

A Dive Into RightNow Salesnet™

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Agenda

- Company Background
- Who Are Our Customers?
- How Customers Benefit
- Technology Overview
- Integration
- Roadmap
- Demonstration
- Question & Answer



Who Is RightNow Salesnet?

- 6+ years of sales effectiveness
- Application designed around “sales process”
- Enables pipeline management
- Allows sales reps to manage leads and opportunities
- Targeted at sales organizations
- Focused on Mid-Market and Enterprise segments



RightNow Salesnet Customers

Technology



Financial Services



Healthcare/Bio-Tech



RightNow Salesnet Customers

Services

PIctage

SGL
SUNSET GROUP LTD

Equis
CORPORATE REAL ESTATE SERVICES

MARC
GLOBAL

homedirect
USA

J. J. Keller
& Associates, Inc.

meridian IQ™
Intelligent Solutions. Powerful Results.

PRODIGY
INTERNATIONAL
DEVELOPMENT SALES

FranchiseSolutions

iProspect

Verifications

nerac
CRITICAL RESEARCH, PATENTS & ALERTS

Communications

Comcast

HARRIS tellabs®

atx
COMMUNICATIONS

CommPartners

Birch
telecom

Retail/Other

jetBlue
AIRWAYS®

pink
a beautiful career. a beautiful life.

JUBILATION'S
CHEESECAKE

Otter
BOX

HARCOURT
A MEMBER OF THE NIB CAPITAL GROUP

WORKING GEAR

Torani

MOHAWK

CEQUENT™
A TRAVEL COMPANY
Getting Your Gear On the Road

RIGHT NOW
SUMMIT
2006

Technology Overview

- **On-Demand Application:**
 - Core product
 - Browser-based
 - Highly configurable/adaptable to business requirements
 - Rapid deployment
 - Scalable
- **Complimentary Products:**
 - Enhance the on-demand application

Solution	Purpose
Offline Application	Disconnected access
Wireless Application	Phone/PDA access
Outlook plug-in	Email integration
Sync Tool	ACT!, Goldmine, Outlook, Palm
Word plug-in	Form Letters, Quotes
XML Web Services API	Integration (legacy, ERP, etc..)






























Feature: Access Rights Configurability

Benefit: Give Users The Access They Need

Company Position Chart

Setup : Company Position Chart (CPC) - View

- [edit](#) [del](#)  **Salesnet**
- [edit](#) [del](#)  **CEO**
 - [edit](#) [del](#)  **President**
 - [edit](#) [del](#)  **Channel Directors**
 - [edit](#) [del](#)  **Reseller**
- [edit](#) [del](#)  **CTO**
 - [edit](#) [del](#)  **VP Engineering**
 - [edit](#) [del](#)  **Director of Technology**
 - [edit](#) [del](#)  **Web Developer**
 - [edit](#) [del](#)  **QA Specialist**
 - [edit](#) [del](#)  **Database Administrator**
 - [edit](#) [del](#)  **Support Manager**
 - [edit](#) [del](#)  **Support Specialist**
 - [edit](#) [del](#)  **Special Projects Manager**
- [edit](#) [del](#)  **Controller**
 - [edit](#) [del](#)  **Financial Administrator**
- [edit](#) [del](#)  **VP Sales**
 - [edit](#) [del](#)  **Director Business Solutions**
 - [edit](#) [del](#)  **Consultants**
 - [edit](#) [del](#)  **Account Managers**
- [edit](#) [del](#)  **CMO**
 - [edit](#) [del](#)  **Communications Director**
 - [edit](#) [del](#)  **Director of Marketing**
- [edit](#) [del](#)  **Director Sales**
 - [edit](#) [del](#)  **Inactive Reps**
 - [edit](#) [del](#)  **Inside Sales**
 - [edit](#) [del](#)  **Account Executives**

Position-to-Position Grants

1. Grant the Position Inside Sales Access To the Position Account Managers

Object	View	Edit	Create	Delete	Reassign Ownership	Extend Access
Leads						
Accounts + Contacts						
Deals	✓	✓	✓	✓	✓	✓
Appointments + Tasks						
Documents + Templates						

