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**CUSTOMER EXPERIENCE BEST
PRACTICES: RIGHTNOW SALES**
Demi Carstens-Professional Services
Susie Boyer-Product Management



Agenda

- ▶ Overview RightNow Sales
- ▶ Becker Professional Customer Showcase
- ▶ Demo of RightNow Sales
- ▶ Questions

"The pessimist finds the difficulty in the opportunity. The optimist finds the opportunity in the difficulty."

- *Winston Churchill*

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Seasons of Change

- ▶ When market conditions change, your strategies need to change as well
- ▶ Everyone forced to do more with less
- ▶ Both B2B & B2C sales are experiencing shifts in with the popularity of social media

Sales Dilemma: How do you?

Deliver a Differentiated Customer Experience

- ▶ Knowledgeable engagements
- ▶ Build profitable relationships
- ▶ Tailored solution

While

Controlling or Reducing Costs?

- ▶ Improved sales productivity
- ▶ Better lead conversion
- ▶ Repeatable success

Today's Sales Challenges

Business

- More educated buyers with more choices
- Low sales productivity
- Lack of end-to-end customer/prospect insight
- Poor forecasting visibility

Technology

- Spreadsheets
- Poor reporting
- Non-intuitive sales application
- Multiple customer/prospect repositories
- Incomplete customer data

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BEST PRACTICES



RightNow Sales Best Practices

1. Ensure user adoption
2. Minimize data required/presented
3. Get management support
4. Share data across organizations
5. Don't try to replicate what your old system used to do
6. Review and update your sales process often

Ensure User Adoption

If they don't want to use it, they probably won't.





Minimize Data Required/Presented

Get Management Support



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Share Data Across Organizations



Don't try to replicate what your old system used to do

Analyze before you choose a direction



Review and update your sales process often

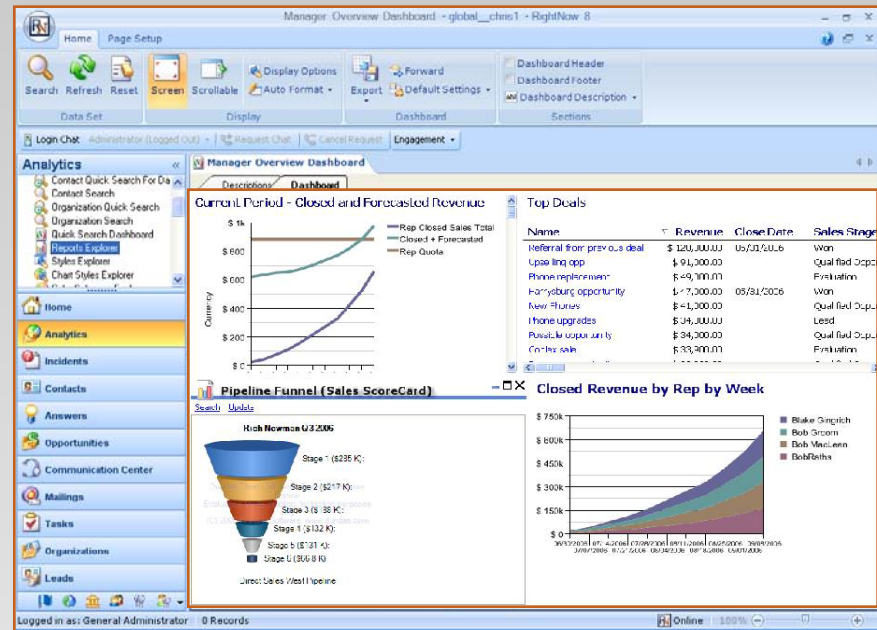


Final Best Practice Thoughts

- ▶ Use agent desktop workflow
- ▶ Use add-ins
- ▶ Contextual workspaces
- ▶ RightNow Analytics to constantly measure key successes
- ▶ RightNow Enterprise Analytics - combine CRM with data from other systems to measure Return on Sales Expense (RoSE)

Sales Analytics and Dashboards

- ▶ Access actionable knowledge and best practices with role-based dashboards and reports
 - Forecasted and closed revenue by week
 - Opportunity aging analysis
 - Historical trending
 - Won/lost deals by week
 - Monthly quota attainment
- ▶ Easily tailor reports with the Report Design Center
 - Drag-and-drop creation
- ▶ Remember - Reports are not only for management!
- ▶ Schedule reports to sales reps





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CUSTOMER SHOWCASE: DEBUNKING THE SFA MYTH

Sarah Blocker

**Systems Analyst, Becker Professional
Education**



The world is flat...

**...the principles of alchemy will certainly
turn lead to gold...**

The sun orbits the Earth...

**We don't need a sales tool in our
organization...**

The Facts

- ▶ 40K students annually
- ▶ 300 RightNow Users/120 Use Sales
- ▶ 2005: Call Center Begins Using Sales
- ▶ 2008: Regional Sales Mgrs pilot B2B SFA
- ▶ 2009: Remaining Sales Force launch B2B SFA

BPE Sales Channels

B2C

1:1

- Prospective Student to CSR

1:Many

- Lead Generation

Relationships

- Post-sale Support

Traditional Sales

- Contractual Agreement

B2B

HAVE
silos

NEED

HOW

operations insight

anecdotal

TO

BRIDGE

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USING RIGHTNOW CRM

Roll Out

- ▶ Identified stakeholders and SMEs
- ▶ Reviewed requirements/expectations
- ▶ Designed technology around input
- ▶ Returned to stakeholders/SMEs for UAT
- ▶ Developed/delivered training
- ▶ Set a firm go-live date (phased)
- ▶ Provided post-launch follow up/support

Implementation Lifecycle



Successes

- Transparency of information (increased communication!)
- Measureable outcomes (numbers!)
- Metrics (quantifiable vs. anecdotal performance!)

Lessons Learned

- Engage managers and leaders early and often
- Process before technology
- Usage: What's in it for me?

Where do we go from here?

Implementation Lifecycle:

✓Gather Information

Analyze

Evaluate

Improve

Version 2.0

Integration with Order Mgmt

Social Media

Measuring quality



What Myth Will YOU Debunk?

The Power of RightNow Sales

*Demo of how
RightNow uses
RightNow Sales*

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QUESTIONS?



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