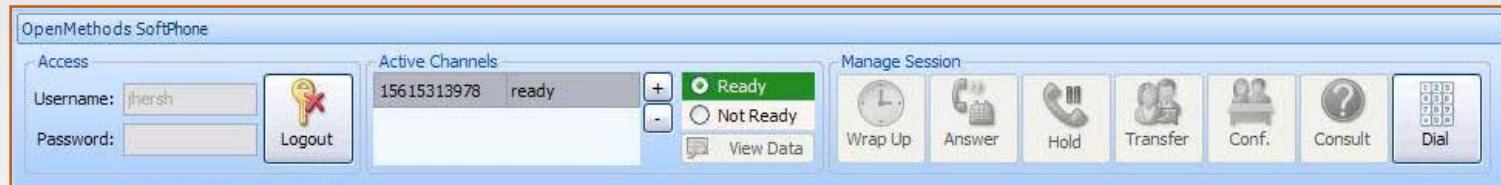
The screenshot shows a CRM application window titled 'Schering-Plough - West WSS - RightNow Customer Service - RightNow CRM'. The interface includes a navigation pane on the left with options like 'Incidents', 'Communication Center', 'Analytics', 'Contacts', 'Opportunities', 'Campaigns', 'Mailings', 'Content Library', and 'Audiences'. The main area displays an 'Agent Management' form titled 'To Create an Agent' for 'Boeing'. The form contains the following fields and controls:

Agent Information for Boeing	
Login	<input type="text"/>
Agent Type	Normal
Password	<input type="password"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Email	<input type="text"/> (Leave blank if not needed)
Phone Number	() -
Online Date	Use Current Date/Time 02/02/2009 11:00
Offline Date	No Offline Date 0:00

OpenMethods



- ▶ Primary on-premise CTI solution for RightNow today
 - Running in production with multiple RightNow customers
- ▶ Designed to be deliverable also as an MSP offering
 - With appropriate partner
- ▶ Integration of the RightNow desktop with 3rd-party telephony solutions
 - Adapts media bar sample to connect to the OpenMethods server
- ▶ Initially provides an adapter to existing Genesys - Became GA February '09
 - Cisco available in late '09, to be followed by Avaya (targeted early 2010)
- ▶ Capabilities
 - Integrated screen pops, call control, routing/queuing, and UQ



OpenMethods .NET Add-in

The screenshot displays the RightNow CRM interface with the OpenMethods SoftPhone 208.11.03 add-in. The interface includes a navigation pane on the left with categories like Administration Items, Home, Audiences, Content Library, Campaigns, Incidents, Surveys, and Analytics. The main area shows the 'Active Channels' section with a table containing a channel ID '15615313978' and a status 'ready'. To the right of the table are control buttons for 'Ready' (green), 'Not Ready' (white), and 'View Data'. Further right is a 'Manage Session' section with buttons for 'Wrap Up', 'Answer', 'Transfer', 'Consult', and 'Hold'. To the far right is an 'Access' section with 'Dial' and 'Logout' buttons. A red circle highlights the 'Ready' and 'Not Ready' buttons, and a speech bubble points to them with the following text:

- Uses the RNOW .NET AddIn framework and RN Connect to integrate to CRM
- Adapts RNOW's sample media bar to interface to the OpenMethods s/w server

TECHNOLOGIES

11

Logged in as: Chuck Miller

RN Online 100%

Computer Telephony Integration

- ▶ **CTI options evaluated** through a strongly recommended detailed onsite consultative discovery session.
- ▶ **Two-day onsite engagement** providing customers with a technical survey to determine the best integrated telephony option for their environment.
- ▶ **Includes a detailed review** of customer requirements and any near term changes to the telephony and network infrastructures.
- ▶ The engagement survey findings are mapped against CTI options and capabilities, resulting in a **recommended solution for the customer.**

RIGHT
NOW[®]



A dark blue silhouette of a mountain range with three peaks of varying heights.
S U M M I T 0 9