Field Level Access

Grant Access to this field as follows: [Edit](#) | [Delete](#)

View	Create	Edit
✓		

Position(s): All
Team(s): All
User(s): All

Grant Access to this field as follows: [Edit](#) | [Delete](#)

View	Create	Edit
✓	✓	✓

Position(s): Consultants, Director Business Solutions



Feature: User Level Configurability

Benefit: Scalability

Privilege Profile

The Reporting module can be disabled for select Users

The screenshot shows a 'Privileges' configuration window with several sections. Annotations with blue boxes and arrows highlight specific features:

- Reporting:** A blue box highlights the 'Reporting' section, which includes a checked checkbox for 'Reports tab visible'. Below it are dropdown menus for 'Subtotal Report Definitions' (Run, Create, Edit, Delete), 'Subtotal Report Snapshots' (View, Create, Edit, Delete), 'List Queries' (Run, Create, Edit, Delete Queries), and 'List Layouts' (View, Create, Edit, Delete Layouts).
- Cannot Delete:** A blue box highlights the 'Cannot Delete' section, which includes checked checkboxes for 'Leads', 'Accounts & Contacts', and 'Document Library files', and unchecked checkboxes for 'Deals' and 'Appointments & Tasks'.
- Add-ons:** A blue box highlights the 'Add-ons' section, which includes checked checkboxes for 'Sync Tool', 'Offline Application', and 'Wireless/IM', and an unchecked checkbox for 'Web Services API'.

Group of Users can be prevented from deleting records

The Add-On Modules can be turned on/off for different groups of Users



Feature: Campaign Tracking

Benefit: ROI Measurement

Campaign Metrics

Name: **Free Book Offer from Trade Show**
 Status: **Phase 1** Type: **Print Ads**
 Budgeted **\$10,000** Actual Cost: **\$6,500**
 Cost:
 Expected **\$50,000**
 Revenue:
 Begin Date: **01/16/2006** End Date: **04/16/2006**
 Number **0**
 Sent:
 Expected **1.25 %**
 Response
 (pct):
 Notes:

Member Status	Responded	Default
Confirmed Receipt - No Response		✓
Emailed Back, Interested	✓	
Emailed Back, No Interest	✓	
Sent Email		

Cmpgn ID#:172 | Created: 01/16/2006 11:28 AM by Steve Bombard with Desktop Browser | Last Modified: 01/17/2006 5:17 PM by Steve Bombard

Summary Stats History
Appts/Tasks
Multi-Notes
Attached Docs

Summary Stats History:

Stats as of 08/04/2006 3:46 PM

Total Leads: 759	Total Contacts: 1	Total Responses: 1
Total Lead Responses: 1	Total Contact Responses: 0	
Working Leads: 759	Converted Leads: 0	Rejected Leads: 0
Total Deal Value: \$58,000.00	Total Won Deal Value: \$0.00	
Number Total Deals: 1	Number Won Deals: 0	

- Measures effectiveness of an executed campaign
- Monitors leads and opportunities as they progress through the selling process:

Summary Stats History provides 'metrics' on the success of a particular Campaign



Feature: Lead Management

Benefit: Leads Don't Fall Thru The Cracks

salesnet25 Leads Accounts Contacts Deals Documents Reports Calendar Communicate Campaigns Google JetBlue Mapquest Red S

Home | Add Lead | Add Account | Add Contact | Add Deal | Add Appt | Add Task | Add Document | Add Campaign

Query: My Leads New Filter Layout: Stage Sets

Lead List PREV | A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Go to | NEXT

