

RIGHT
NOW[®]



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

**DESIGN SEAMLESS
EXPERIENCES: DESKTOP
WORKFLOW 101**

Chris Hamilton

Director, Product Management



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
- ▶ What is Desktop Workflow?
- ▶ When is it useful?
- ▶ Workflow Designer Overview
 - Getting started with the designer
 - Deployment
 - Designer principles
- ▶ 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)

Desktop Workflow

Description:

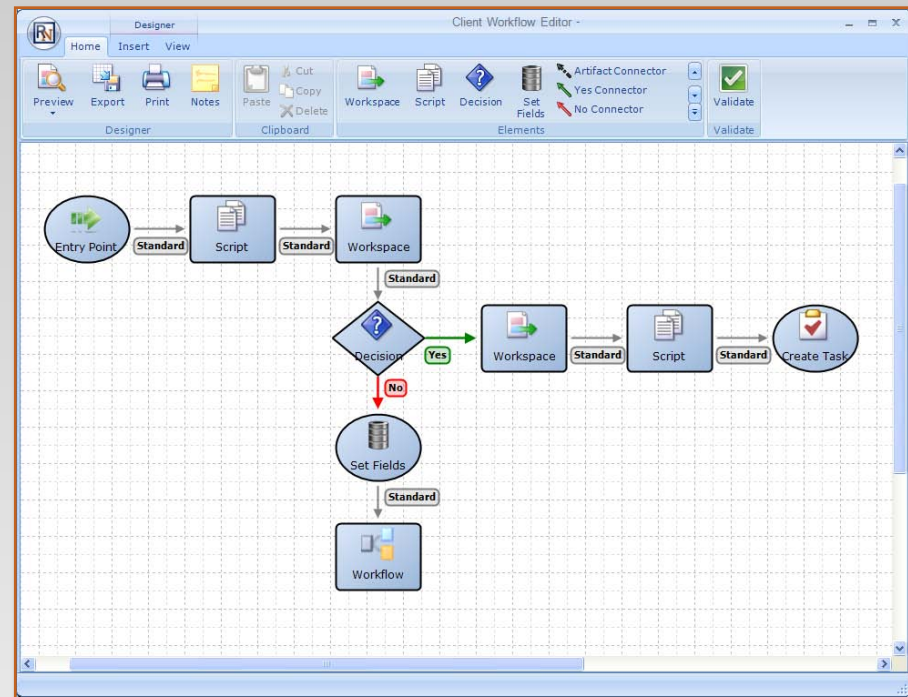
Ability to step an agent through a business process and automate tasks behind the scenes

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 a lot 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

RIGHT
NOW[®]