UP NEXT

Presentation and demo of the
OpenMethods solution - by
OpenMethods



RightNow Adapter Overview

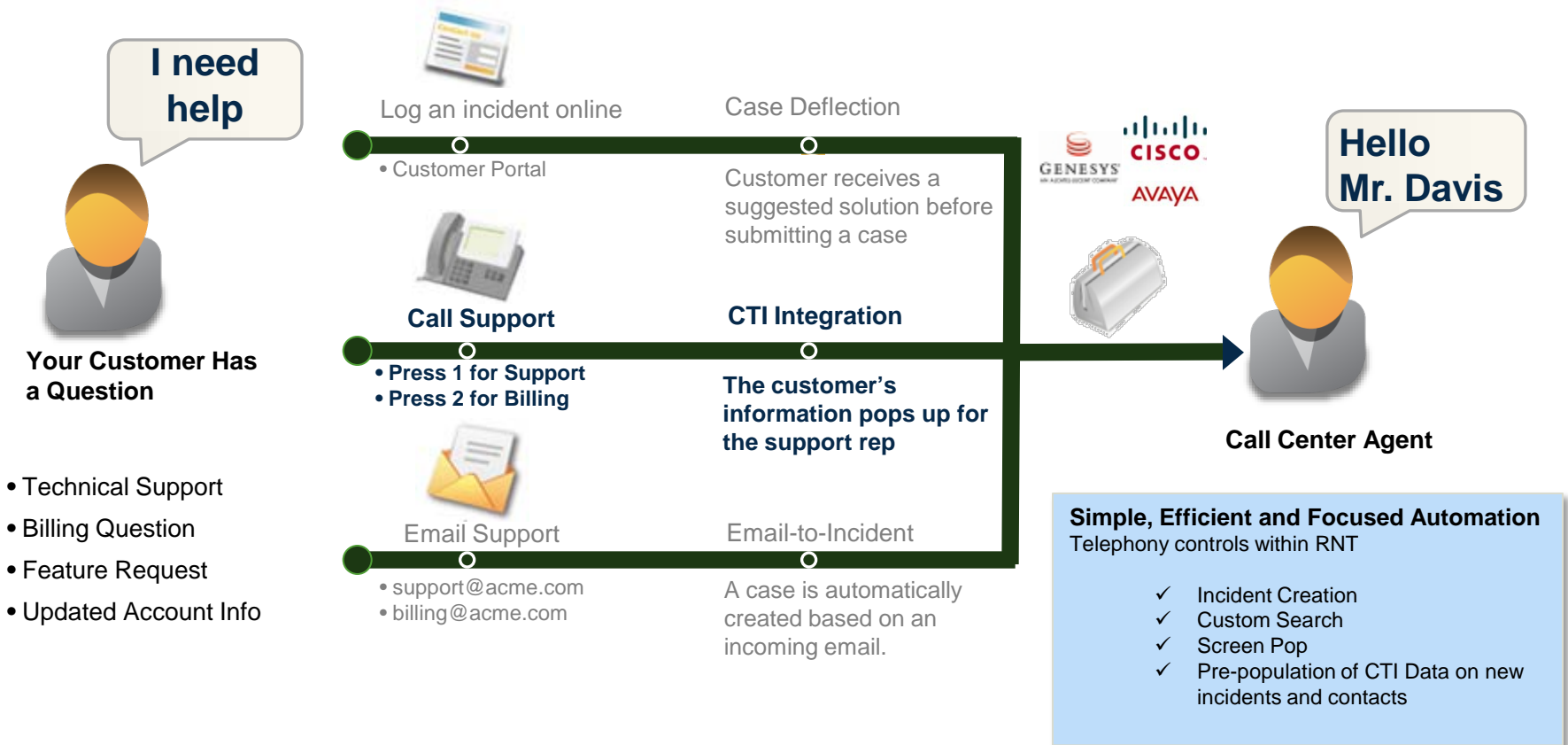
