Advanced Business Rules: Automating the Breakthrough Experience

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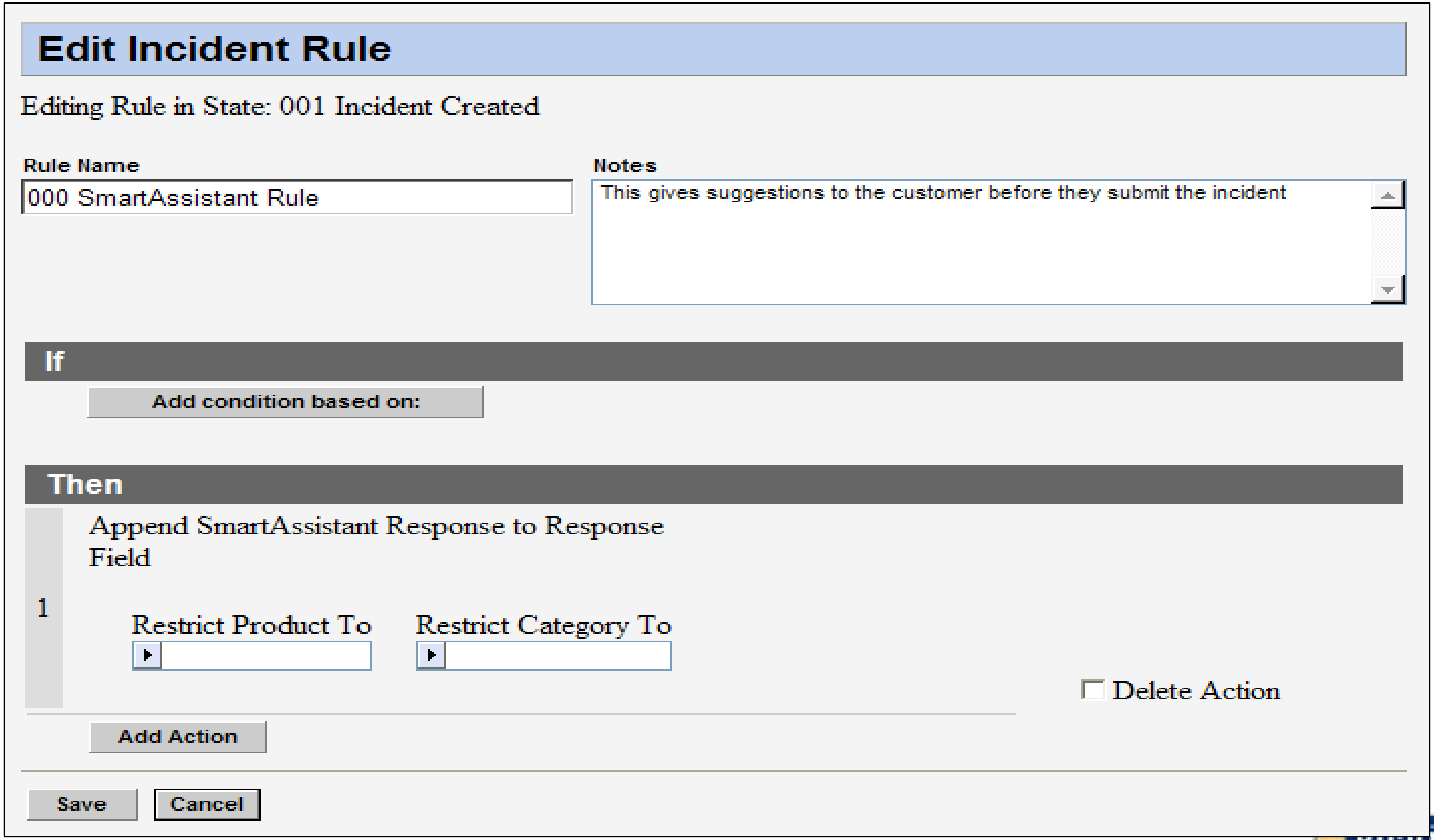
Agenda

- What types of rules are you using currently to provide a great experience to your customers?
- Review rules that can help improve customer experience
- Using threads and text fields
- Multiple interface rule management
- Creative rules
- Best Practices
- Resources

Provide Knowledge at the Point of Action

- Question – what types of rules can you create to provide information to your customers before they submit an incident?
- SmartAssistant rule
  - SmartAssistant rule suggest answers to your customers before they submit an incident
  - Result is reduction in incident submission rates
    - Note – there is an out of the box report that shows how many people exit after receiving suggested answers
    - This report can help determine how effective the SmartAssistant suggestions are
  - Tip – evaluate your configuration settings to ensure that most relevant answers are suggested
    - Example – suggested answers can match the product/category settings selected by the customer
- Where would you place the SmartAssistant rule?