	First and Last Name ▲	Company Name	Main Phone	Cell Phone	Email	Stage	Created-on Date
<input type="button" value="Edit"/>	<input type="button" value="Del"/> test					Not Yet Contacted	4/19/2006 3:11 PM
	test55					Converted	4/19/2006 3:12 PM
<input type="button" value="Edit"/>	<input type="button" value="Del"/> <u>Allegre, Raul</u>	Ganubian Consulate	201-544-9900			Not Yet Contacted	4/20/2006 9:38 AM
	Bill Alvarez	Account20	215-175-2525			Converted	2/14/2006 12:10 PM
	Bob Blum	Account15	181-712-1555x5525			Converted	2/14/2006 12:10 PM
	Bob Evans	ABC, Inc.				Converted	2/16/2006 10:18 AM
<input type="button" value="Edit"/>	<input type="button" value="Del"/> <u>Bond, Jim</u>	Navy Seal Training Center	860444-3000		usnavy@usnavy.com	Not Yet Contacted	4/20/2006 9:38 AM
	Bruce Burke	Brooks			sample@email.com	Converted	2/16/2006 12:06 PM
	Christy Burke	Account17	215-277-7555			Converted	2/14/2006 12:10 PM
<input type="button" value="Edit"/>	<input type="button" value="Del"/> <u>Delamare, Marie</u>	Escargots Nouveaux	85.57.00.07			Not Yet Contacted	4/20/2006 9:38 AM
	Fred Jones	Sample Lead Company	781-781-7811	781-234-1234	sample@sample.com	Converted	7/18/2006 11:41 AM
<input type="button" value="Edit"/>	<input type="button" value="Del"/> <u>Giudici, Giovanni</u>	Pasta Buttini s.r.l.	(089) 6547665			Not Yet Contacted	4/20/2006 9:38 AM
<input type="button" value="Edit"/>	<input type="button" value="Del"/> <u>Goff, Dave</u>	Bimbleman's Lite Inc.	904/569-9811		badbeer@bimble.com	Not Yet Contacted	4/20/2006 9:38 AM
	Guinness Gabriel	Guinness Incorporated			gman@gmaninc.com	Converted	2/14/2006 11:10 AM
<input type="button" value="Edit"/>	<input type="button" value="Del"/> <u>Henley, Don</u>	Hotel California	904/644-7891			Not Yet Contacted	
	Janie Melrose	TestCo				Converted	
	Jim NewGuy	Accounting Company	781-837-8321		s@t.com	Converted	
	Joanie Jones	Gillette				Converted	
	Joe Cirelli	CVS			sample@email.com	Converted	
	Joe Smith	Sample Co	781-567-9982		sample@sample.com	Converted	

- Create a centralized or decentralized pools of leads
- Monitor follow-up and conversion rates on Leads to Opportunities

Edit Lead Queue

* Name: Open Closed

Description:

Queue Type: * Lead Exposure Limit:

Lead Field that determines precedence:

- Members can view Leads owned by this Queue
- Members can change the Owner of Leads owned by this Queue
- Members can add a Lead to this Queue
- Members can edit all fields of a Lead owned by this Queue
- Users can delete a Lead
- When converting a Lead, create a Deal record

Queues allow a group of sales people to draw from a pool of leads

Lead Information

Lead: **Stershic, Mike (Wayne Memorial Health Systems Inc)**

Owner: **Steve Bombard**

Lead Converted Stage:

Records To Create: Account Contact Deal

Contact Information

Contact: **Stershic, Mike**

Owner: **Bombard, Steve**

Append Lead Notes to Contact Notes

Account Information

Account Name: **Wayne Memori**

Owner: **Bombard, Stev**

Append Lea

Deal Information

Deal Name:

Sales Process:

Start Date:

1st Step Due Date:

Deal Owner:

Append Lea

- Sales reps assign a disposition to Leads of – Converted or Rejected
- Converted Leads become an Opportunity and follow a Sales Process

Feature: Process Builder

Benefit: Sales Effectiveness

Step 1: Initial Call (0% - 5%) [Add Result](#) | [Reorder Results](#) | [Add Auto Task](#)

Step Type: Step Purpose:

Results	Goto	Next Step Due	Next Step Owner	Layout
Interested	↘ 3	[1 week, Adj]	[Current Step Owner]	Add
Not Interested Now	↘ 2	[3 days]	[Current Step Owner]	Add
Not Interested At All	Lost ↓	[Finished]	[Current Step Owner]	Add
Not There	↻	[1 week, Adj]	[Current Step Owner]	Chang

Auto Tasks Task Type Task Purpose

[Notify Manager](#)

Step 2: Send Information (0% - 10%) [Add Result](#) | [Reorder Results](#) | [Add Auto](#)

