

# Tips and Tricks from RightNow's Marketing Team

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RightNow Technologies



# Agenda

- Goal
  - Provide concrete examples you can implement immediately to improve your customer experience
  - Improve your customer experience through the “5 Focus Areas for World Class Marketing Automation”
- Case study format of RightNow’s implementation of RightNow Marketing™ to illustrate recommendations and best practices



# Average Email Delivery and Open Rates

- Delivery Rate 88%
- Open Rate 30%
- Click-Through Rate 12%
- Conversion Rate 1%

Data from JupiterResearch, April 2005



# What is Your Level of Sophistication?

- **24%** of the market sends undifferentiated broadcast mailings
- **65%** of the market utilizes some level of quasi personalization (segmented campaigns)
- **11%** of the market utilizes context sensitive (targeted campaigns)

Data from JupiterResearch, April 2005



## ...And What About Email Graphics

- 45% of at-work users “rarely” or “never” download images in preview pane

Data from EmailLabs study, October 2005



# Overview of RightNow Marketing Implementation

## Trailing 12 Month Audience Email Statistics

- 92% Delivery Rate
- 20% Open Rate
- 1% Click-Through Rate

## Trailing 12 Month Event Triggered Email Statistics

- 98% Delivery Rate
- 44% Open Rate
- 10% Click-Through Rate



# 5 Ways to Promote a Great Customer Experience Through Email Marketing

## #1 Permission Based Email

#5 Transactional Follow-Up / Triggered Campaigns

#2 Website / Landing Pages

Improving Your Customer's Experience

#4 Confirmation Pages

#3 Webforms / Conversion



# #1 Permission Based Email

- Leverage all external ways to build your in house list. Your in house list will perform the best.
  - Direct mail
  - Newsletter sponsorship
  - Co-branded online activities (to your website)
  - SEO, PPC, interactive (to your website)
  - Print advertising
  - Events
- Make sure your site is working hard to **secure their permission** for further communication.



## Tip: Securing Permission

- Make your form as short as possible
  - First name and email is sufficient for some companies
  - Others may require full contact information
- Make the submit button clear
- Share your privacy policy
- Entice your customers to opt-in
- Test your copy
- If possible, let them know how often they will hear from you

### Additional Offer:

RightNow offers exclusive white papers, industry reports, case studies and timely invitations to webcasts and events.

*I would like to receive ongoing communications from RightNow!*

(You can always change your mind later!)

[RightNow Technologies Privacy Policy](#)



**FINAL STEP:**

Submit Request



# Tip: List Hygiene – Get Started Right

- If you obtain lists from outside sources, be vigilant about checking list hygiene
  - Check for duplicates, you may be paying for dupes
  - Check for signs of questionable practices
    - o List appending ([j.doe@abc.com](mailto:j.doe@abc.com), [johndoe@abc.com](mailto:johndoe@abc.com), [jdoe@abc.com](mailto:jdoe@abc.com) )
    - o Large volume of email addresses from one domain (ISP accounts would be exception)
  - Check to make sure the vendor collected the contacts in an ethical manner
- Test your list
  - Send test cell to 5% - 10% of list to ensure quality
- Tip: For lists less than 65,000. Use Excel add-in to perform quick de-dupe and data quality checks.
  - [www.digdb.com](http://www.digdb.com)



# Tip: Use Segments Over Lists

Definition Delivery

Name EVCRM - MAIL - 060725 - Westford User Group 2 Outbound Email ID 794

Category Marketing Mailings Customer Mailings Status Complete

Audience

Type	Name	Include/Exclude
Segment	Customers - US - North East (NY ...	Include

Planned Launch 7/24/2006 9:38 AM

Send Date/Time 07/25/2006 08:00 AM

Created 07/19/2006 01:42 PM

Last Updated 07/26/2006 04:48 PM

Audience Count Not Calculated Calculate

Last Count 303

Last Counted 07/19/2006 01:44 PM

URL Parameters

Notes

Save Cancel Spelling

Done User: Andrew Hull 8:04 AM

Name Customers - US - North East (NY No

Details Data Set Grouping

Table Instances

- contacts
  - orgs
    - org\_addrs

Fixed Filters (always applied and cannot be changed at run-time)