OpenMethods, LLC



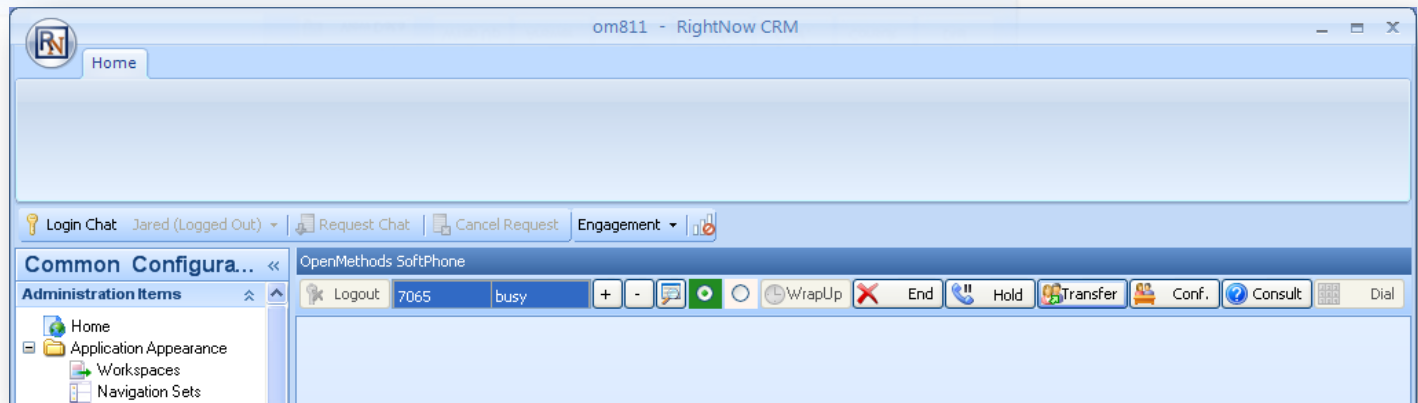
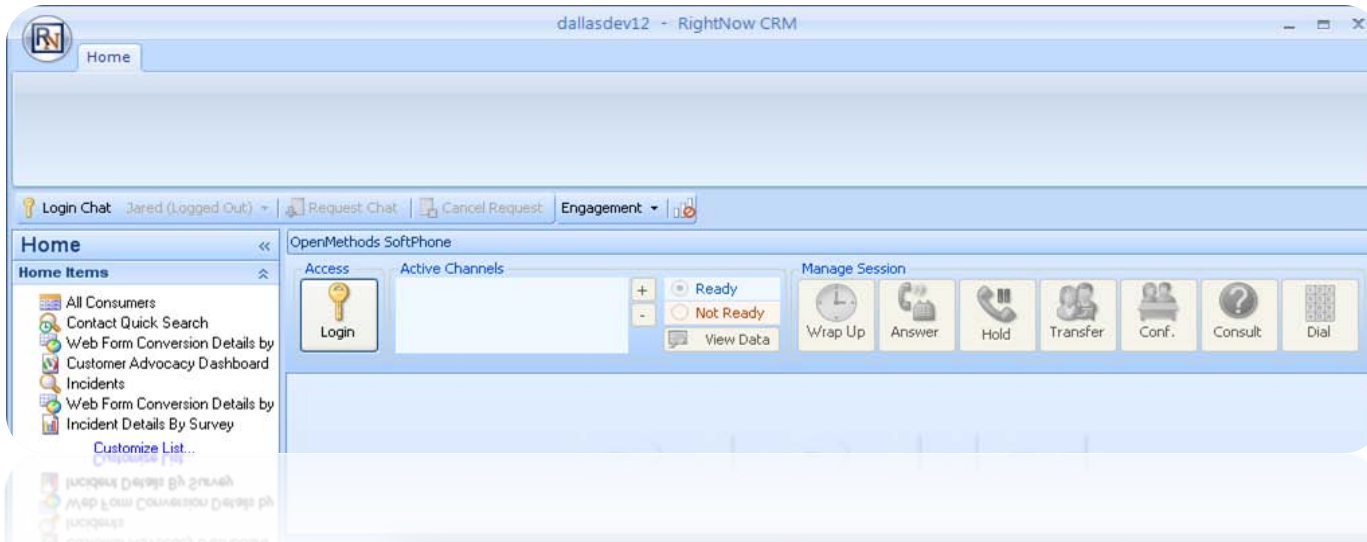
Contact Center Headaches