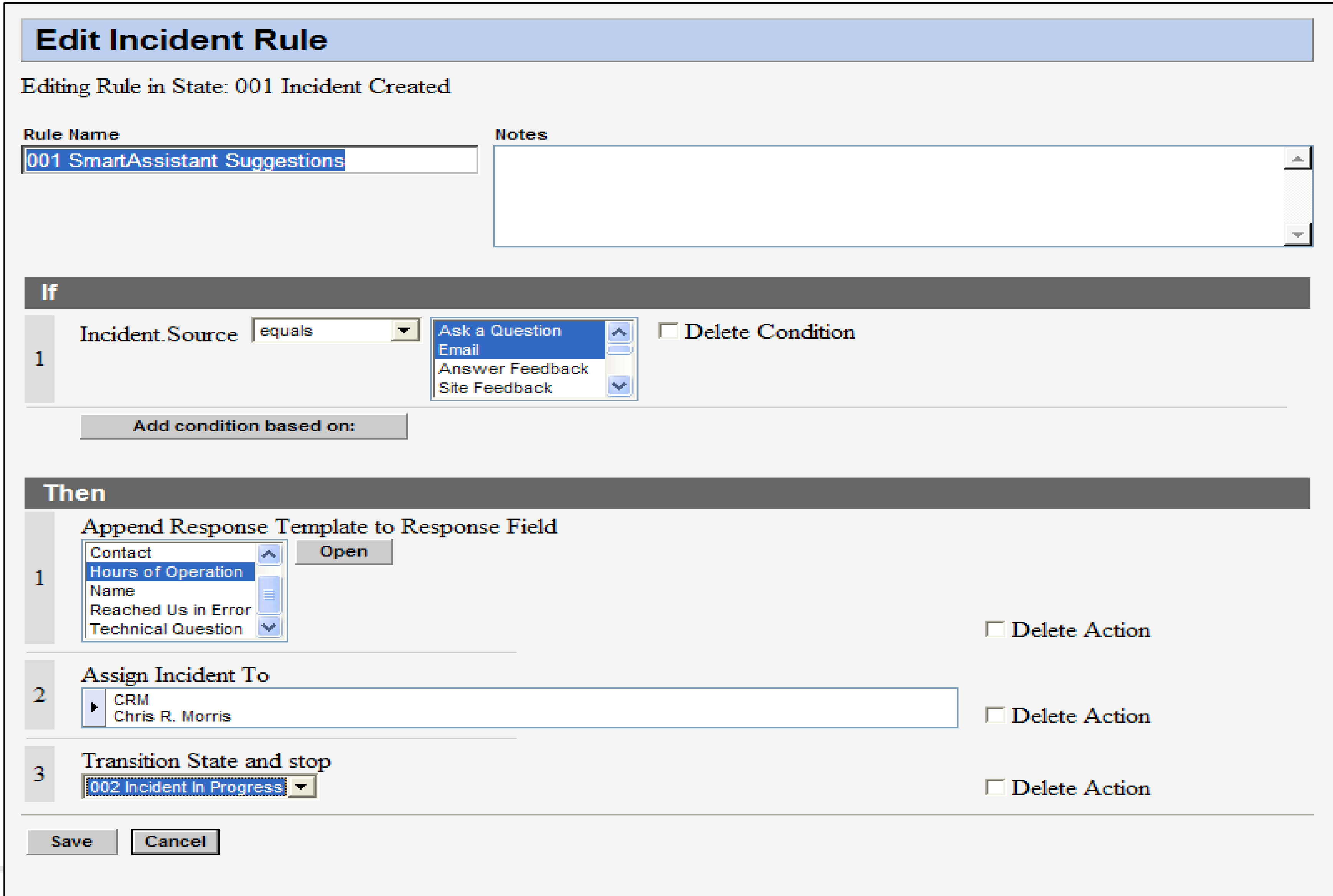
SmartAssistant



Appending Response Templates

- Can create specific text to send back to customers based on criteria in the “if” statement
- Common types of response templates
  - Hours of operation
  - Setting response expectations for customers
  - Redirect to correct resource (if not an issue an agent would handle)
    - This type of inquiry is handled by Human Resources that can be reached at….
  - Short term notifications
    - Office is closing early today….
- Can append a response template to a note or to a response to a customer
- Where are standard responses created?