Step Type: Step Purpose:

Results	Goto	Next Step Due	Next Step Owner	Layout
Sent It	↘ 3	[2 weeks, Adj]	[Current Step Owner]	Add

Step 3: Follow-Up Call (0% - 15%) [Add Result](#) | [Reorder Results](#) | [Add Auto Task](#)

Step type: Step Purpose:

Results	Goto	Next Step Due	Next Step Owner	Layout
Interested	↘ 4	[1 week, Adj]	[Current Step Owner]	Add
Not Interested At All	Lost ↓	[Finished]	[Current Step Owner]	Add
Not Interested Now	↻	[3 months, Adj]	[Current Step Owner]	Add
Not There	↻	[1 week, Adj]	[Current Step Owner]	Add

Define the "Steps" in your sales process

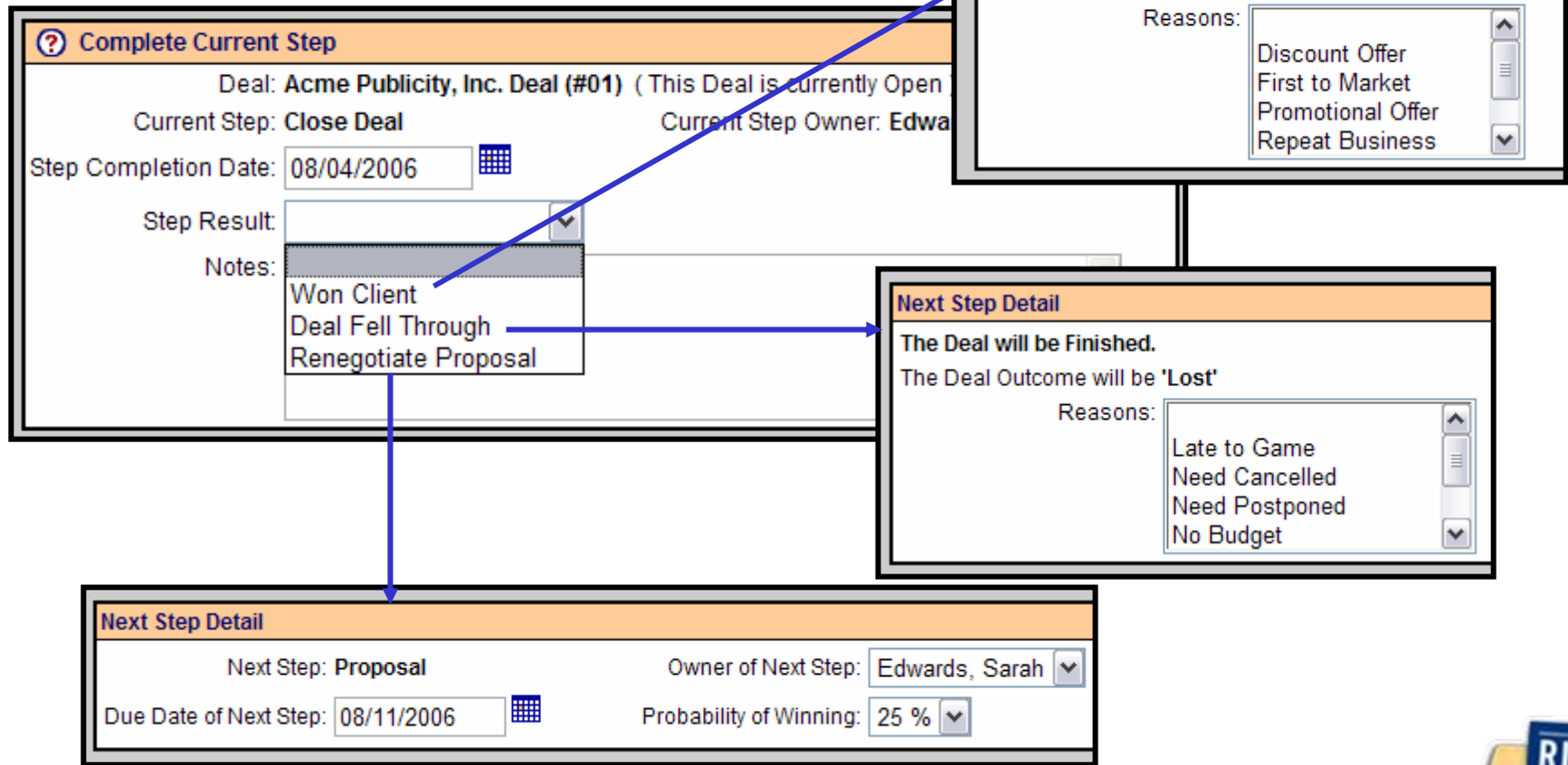
Create "Results" or outcomes to indicate the appropriate next Step in the sales process