Problem	Impact
<p>No screen pop within CRM application</p> <p>So what? Agents manually collect information & enter data about caller</p>	<ul style="list-style-type: none"> ▪ Agent labor costs increase with longer talk time ▪ Call costs increase with higher average handle time ▪ Manual steps lowers “one & done” call completion rates
<p>Information about the caller not passed to agent</p> <p>So what? Agents ask customer to repeat information previously provided</p>	<ul style="list-style-type: none"> ▪ Customers become annoyed: “you don’t know who I am” <ul style="list-style-type: none"> ✓ Loyalty suffers ✓ Scores less satisfaction on surveys ✓ Escalates to supervisors more frequently ▪ Agents manually re-enter data from the other apps to CRM <ul style="list-style-type: none"> ✓ Lowers quality and consistency of CRM data ✓ Decreases agent performance
<p>Separate softphone & CRM apps create “clutter”</p> <p>So what? Context switching increases potential for human error</p>	<ul style="list-style-type: none"> ▪ Too many “active apps” increases agent training overhead ▪ Agents become more easily confused and blame the system ▪ Wrong steps lead to wrong agent behavior
<p>Agent performance metrics are impacted</p> <p>So what? Agent talk time and callwrap-up time increase from inefficiency</p>	<ul style="list-style-type: none"> ▪ Agents have higher occupancy & are less productive ▪ Multiple call-types compound problem across agent pool