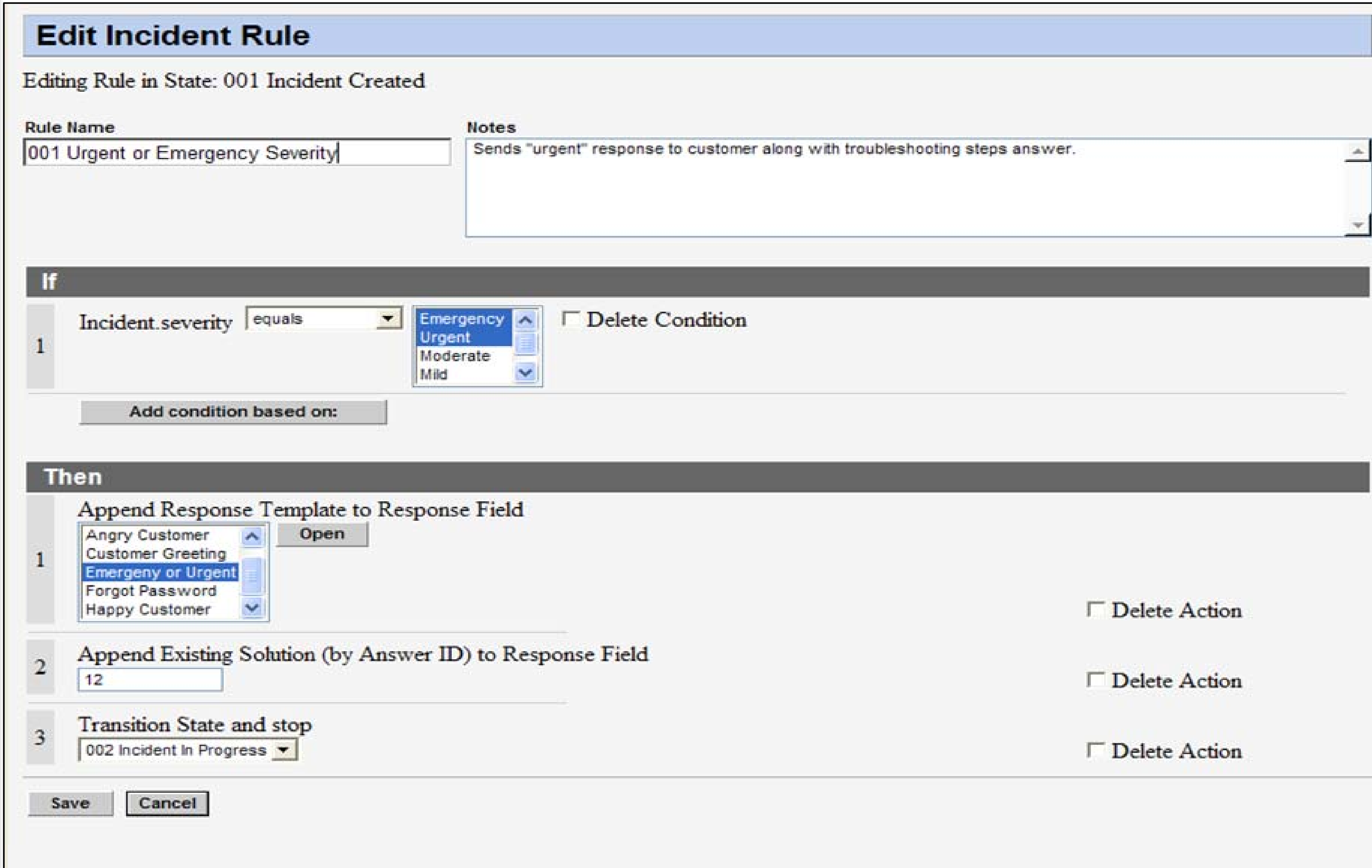
Appending a Response



Append an Answer ID

- Determine types of incidents where specific answer IDs should be recommended to your users
- Create a rule that uses the action Append Thread>Append Existing Solution to Response Field
- Answer will display to customers BEFORE the incident is created