S U M M I T 0 9

WORKFLOW DESIGNER OVERVIEW



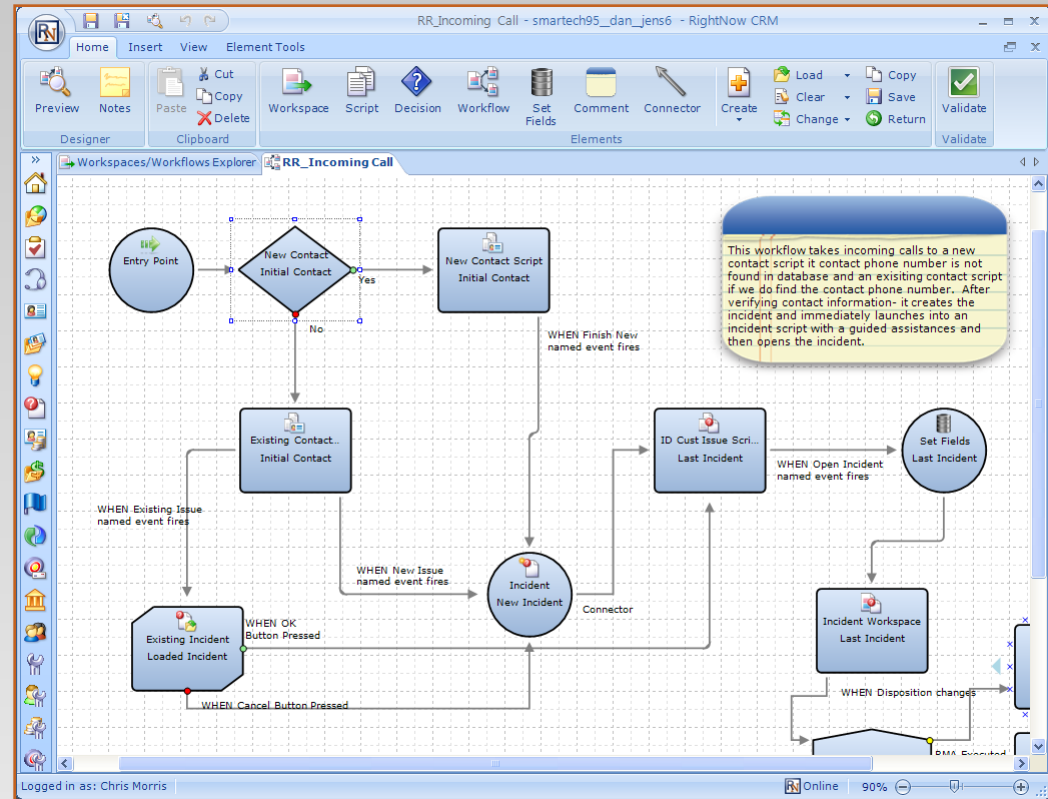
Workflow Designer Overview

Description:

- ▶ New easy-to-use Workflow Designer
- ▶ Visio-style, drag-and-drop designer: simply drag elements onto the canvas
- ▶ Leverage snap-to-grid for ease of layout
- ▶ Define element properties and use connectors to add objects to a flow
- ▶ Contextual ribbon toolbar changes depending on what is selected
- ▶ Preview and validate flows directly within the designer

Key Benefits:

- ▶ Ease of use enables business users to create workflows
- ▶ Edit scripts and workspaces directly without needing to switch to a different designer
- ▶ Embedded workflows and reuse of elements enables highly manageable workflows to support many scenarios



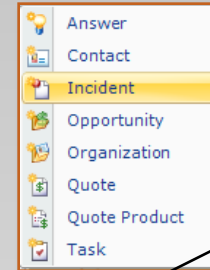
Workflow Designer UI

Multi-select elements and cut/copy/delete

Add elements simply by dragging and dropping onto the canvas

Embed other workflows within a flow

Create new records:



Load or change existing records

Preview the workflow during design

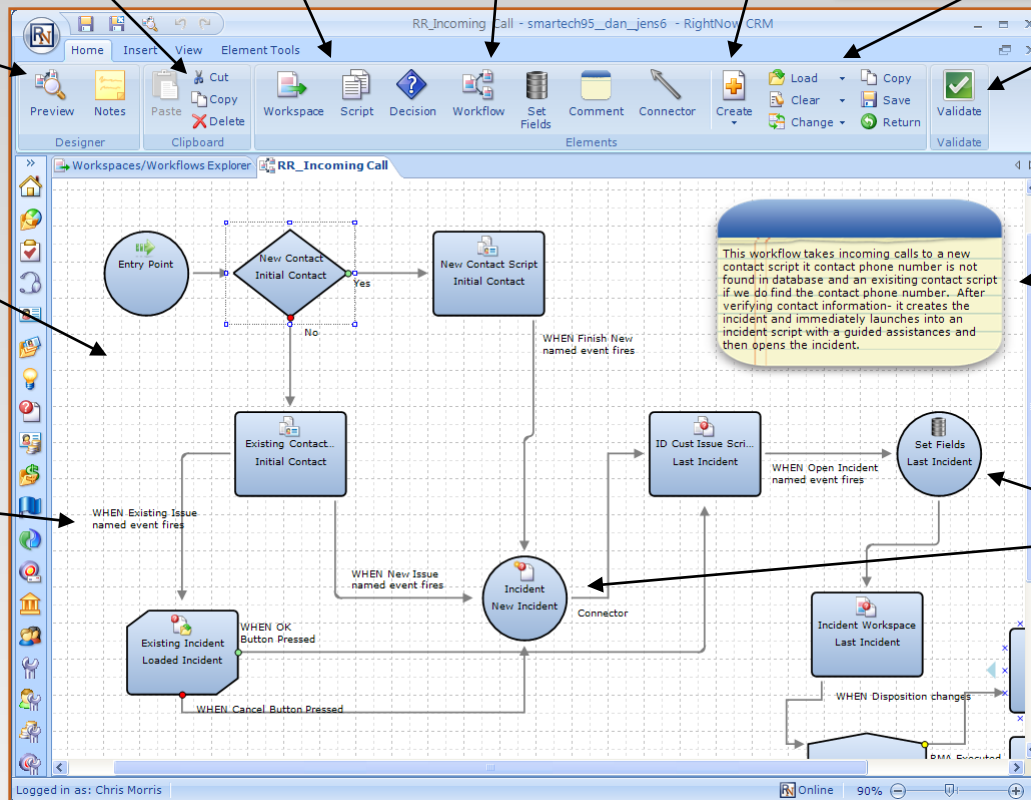
Validate workflows to catch errors

Add canvas grid lines and snap-to-grid for ease of layout


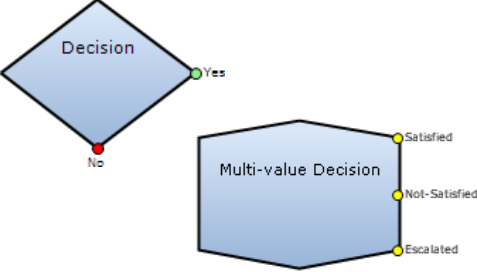

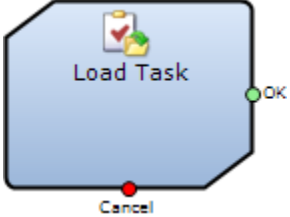
Editable descriptions on connectors clarify the flow

Add comments to tell others about the purpose of the workflow

Round elements designate automation steps: record creation, setting field values

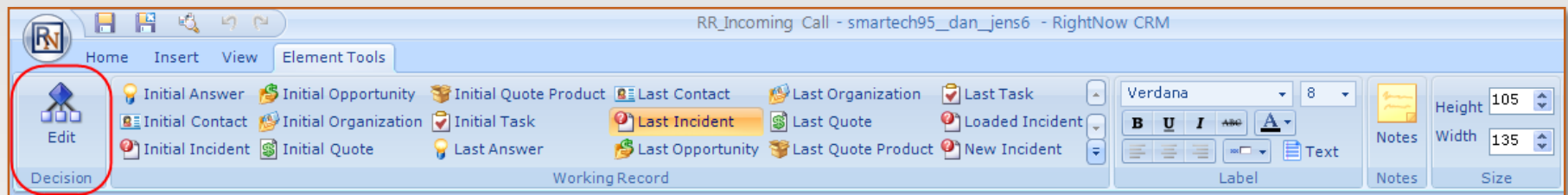
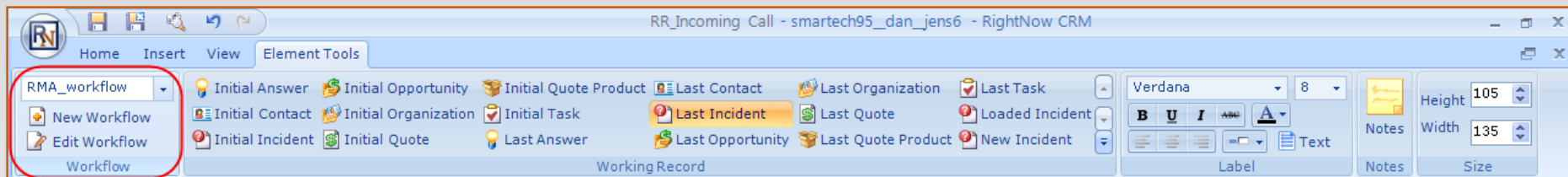