Name	Expression 1	Operator	f(x)	Expression 2	▼ / ▲
global	contacts.ma_opt_in	in list	<input type="checkbox"/>	Yes	▼
mktoptin	contacts.c\$smktg_opt_out	in list	<input type="checkbox"/>	Yes	▼▲
active	orgs.c\$active_status	in list	<input type="checkbox"/>	Active, Internal Site	▼▲
contactstate	contacts.prov_id	in list	<input type="checkbox"/>	CT, MA, ME, NH, NY, RI, VT	▼▲
orgstate	org_addrs.prov_id	in list	<input type="checkbox"/>	CT, MA, ME, NH, NY, RI, VT	▲

Logical Expression

(contactstate | orgstate) &global&mktoptin&active



# Tip: Using Targeted Segments Will Improve Open and Response Rates

The screenshot displays an email campaign management interface. At the top, a table shows the performance of a campaign named 'Delivery Cell #1'. A red box highlights the columns for 'Sent', 'Delivered', 'Opened', and 'Clicked' metrics. Below the table, a configuration panel allows for setting campaign details such as name, status, subject, mailbox, and recipient information.

Name	Status	Send Date/Time	Sent	Delivered	Opened	(%)	Clicked	(%)	Replied	Unsub.
Delivery Cell #1	Complete	07/25/2006 08:00 AM	282	275	79	(28%)	10	(3%)	2	0

**Name:** Delivery Cell #1  
**Status:** Complete  
**Cell Type:**  Final  
**Send Date/Time:** 7/25/2006 8:00 AM

**Document:** EVCRM - MAIL - 060725 - We  
**Subject:** RightNow Regional User Group: Boston Area  
**Mailbox:** mkt\_outbound

**Proof List:** MKT - Proof - Garrett Stevens  
**Message:** First Proof of Boston User Gro  
 Send Proof on Save  
**Proof Results**

**Name:** \_\_\_\_\_ **Address:** \_\_\_\_\_  
**From:** \_\_\_\_\_  
**Reply-To:** \_\_\_\_\_

Save Cancel Spelling


User: Andrew Hull 8:05 AM



# Example Email

1. Personal
2. Relevant
3. Contextual images
4. Who, what, when, where
5. Text and image call-to-actions
6. CAN-SPAM compliant

[View this message](#) in your browser.



**SAVE THE DATE!**

*RightNow provides a strategic solution to drive superior customer experiences ...while dramatically reducing costs.*

**What**


[Resources](#)  
[Contact Us](#)  
[My Profile](#)  
[Send to a Friend](#)  
[Register Now!](#)

**Who**

**First Name Here**

Register today for the August 10, 2006, RightNow Regional User Group: Boston Area **Who**

**Location: Where**  
Netscout Systems  
310 Littleton Rd.  
Westford, MA 01886-4105



This customer-driven User Group will allow you to network, share best practices, and draw upon regional contacts to extend the value of your RightNow solution.

You will have the opportunity to:


- Network with RightNow customers
- Learn how your peers are using the RightNow solution
- Participate in discussions led by day-to-day users and administrators of RightNow solutions
- Engage a RightNow technical expert for answers to your specific questions

Walk away with actionable ideas that you can put into practice immediately!

**When**

**Date:** August 10th, 2006  
**Time:** Discussion begins at 9am.

**Graphical Registration Link**



Need more information, or would like to register? Visit the [event page](#) or contact Garrett Stevens at 406-522-1417 or [gstevens@riqtnow.com](mailto:gstevens@riqtnow.com).