Feature: Opportunity Management

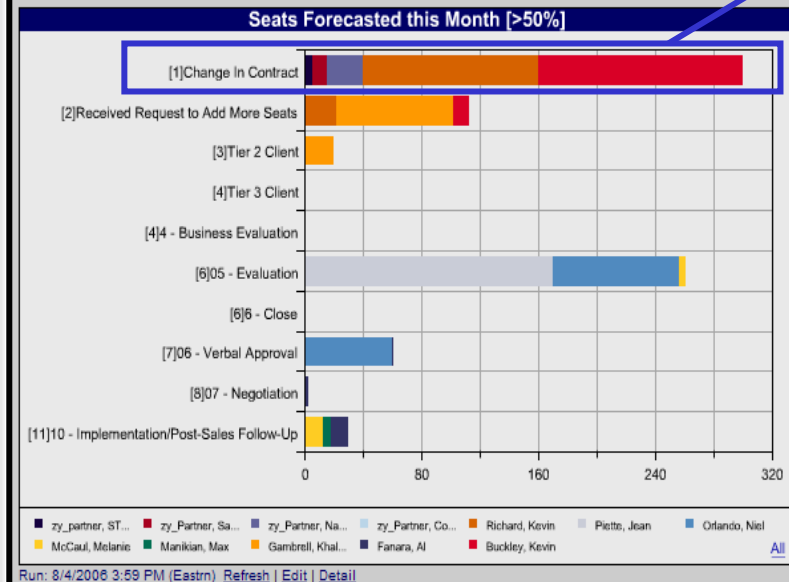
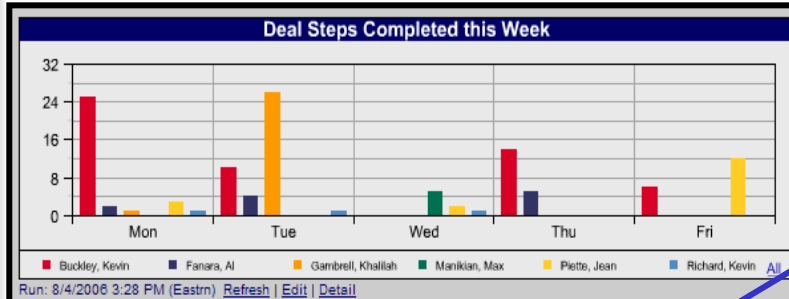
Benefit: Sales Guidance

Updating A Deal From A Sales Rep Pe



Feature: Dashboards

Benefits: Drill Down Reporting



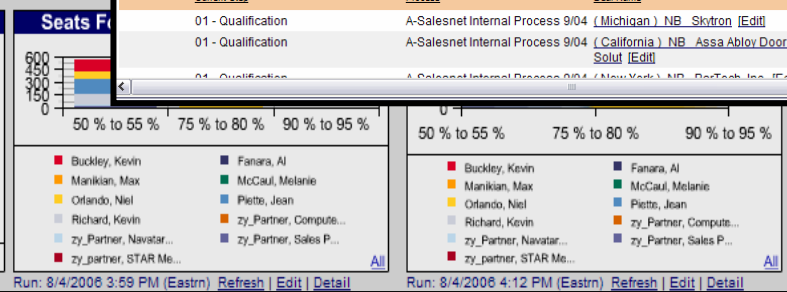
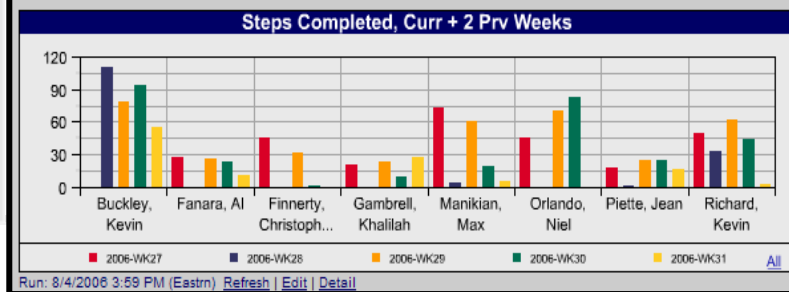
No Bull Leads [by day]