Shape of Elements

Rectangle	Diamond/Hexagon	Round	Rectangle w/ cutoff corners
			
<p>UI element</p>	<p>Decisions</p>	<p>Automation elements</p>	<p>Load/Change</p>
<p>Refers to a workspace, script or workflow</p>	<p>Enables the definition of workflow branches</p>	<p>Represents processes that are done in the background such as setting fields or creating a task.</p>	<p>Represents a record load or change such as changing the contact on an incident</p>

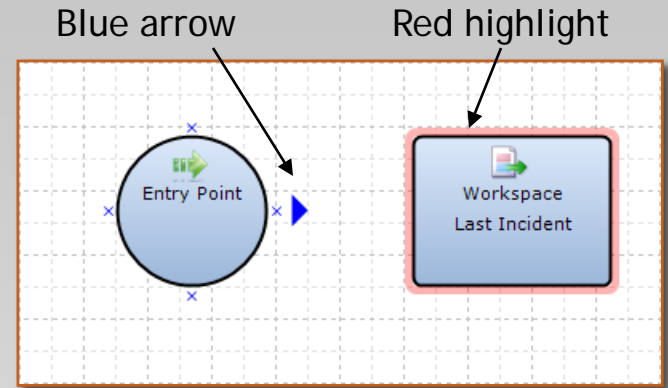
Editing Elements

- ▶ Select the element
 - Double-click to edit decisions, set fields, and create objects
- ▶ The Ribbon Toolbar changes to display element options (different depending on element)

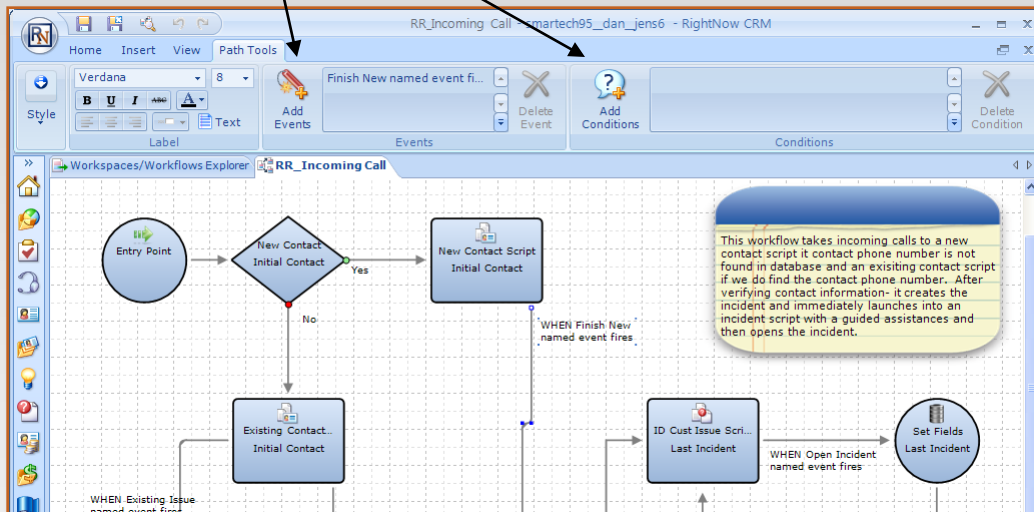


Element Connectors

- ▶ Hover over an object and a blue arrow appears
- ▶ The object highlights in red
- ▶ Click the blue arrow to connect