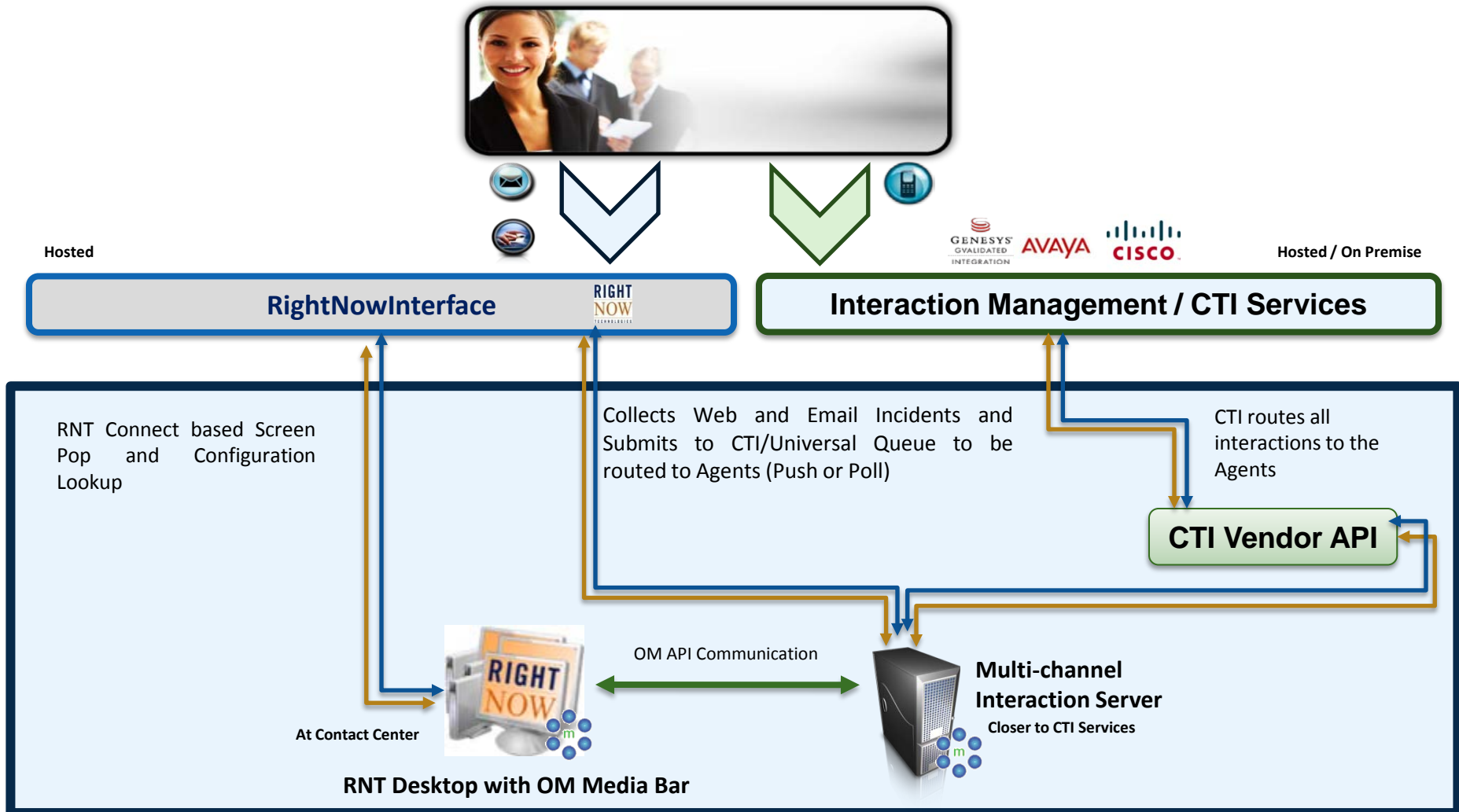
Customer Touch Points



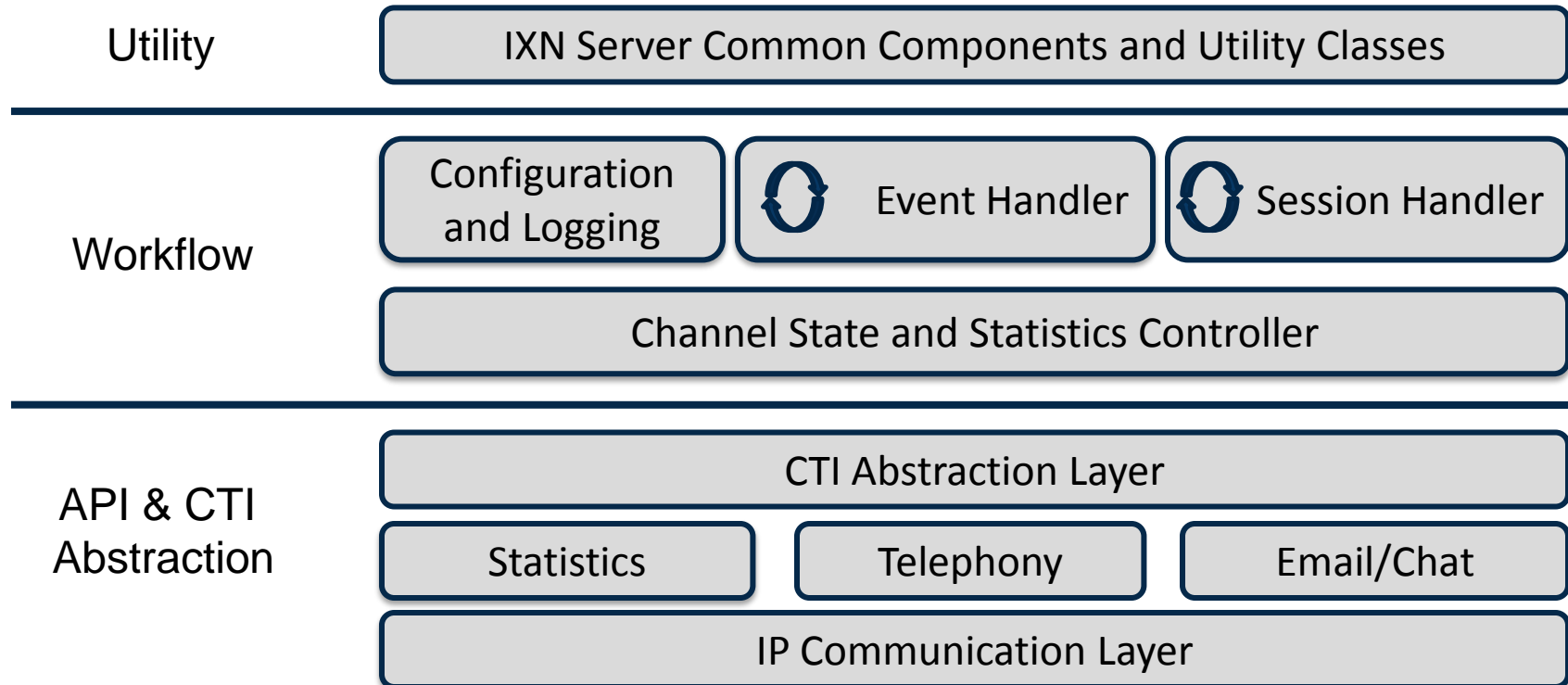
Media Bar – Docking and Re-Sizing



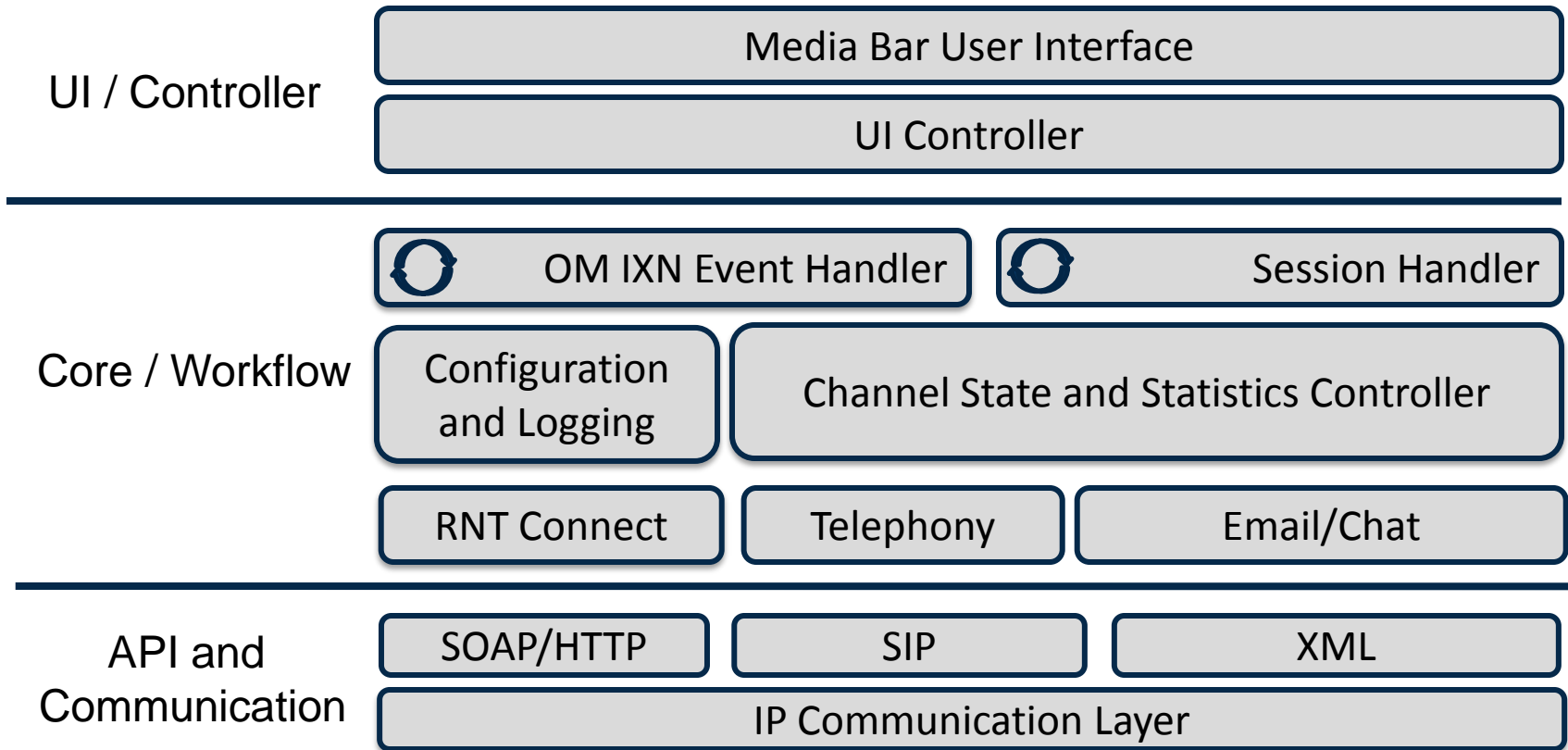
High Level Architecture



Interaction Server



Softphone Media Bar



Supported Features

◆ Call Control

- Answer / Disconnect
- Hold / Retrieve
- Transfer and Conference
 - Single Step/Blind/Mute/Two-Step
 - Transfer a Conference
 - Drop from a Conference
- Consult / Alternate
- Dial (with configurable Speed Dial)

◆ Agent State Control

- Login/Logout
- Ready / Not Ready w/Reason Codes
- ACW (Timed, Manual, CTI Initiated)
- View CTI Data

◆ Screen Pop

- Configurable based on CTI Data and other rules
- Pop search reports with filters
- Pop incident and contact (new or existing)

◆ Other

- Multi-Channel
- Single Sign-On
- Scalability over multiple servers
- Fault Tolerance (N+1, N+X, 2N)
- Configurable logging
- CTI Support
 - Genesys (AIL)
- Ability to enable and disable features
- Dock-able Media Bar within RNT Desktop

Further Improvements

Q4 2009

Support for Cisco

Scalability and Performance Enhancements

Modify/Add CTI Data

Q1 2010

Support for Avaya

Simultaneous support for Multiple CTI

Conference Management Interface