Run: 8/4/2006 3:28 PM (Eastrn) Refresh | Edit | Detail

Owner	Current Step	Process	Deal Name	Deal Value	Probability	Projected Finish D
Buckley, Kevin Subtotals (7 records)	Change In Contract	AM - Change In Contract	IntelItarget - 10 seats new seats [Edit]	\$0.00	50 %	8/30/2006
	Change In Contract	AM - Change In Contract	Vent - Axia - Entelecon Partner deal [Edit]	\$0.00	50 %	8/30/2006
	Received Request to Add More Seats	AM - Change In Contract	Entelecon - HRH [Edit]	\$0.00	100 %	8/25/2006
Owner: Carstens, Demitra Subtotals (1 record)						
Stand alone project	BSG Delivery	Data Extract				
Owner: Fanara, AI Subtotals (10 records)						
00 - New Lead / Target	A-Salesnet Internal Process 9/04	Absolutely V				
01 - Qualification	A-Salesnet Internal Process 9/04	(Arizona) Y				
01 - Qualification	A-Salesnet Internal Process 9/04	GHMComm				
01 - Qualification	A-Salesnet Internal Process 9/04	(Nebraska)				
01 - Qualification	A-Salesnet Internal Process 9/04	(Ohio) NB				
01 - Qualification	A-Salesnet Internal Process 9/04	(New Jersey)				
01 - Qualification	A-Salesnet Internal Process 9/04	(Nebraska) WinfoReg	Diversified [Edit]	\$0.00	0 %	8/21/2006
01 - Qualification	A-Salesnet Internal Process 9/04	HomeFederal Bank	4/12/2006 [Edit]	\$0.00	0 %	8/10/2006
01 - Qualification	A-Salesnet Internal Process 9/04	(TX) NBKS FNB	[Edit]	\$0.00	0 %	8/30/2006
01 - Qualification	A-Salesnet Internal Process 9/04	(California) NB	Moen Industries [Edit]	\$0.00	0 %	8/6/2006
07 - Negotiation	A-Salesnet Internal Process 9/04	Mitchell Douglas Inc.	[Edit]	\$0.00	90 %	8/29/2006
Owner: Finnerty, Christopher Subtotals (10 records)						
01 - Qualification	A-Salesnet Internal Process 9/04	(Michigan) NB	Skytron [Edit]	\$0.00	0 %	8/15/2006
01 - Qualification	A-Salesnet Internal Process 9/04	(California) NB	Asa Ablow Door Security Solut [Edit]	\$0.00	0 %	8/20/2006
01 - Qualification	A-Salesnet Internal Process 9/04	(New York) NB	DeTech Inc. [Edit]	\$0.00	0 %	8/22/2006

Run: 8/4/2006 3:59 PM (Eastrn) Refresh | Edit | Detail

Click or drill down on a column to see the details



Feature: Reporting

Benefit: Real Time Reporting

- Build Reports by clicks not code
- Share Reports with Users as appropriate
- Run reports with 1 click to see real-time data

Drill down from a Report to view the record in detail

- Take a "Snapshot" to save a copy of the data
- Export the data to Excel or CSV



Integration: Web Services API

- **Technology**

- SOAP/XML Web Services
- Platform/Language independent
- Dedicated developer site
 - Code samples
 - Discussion groups
 - Documentation
 - Case studies

- **Use Cases**

- Integration with legacy systems (ERP, Accounting, etc.)
- 3rd Party Applications (Data Cleansing, Data Update, etc.)
- Sales Methodologies (Miller-Heiman)
- RightNow Service 7.5.5