Add events and conditions to connectors

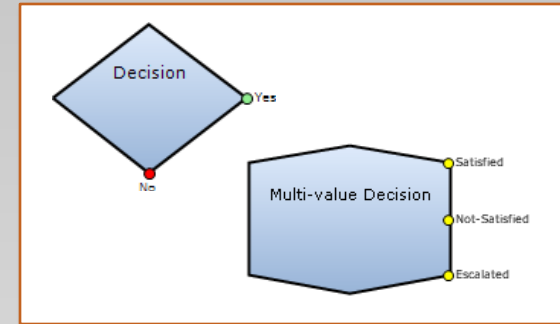


- ▶ Select the connector
- ▶ Ribbon changes to display connector options

Workflow Decision Elements

► Two types of decisions

- Yes/No decisions
- Decisions based on field values



Decision - Initial Contact

Select the type of Decision that you would like to create:

Yes/No Decision

Step 1: Add condition(s) that you want to check.

- [Add](#) The logged in account has a certain value
- [Add](#) The logged in account's profile has a certain value
- [Add](#) A new record is being created
- [Add](#) An existing record is being edited
- [Add](#) A field has a certain value

Step 2: Edit the Decision Description (click an underlined value)

[?](#) Follow the Yes path of this Decision if a new record is being created

[Combine the conditions using a logical expression](#)

Decision on a Field with multiple possible values

Include a value for 'other'

Field: Equals

OK Cancel

Decision - Last Incident

Select the type of Decision that you would like to create:

Yes/No Decision

Step 1: Add condition(s) that you want to check.

- [Add](#) The logged in account has a certain value
- [Add](#) The logged in account's profile has a certain value
- [Add](#) A new record is being created
- [Add](#) An existing record is being edited
- [Add](#) A field has a certain value

Step 2: Edit the Decision Description (click an underlined value)

[Combine the conditions using a logical expression](#)

Decision on a Field with multiple possible values

Include a value for 'other'

Field: Equals

Disposition: Equals

- (Select All)
- No Value
- Satisfied
- No Value
- Customer Satisfied
- RMA Executed
- Not-Satisfied
- Escalated
- Passed to Sales

OK Cancel

RIGHT
NOW[®]




S U M M I T 0 9

**WORKFLOW DESIGNER
DEMO**



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

GETTING STARTED & KEY WORKFLOW PRINCIPLES



Before you begin

► Know the basics:

- Experience with RightNow is required prior to building a workflow.
- Have a good understanding of Profiles, Workspaces, Scripts, Guided Assistance, Workspace rules, Server-side rules

► Draw it out:

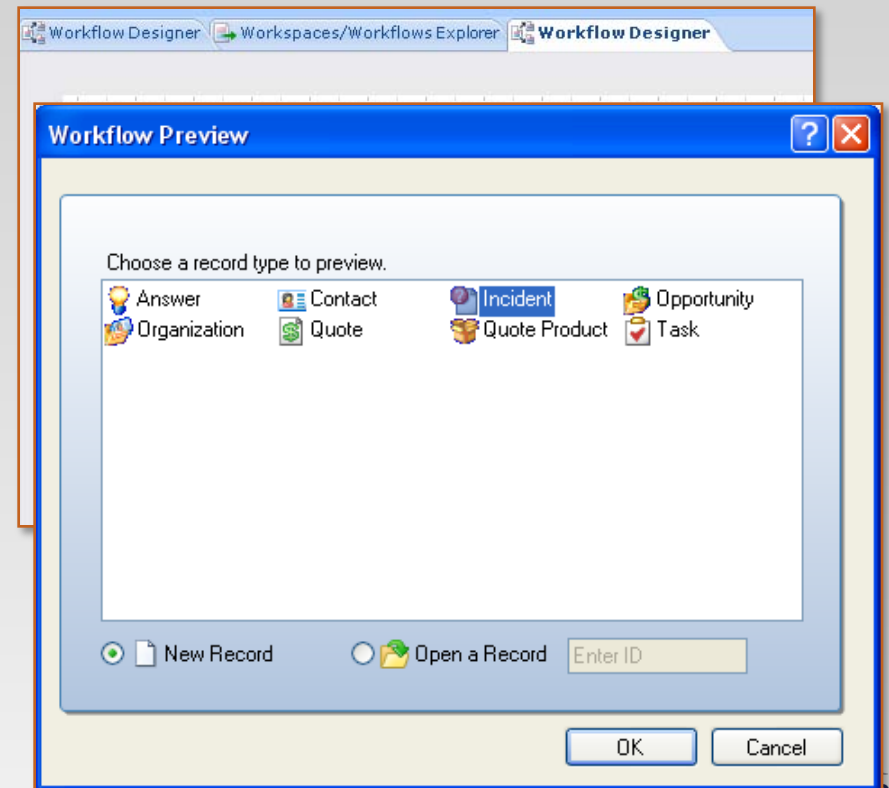
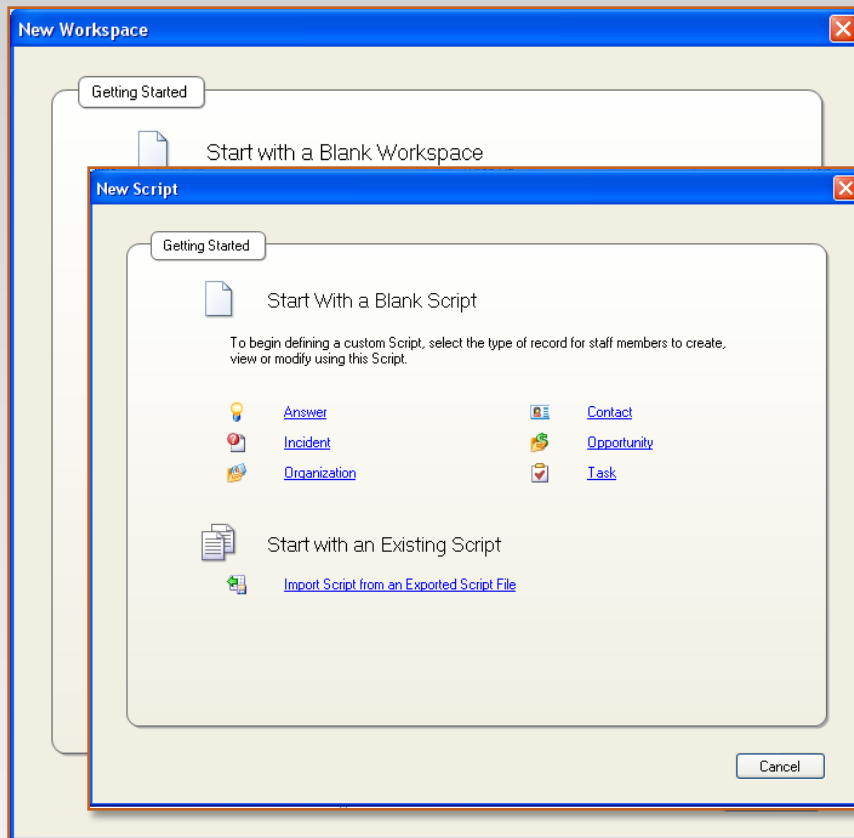
- Make sure you are clear on the business case: state the objectives
- Sketch out a diagram to illustrate the business case and flow
- Don't rush through this! This is often the most difficult part of building a workflow. If you're not clear on the flow now it will be harder once you get into the designer

► Keep it simple:

- Start with a simple workflow and add on
- Think about how the flow could be broken into chunks for re-usability and ease of manageability

Workflows Are Not Object Specific

- ▶ Unlike Workspace and Scripts, Workflows are generic and are not tied to a specific object
- ▶ Workflows may also act on multiple objects



