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

## **TUNE-UPS IN ACTION**

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**Solution Center Leads**



# Agenda

- ▶ Evaluating Your Site
- ▶ Knowledge Base Optimization
- ▶ Agent Desktop Optimization
- ▶ General Recommendations

# 8 Steps to a Great Customer Experience

- ▶ Establish a Knowledge Foundation
- ▶ Empower the Customer
- ▶ Empower the Employee
- ▶ Offer Multi-Channel Support
- ▶ Listen to the Customer
- ▶ Design Seamless Experiences
- ▶ Be Proactive
- ▶ Measure & Improve Continuously

# Evaluating Your Site

- ▶ How is RightNow used on a daily basis?
  - Shadow each role to gain perspective on how people interact with RightNow to do their jobs
  - Identify any gaps in process
- ▶ What areas can be identified as the pain points?
- ▶ How does RightNow fit with your organization's goals and objectives?
- ▶ How are you ensuring your success and investment with RightNow?
- ▶ Can we leverage RightNow in any way to align with these goals and objectives?
- ▶ Are there opportunities to take advantage of existing or future functionality?

# Knowledge Base Optimization

## ▶ End-User Experience

- Naming the link to your RightNow knowledge base
- Answer content
- Linking to pre-populated list of answers
- Answer relationships

## ▶ Knowledge Base Management

- Analytics
- Answer management process
- Keywords best practices
- Answer links

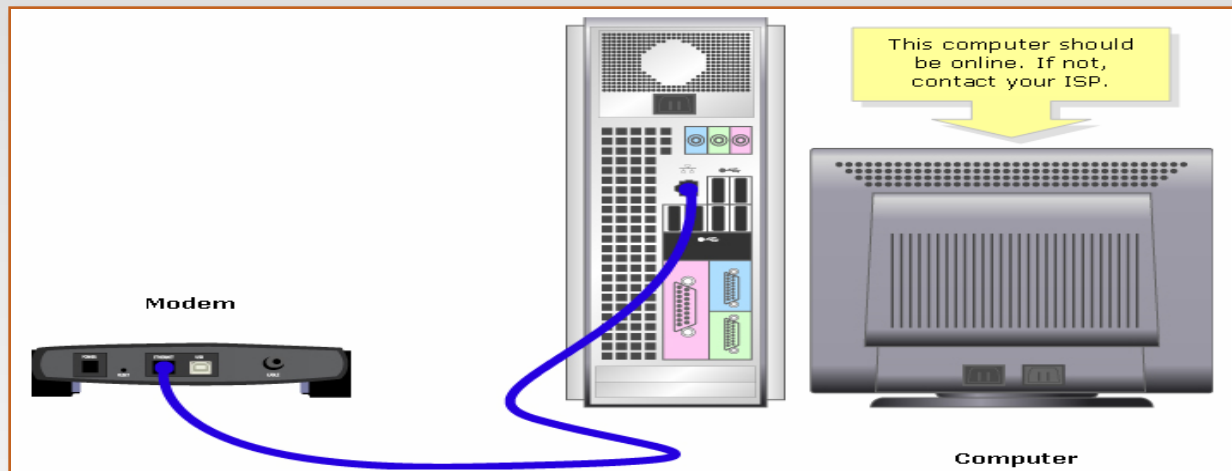
# Knowledge Base Optimization

- ▶ Naming the link to your RightNow knowledge base
  - Be consistent throughout the site
    - Don't name it "Support" in one spot then "Answers" in another
  - Location
    - Should be consistent
    - Top of the page is best
    - Make sure it is on every page in the same spot named the same thing
  - Avoid using "FAQ". Some good suggestions are:
    - Customer Care, Support, Online Help, Customer Support

# Knowledge Base Optimization

## ► Answer Content

- Use a consistent template for font size, style, and color so every answer has the same style and can be read easily
- Use a consistent template for numbering and/or bullet points
- If you find yourself writing a paragraph, STOP. Break the content into bullet points for easy consumption
- Pictures are worth more than 1000 words



# Knowledge Base Optimization

## ► Analytics

- Keyword Search Report
- Answers Last Access Time
- Answers Viewed by Answer
- Service Summary
- Questions Avoided
- Information Gaps
- Session Activity
- Incidents Created by Source - Feedback on Answers

# Knowledge Base Optimization

- ▶ Answer Management Process
  - Proposed Answers
  - Reviewing Answers
  - Publishing Answers
  - Archiving Answers

# Knowledge Base Optimization

## ► Keywords Best Practices

- Use keywords with caution
- Create keywords for synonyms, acronyms, and additional terminology that end-users may use
- Separate keywords or phrases with a comma
- Word Stemming
- Aliasing

# Knowledge Base Optimization

## ► Answer Links

- Manually Related Answers
- Learned Links
- Answer Links
- Validating Links

# Knowledge Base Optimization

## ► Manually Related Answers and Learned Links

The screenshot displays a web interface for knowledge base optimization, specifically the 'Relationships' tab. It features three distinct sections, each with a table header and a message indicating no items are currently shown:

- Sibling Answers:** Includes a toolbar with 'Add', 'Open', 'Print', 'Remove', and 'Preview' icons. The table header has columns for Answer ID, Summary, Language, Status, Assigned, Date Updated, and Action.
- Manually Related Answers:** Includes a toolbar with 'Add Existing', 'Open', 'Print', 'Remove', and 'Preview' icons. The table header has columns for Answer ID, Summary, and Action.
- Learned Links:** Includes a toolbar with 'Open', 'Print', 'Preview', 'Promote', and 'Block/Unblock' icons. The table header has columns for Answer ID, Summary, Blocked, and Action.