Combine Append Response and Solution



Using Threads and Text Fields

- Opportunities and Incidents have text fields that can be leveraged for rules
  - Incidents: Customer Thread, Staff Thread, Summary
  - Opportunities: Summary
- To create effective rules operators must be used correctly with text
  - **Equals** – field values match exactly
  - **Does not equal** – field does not match value exactly, including case
  - **Contains** – case sensitive; if any part of the field matches the stemmed value of the word (NO wildcards)
  - **Does Not Contain** – is not contained in any part of the field, also case sensitive
  - **Matches Regular Expression** – not case sensitive; matches regular expression specified in the value of the field condition
  - **Does Not Match Regular Expression –** does not matches regular expression specified in the value of the field condition

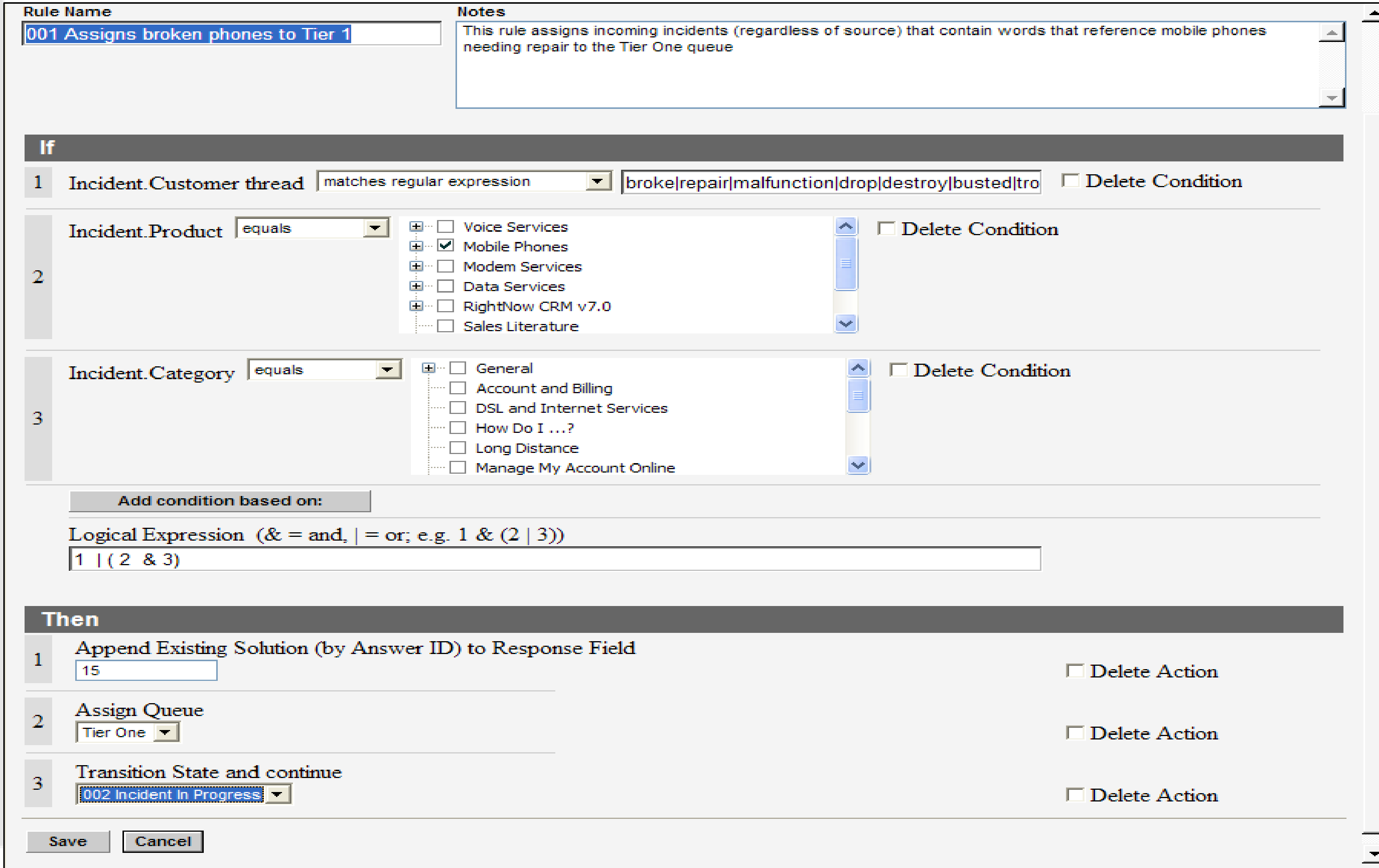
Regular Expressions

<table>
<tr><th>This regular expression:</th><th>Will match:</th></tr>
<tr><td>^eSC</td><td>eSC at the beginning of a line</td></tr>
<tr><td>eSC$</td><td>eSC at the end of a line</td></tr>
<tr><td>^eSC$</td><td>eSC as the only word on the line</td></tr>
<tr><td>^...$</td><td>Matches a line with exactly three characters</td></tr>
<tr><td>^......-.....1</td><td>would match a reference number ending in '1'</td></tr>
<tr><td>t.e</td><td>tae, tbe, tce, t%e, tie, the, toe ....</td></tr>
<tr><td>at*e</td><td>ae, ate, atte, attte, atttte ...</td></tr>
<tr><td>at+e</td><td>ate, atte, attte...</td></tr>
<tr><td>at?e</td><td>ae. ate</td></tr>
<tr><td>m[aeiou]t</td><td>mat, met, mit, mot, mut</td></tr>
<tr><td>cat|mat</td><td>cat,mat</td></tr>
</table>

Common Rules Using Threads/Text

- SPAM rules
  - NOT create an incident if those words are included in the message, or
  - Create an incident but notify or assign it to someone who can review it for this type of content