Integration: Sales Methodologies

The screenshot shows two overlapping browser windows. The background window is 'Salesnet - View Prospect' for prospect '3/30/2006-Bischoff'. The foreground window is 'Strategic Selling - Miller Heiman Sales Access Manager' for prospect '3/30/2006-Bischoff'. The Strategic Selling interface includes a 'Bluesheet' form with the following sections:

- Adequacy of Current Position:** A scale from EUPHORIA to PANIC, with 'EUPHORIA' selected.
- My Position:** A grid with options: Only Alternative, Front Runner, Shared, Zero.
- Place in Sales Funnel:** A grid with options: Universe, Above, In, Best Few.
- Timings for Priorities:** A grid with options: Urgent, Active, Work in, Later.
- Ideal Customer Criteria:** A table with 5 criteria: Likes to buy products, Has budget, Interested in win-win relationship, Believes in paying for value, Highly regarded in space.
- BUYING INFLUENCES INVOLVED:** A table with columns for Name, Title, Location, IR, DI, M.
- BUYING INFLUENCE'S KEY WIN - RESULTS:** A table for recording key wins.
- HOW WELL IS BASE COVERED?:** A table for recording evidence to support a rating.
- BEST ACTION PLAN:** A table with columns for WHAT, WHO, WHEN. Example: 'Meet with CFO to present findings fr Adam Wiatrowski' on '05.17.2006'.

A text box in the foreground contains the following text:

- Miller Heiman Bluesheet is launched.
- User fills out required information and clicks "Save".
- Upon saving, relevant Bluesheet data for the Prospect is updated seamlessly in RightNow Salesnet using Web Services API.

Integration: RightNow Salesnet - RightNow Service

View Account

Print Save As Map [RightNow: L](#)

Account Information

Account Peters & Peters Industries
Name:
Main Phone: (865) 769-3432
Industry: Technology

Notes:

Account Address

Address 1: 5 Bizz Lane Address
City: Sunnydale State/P
Country: USA Web S

Contacts Deals Related Recs Appts/Tasks Multi

RightNow Incidents

	Reference #	Status	Subject
View	060713-000002	Updated	Phone not working
View	060712-000000	Waiting	Battery for my VoIP

Battery for my VoIP phone?

Discussion Thread

Note (Kevin Miller) 07/12/2006 11:37 AM
test

Customer (Kevin Miller) 07/12/2006 11:37 AM
asdf

Primary Contact

First Name: Don
Last Name: Barzini
Organization: Peters & Peters Industries
Login:
Password:
Title: Senior Operations Manager
Contact Type:
Email: vmware_win98_se@hotmail.com
Email - Alternate #1:
Email - Alternate #2:
Office Phone: (865) 769-3432
Mobile Phone:
Fax:
Assistant Phone:
Home Phone:
Street 540 116th Street
City Santa Clara
State/Province
Postal Code 77847
Country

Additional Information

File Attachments

Name	Size	Content Type
z.txt	2b	text/plain

Done Internet

•Clicking View link displays entire Incident details from RightNow Service



Roadmap

- **Summer 2006**
 - Integration of RightNow Salesnet and RightNow Service
 - o Access Service knowledge related to Accounts, Contacts, Deals from within RightNow Salesnet
 - o Ability to push Account/Contact records from RightNow Salesnet into RightNow Service
 - o View RightNow Salesnet Deals related to Organization/Contacts from RightNow Service
- **Q4 2006 – RightNow 8**
 - Seamless upgrade path for RightNow Salesnet customers who wish to migrate
 - Access to a sandbox (test) environment providing a live copy of configuration, data, etc. prior to production upgrade
 - Customers can choose to upgrade on their own timeframe or choose not to upgrade at all
- **2nd Half 2007 – Emerald**
 - Unified Sales Automation solution on RightNow platform
 - Incorporates core Salesnet feature set including workflow, results-driven UI, and configurability
 - Same seamless upgrade path offered for RightNow Salesnet customers
 - RightNow Sales moves forward as one product



Demonstration



Questions and Thank You