Each section also includes an 'Options' dropdown menu in the top right corner. The 'Manually Related Answers' and 'Learned Links' sections are highlighted with red boxes in the original image.

# Knowledge Base Optimization

## ► Answer Links and Validating Links

The screenshot displays a software interface for managing a knowledge base. The top navigation bar includes a 'Home' tab and a ribbon with buttons for 'Save & Close', 'New', 'Refresh', 'Preview', 'Check Links' (highlighted with a red box), 'Print', 'Copy', 'Delete', 'Spell Check', 'Links', and 'Info'. Below the ribbon, the 'New Answer' form is visible, featuring a 'Summary' text area, a 'Status' dropdown set to 'Private', a 'Language' dropdown set to 'English (US)', an 'Assigned' dropdown set to 'RNT Tiffany Larson', and an 'Access Level' dropdown set to 'Everyone'. The 'Content' section includes tabs for 'Products/Categories', 'Tasks (0)', 'Details', 'Attachments', 'Audit Log', and 'Relationships', along with 'Keywords' and 'Notes' input fields. The 'Answer Type' section has radio buttons for 'HTML' (selected), 'URL', and 'File Attachment'. The 'Question' section is set to 'Answer' and includes a 'Quick Preview' tab. A rich text editor toolbar is present with options for font face ('Times New Roman'), size ('12 pt'), and bold/italic/underline. A 'Toolbox' on the left side of the editor contains an 'Insert Answer Link' button (highlighted with a red box) and other options like 'Conditional Section', 'Search KnowledgeBase', and 'Smart Merge'.

# Agent Desktop Optimization

- ▶ Workspace Design
- ▶ Standard Text
- ▶ Internal KB
- ▶ Agent Guided Assistance (August '08)
- ▶ Agent Scripting (November '08)

# Agent Desktop Optimization

## ► Workspace Design

- Create workspace rules to streamline processes
- Use custom tabs to display browsers or custom reports
- Ensures the right people see the right information

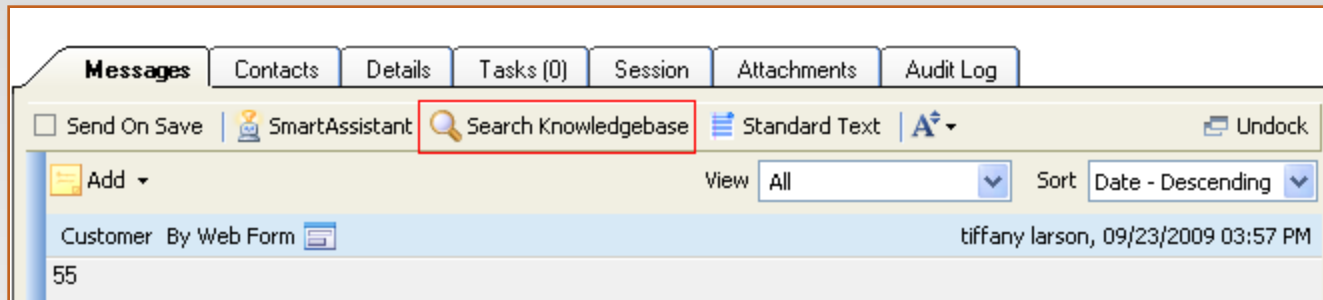
# Agent Desktop Optimization

## ► Standard Text

- Hotkeys
- Use a folder structure to organize standard text
- Alphabetize to make sorting easier
- Ensures consistency and efficiency

# Agent Desktop Optimization

- ▶ Searching the knowledge base within Incident Workspace
  - Provide Internal Access Level for non-customer facing material
  - Append Answer Links or Answer Text



# Agent Desktop Optimization

- ▶ **Agent Guided Assistance and Agent Scripting**
  - **Guided Assistance:** gives agents the ability to locate answers or explanations using question branches to guide them to the appropriate response.
  - **Agent Scripting:** branching logic can be used to guide agents to different pages and sets of questions

# Benefits of Guided Assistance and Agent Scripting

- ▶ Provides the agent with a quick path to appropriate answer
- ▶ Creates consistency in responses
- ▶ Faster ramp-up times / reduced training times
- ▶ Increased First-Call Resolution
- ▶ Agents able to handle more incidents
- ▶ Cross-sell / up-sell opportunities
- ▶ Better customer experience

# General Recommendations

- ▶ Align with the RightNow 8 Steps Methodology
- ▶ Institute a Change Management Process
- ▶ Document your workflow
- ▶ Create a Training Guide and Process
- ▶ Leverage RightNow Community
- ▶ Leverage RightNow Professional Service Resources
- ▶ Schedule regular upgrades
- ▶ Schedule a Tune-Up

# Summary

- ▶ Jones Apparel: Muller adds that the value of RightNow's technology to Nine West has been significantly enhanced by RightNow's services, including its free "Tune-Up" program and its self-directed training. "RightNow makes its solution so easy for non-technical people to use," says Muller. "That's why I've still been able to effectively implement their technology, despite the fact that I am in no way an IT person."
- ▶ Thule: Sixteen days before the Tune-Up, Thule handled almost 500 emails resulting from over 3,700 self-service sessions for a success rate of around 87 percent. Sixteen days after the Tune-Up, only 200 questions came in despite the fact that self-service volume had risen to 8,460 sessions—for a success rate of over 97 percent. Incoming phone call volume also dropped appreciably.

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**QUESTIONS?**