- Routing to the appropriate person/queue based on thread/summary
- Using thread/summary information to append the appropriate responses
- Can use multiple criteria in the "if" statement and use logical expressions to determine how the criteria match

Matches Regular Expression



Rule Name: 001 Assigns broken phones to Tier 1

Notes: This rule assigns incoming incidents (regardless of source) that contain words that reference mobile phones needing repair to the Tier One queue

If

1 Incident.Customer thread — matches regular expression — broke|repair|malfunction|drop|destroy|busted|tro — Delete Condition

2 Incident.Product — equals — Voice Services; Mobile Phones (checked); Modem Services; Data Services; RightNow CRM v7.0; Sales Literature — Delete Condition

3 Incident.Category — equals — General; Account and Billing; DSL and Internet Services; How Do I ...?; Long Distance; Manage My Account Online — Delete Condition

Add condition based on:

Logical Expression (& = and, | = or; e.g. 1 & (2 | 3))

1 | (2 & 3)

Then

1 Append Existing Solution (by Answer ID) to Response Field — 15 — Delete Action

2 Assign Queue — Tier One — Delete Action

3 Transition State and continue — 002 Incident In Progress — Delete Action

Save | Cancel

Route Incident Based on Email Header

- Route based on EMAIL HEADER – allows for you to get a bit more granular than routing off of just text, product/ category or email addresses
- Turn on configuration setting
- Adds another choice in drop down for incident criteria
- Use for encoding (i.e. Chinese characters)
- Look for IP address of a mail server rather than email address and filter or route based on this
- Handle emails containing Mailer Daemon information

Enable Configuration Setting

EGW_SAVE_EMAIL_HEADERS

Description

Specifies whether incoming email header information is saved and made available when editing an incident on the Support Console. Default is disabled (No).