Dynamic Resizing of Media Bar

Send DTMF

Agent Scripting via RNT

Q2-Q4 2010

Configurable Screen Pop Workflow

Configurable States and State Transition

Pre-Population of new Incident and Contacts from CTI Data

- ◆ Simplifies agent workflow with fewer open applications windows
 - Using accessible telephony controls within CRM requires fewer keystrokes
 - Minimizes desktop clutter
 - Lowers agent training requirements
- ◆ Eliminates call/IVR manual data entry errors
 - Uses customized screen pop to deliver pre-populated fields with relevant call/IVR data
 - Uses repeat caller data to access historical incident or case information
- ◆ Enables agent performance consistency by reducing manual steps
 - Lowers talk time and call-wrap up data entry time
 - Improves accuracy of occupancy utilization rates
- ◆ Improves quality of customer historical data
 - Integrates call patterns and caller behavior with CRM data
- ◆ Creates a lasting first impression for customers
 - Call/IVR data populating CRM fields allows agent to greet callers by name
 - Callers immediately experience “you know who I am and what I want to do”

What do we need to know?

- ◆ CTI and IVR
 - Software and Hardware Versions of PBX and CTI
 - CTI Data being used today
 - Call Types and Rules

- ◆ Screen Pop Rules
 - Incident ID based Screen Pop
 - Failure and recovery scenarios
 - Pre-population of data?
 - Other fields in the report
 - What happens if search fails?

- ◆ Contact Center
 - Topology
 - Hardware and Software Sizing (Agent Pool, Call Volumes)
 - Fault Tolerance and Redundancy Requirements
 - Single or Multi-Site

Implementation Tasks

- ◆ Requirements Analysis
 - Scope of project and systems requirements
 - Environment Access and Architecture Documentation
- ◆ Implementation
 - Server Implementation
 - Installation / Configuration and Integration to CTI
 - Client Add-In
 - Screen pop and automation
 - Deployment through RNT Interface
- ◆ Testing
 - Unit Testing of individual modules
 - Integration Testing with CTI
 - End-to-End System Testing of the solution
 - Support for UAT
- ◆ Documentation and PM
 - Project Documentation
 - Run Book
 - Softphone User Guide
 - Project Management

RIGHT
NOW[®]



A dark blue silhouette of a mountain peak with a sharp central peak and sloping sides.
S U M M I T 0 9

THANK YOU!



RIGHT
NOW[®]



A dark blue silhouette of a mountain peak with a sharp central peak and sloping sides.
S U M M I T 0 9

QUESTIONS?