Desktop Workflow - Deployment

- ▶ To deploy a workflow, it must be assigned to an object Editor (i.e. incident, answer, contact, etc.)
- ▶ The assigned workflow will then be used whenever that object type is created or edited

Name: Service Rep

Notes: [Empty]

Common Organizations **Service** Sales Marketing Analytics Feedback Tasks

Incident

- Read
- Add / Edit
- Send Response
- Delete
- Propose

Answer

- Add / Edit
- Delete
- Set to Public Status

Assignment

Incident Queues

[Dropdown] Add

Tier I [X] [Up] [Down]

Pull Policy: Manual

Pull Quantity: 1 (1-99)

Inbox Limit: 1 (1-99)

Workspaces/Workflows

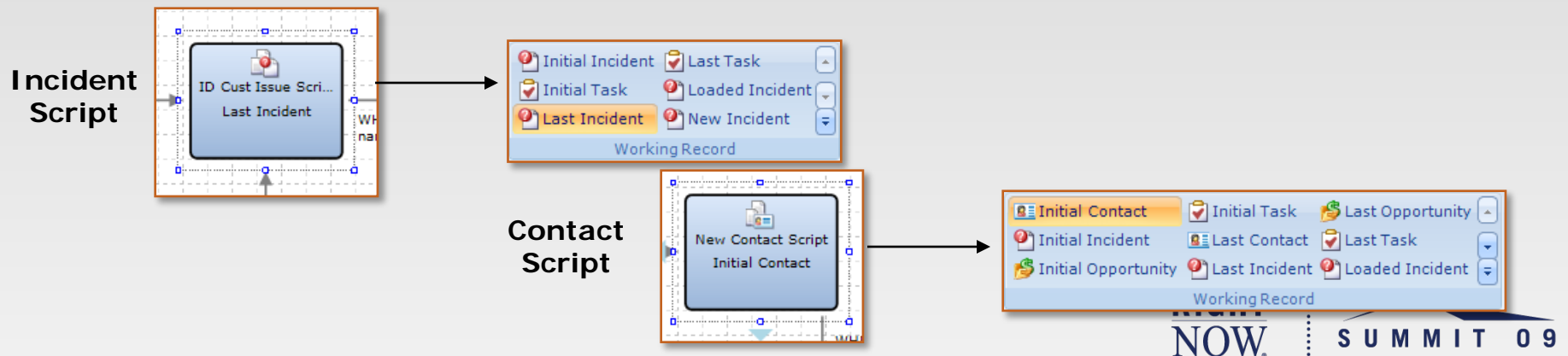
Interface	Editor	Workspace/Workflow
j98	Incident	My new Workflow
	Multi Incident	Incident Multi Edit
	Answer	Answer
	Multi Answer	Answer Multi Edit

Save Cancel



Record Management: Working Records

- ▶ Workflow provides a mechanism to determine which record is being acted upon at any point during the flow
- ▶ That record is called the Working Record
- ▶ There are 3 types of Working Records:
 - Initial: The first record loaded in the workflow
 - Last: The last record loaded by that point in the workflow
 - Named: A specific record is loaded
- ▶ The record types available in the Ribbon Toolbar will change depending on the element selected:



Where does the logic go?

- ▶ There are multiple places to put logic in a workflow
 - In a decision point
 - In a connector
 - Inside an element like a Workspace or Script
- ▶ The best place for the logic will depend on the business case as well as the importance of manageability and re-usability

Key Points to Remember

1. Sketch out the business case first
2. Workflows are generic BUT start from an object
3. When editing elements remember to look for options in the Ribbon Toolbar
4. Remember the shape of elements: Round vs. Diamond/ Hexagon vs. Rectangle vs. Angled Corners
5. Understand the concept of working records
6. Think through where to put the logic when there may be more than one place to do it: workspaces vs. scripting vs. workflows

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?