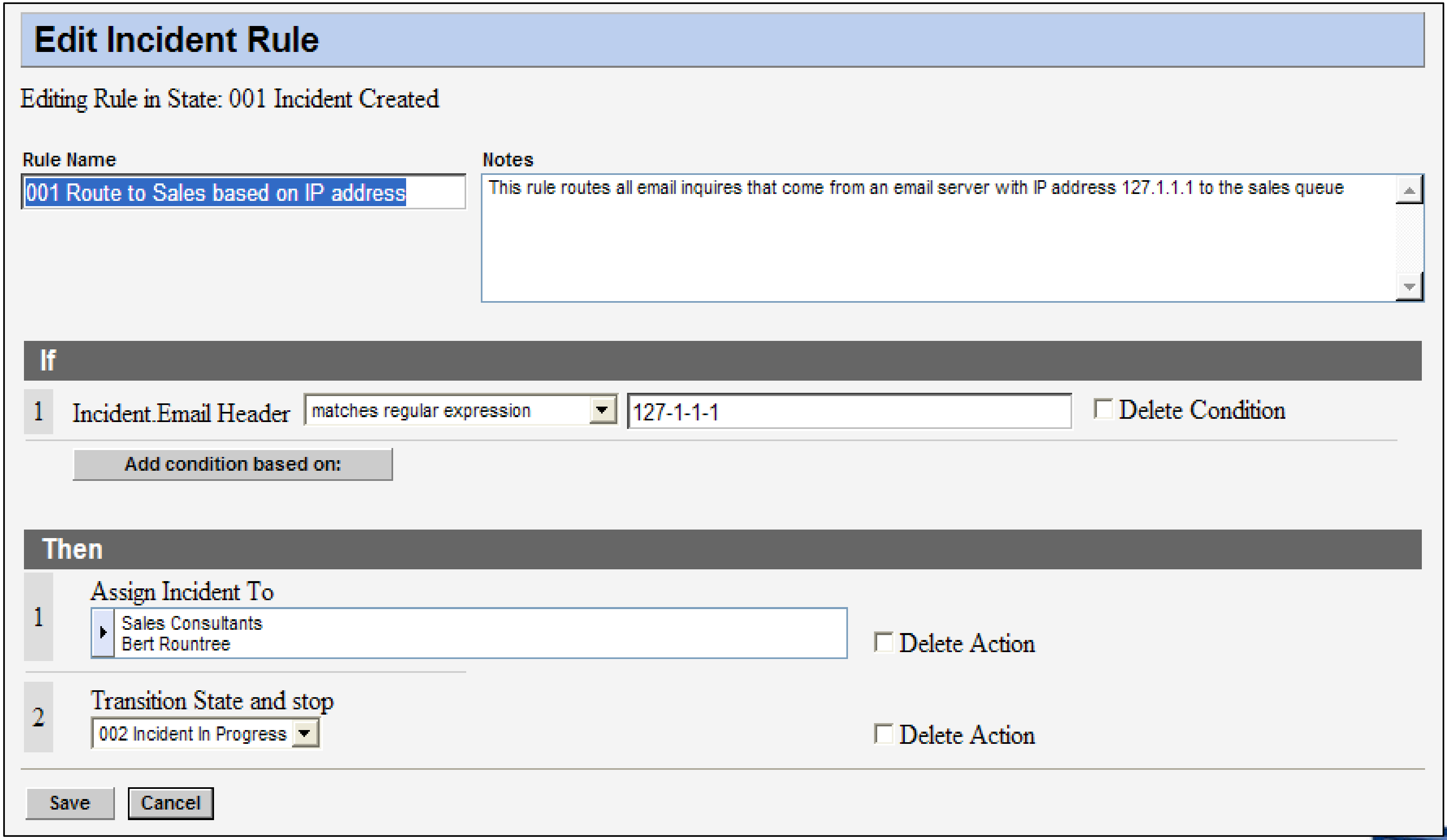
Value (Boolean)

(•) Yes ( ) No

Note: Updates will not be committed to the live file until the 'Commit and Exit' button is pressed.

Update Reset

Example of Rules with Enabled Header



Edit Incident Rule

Editing Rule in State: 001 Incident Created

Rule Name

001 Route to Sales based on IP address

Notes

This rule routes all email inquires that come from an email server with IP address 127.1.1.1 to the sales queue

If

1 Incident.Email Header | matches regular expression | 127-1-1-1 | ☐ Delete Condition

Add condition based on:

Then

1 Assign Incident To
Sales Consultants
Bert Rountree
☐ Delete Action

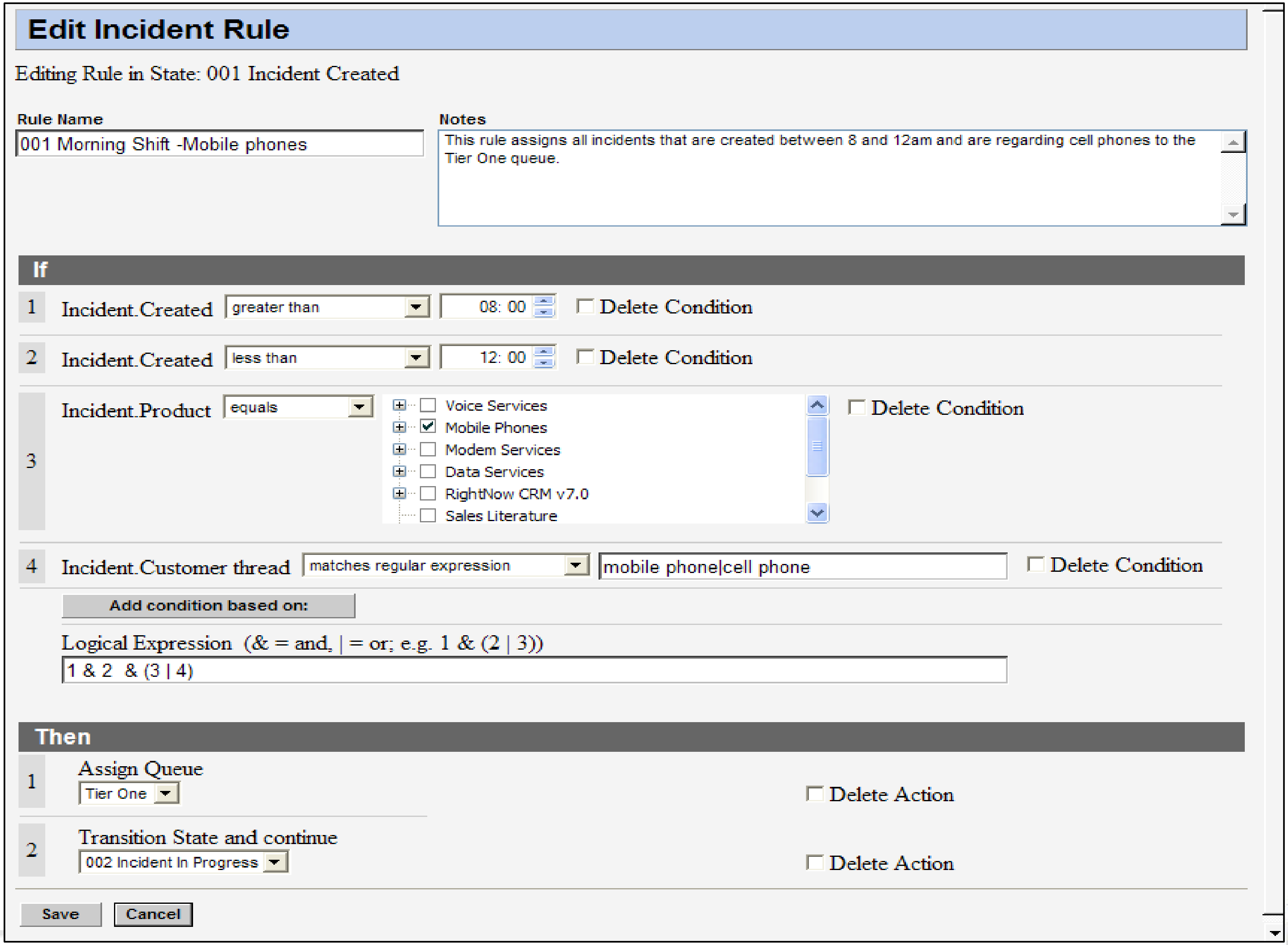
2 Transition State and stop
002 Incident In Progress
☐ Delete Action

Save | Cancel

Routing Incidents Based on Time of Day

- Business problem: Company A has 400 agents divided up into groups that manage incoming inquiries based on subject/topic/content as well as time of day.
- Depending on the time of day the incident comes in, it may be routed to a different group of agents (many shifts, each with different skill sets)
- Solution: Use the “create” field to specify time intervals during which incidents should be assigned to specific teams/queues/etc.

Routing Based on Create Time



Edit Incident Rule

Editing Rule in State: 001 Incident Created

Rule Name

001 Morning Shift -Mobile phones

Notes

This rule assigns all incidents that are created between 8 and 12am and are regarding cell phones to the Tier One queue.

If

1	Incident.Created	greater than	08: 00	Delete Condition
2	Incident.Created	less than	12: 00	Delete Condition
3	Incident.Product	equals	Voice Services ☑ Mobile Phones Modem Services Data Services RightNow CRM v7.0 Sales Literature	Delete Condition
4	Incident.Customer thread	matches regular expression	mobile phone|cell phone	Delete Condition

Add condition based on:

Logical Expression (& = and, | = or; e.g. 1 & (2 | 3))

1 & 2 & (3 | 4)

Then

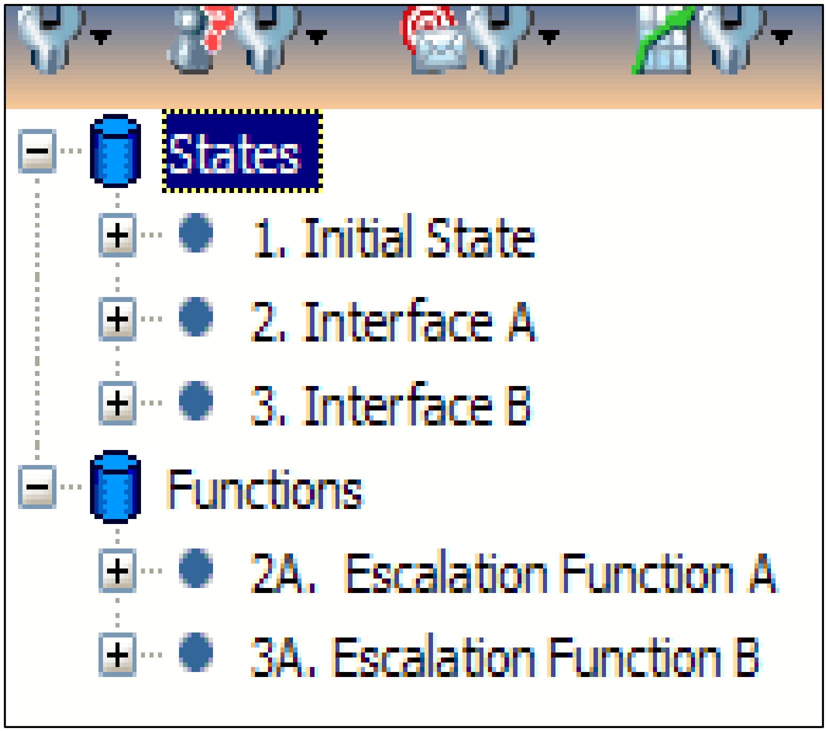
1	Assign Queue Tier One	Delete Action
2	Transition State and continue 002 Incident In Progress	Delete Action

Save | Cancel

Managing Rules for Multiple Interfaces

- The key to creating and managing rules for multiple interfaces is ORGANIZATION
- Initial state can route incoming incidents to the appropriate state (container) based on interface name or language
- Clearly indicate which states contain which type of rules, often there may be more than one manager looking at rule sets
- Edit and activate rules in the same session (unless you only have one person managing all rules)
- Use naming conventions for states/rules/functions

Multiple Interface Example



- Initial state contains initial routing rules with conditions that route based on interface
- If interface = A, then transition to interface A state and continue processing
- May call an escalation function that contains escalation rules specific to an interface, or if same escalations apply to all incidents you may use them all in one function
- Numbering states helps with organization as well

Get the Right Information to the Right People Right Now

- Rules are extremely powerful, here are a few more examples of common rules that can improve customer service and experience:
  - Send a notification to a Sales Representative to let them know their client has submitted an incident
    - If organization or contact = “x”, send an email with a subject line of “x” to the rep
  - Rules can reassign an incident automatically based on specific standard text used by an agent
    - If standard text contains “please call us directly”, rules can update the status to “waiting for call back” and route directly in to a “waiting for callback” queue
  - Use rules to set custom fields
  - Use answer rules to manage your knowledge base, including:
    - Automate answer publishing process using rules
    - Route answers to the right people for review
    - Ensure that all answers have gone through the right channels before publishing
  - Use contact and organization rules to manage/update contact and organization records

What’s Coming in 8?

- Variables
  - Offers more flexibility in conditional routing
  - Allows you to weight and score certain criteria to take the appropriate action based
- If, then, else
  - Allows for two actions to take place in one rule
  - For example, if you wanted to assign all incidents that meet “x” criteria to queue one, but wanted to assign everything that didn’t meet that criteria to queue 2…
    - If product = “x”, then assign to queue one, else assign to queue two

Best Practices

- Map your workflow
- Use practical naming conventions and fill in the notes fields in rule definitions
- If you have multiple interfaces, organize your rules logically and make sure the states/functions are named appropriately
- Use the notes fields to describe the function of the rule
- Limit the number of people who have access to editing rules
- Deactivate rules that are no longer necessary, and delete when appropriate
- Automate responses for customers when possible
- Route to the right people for best response times
- Use views and reports to help manage escalations
- Limit the number of notifications you send
- Set the right expectations for customers

Resources

- RightNow.custhhelp.com
  - RightNow Documentation: ID 1350
  - Product Overview Trainings: ID 2000
  - Search on “rules”, there are over 100 FAQs!
- Professional Services
  - Onsite consulting services
  - Training workshops
  - Online training!