Kind regards,  
RightNow Technologies

**RIGHT NOW TECHNOLOGIES**

**RIGHT NOW**  
TECHNOLOGIES  
RightNow Technologies, Inc.  
40 Enterprise Blvd.  
Bozeman, MT 59718

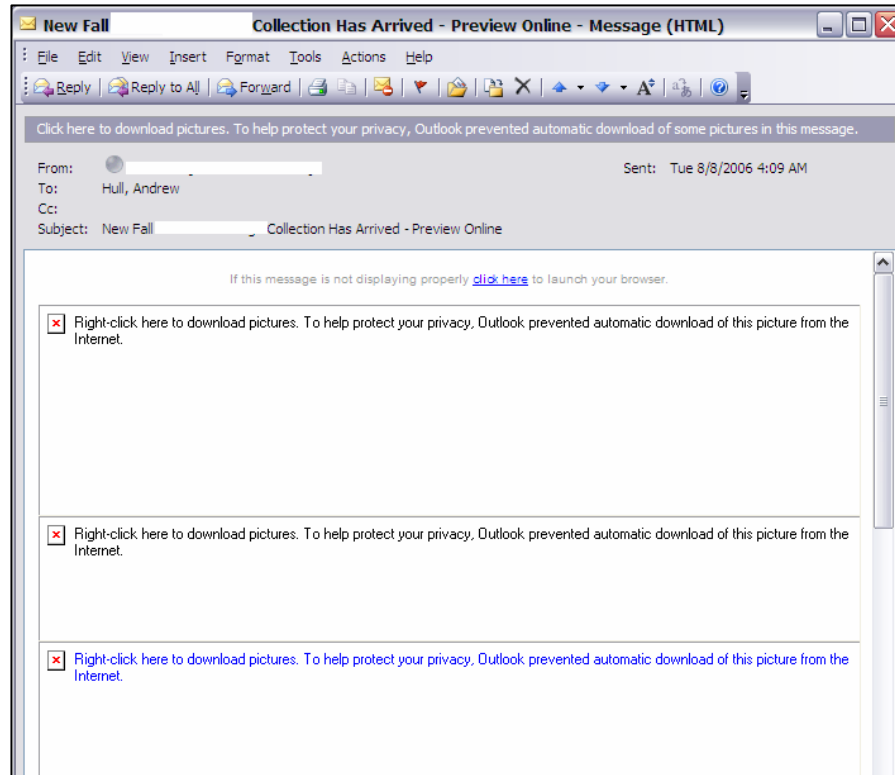
This message was sent to **Email Address Here**

**CAN-SPAM Compliant**

You received this message because you asked for information and/or updates from RightNow. If you received this information from a colleague, you are welcome to [subscribe](#). If you prefer not to receive communications from RightNow, you may update your profile to [unsubscribe](#). Read our [privacy statement](#) for more details.

Powered by **RIGHT NOW**

# Tip: Test Your Emails with Image Blocking Enabled



- Can your audience still understand your message?



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#1 Permission Based Email



#2 Website / Landing Pages

#3 Webforms / Conversion

#4 Confirmation Pages

#5 Transactional Follow-Up / Triggered Campaigns



## #2 Website and Landing Pages

- Send your audience to a dedicated landing page specific to your offer
- If not feasible, keep the principles of landing pages in mind when creating your web pages
- Landing Pages Best Practices
  - Remove navigation to avoid distraction
  - 1-2 call-to-actions (clear path to action)
  - Maintain campaign look and feel
  - Text based hyperlinks are important to test. Many times they will outperform graphic / image call-to-actions



# Dedicated Landing Page and Webform Example

- No Navigation
- No Scrolling
- Clear Offer
- Short Webform

Free Guide to Media and Publishing KPIs - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://www.websidestory.com/promotions/media/register.html?RT=23&SCMP=NLC-MARKETINGVOX&RA=MEDIA-D071306/> Go

**NEW TECHNOLOGIES NEED NEW METRICS. HAVE YOUR WEB ANALYTICS KEPT UP?**

Discover how easy it is to expand your online success metrics to include streaming media and mobile devices.

[Learn How With Our Guide To Online Publishing >](#)

**Download A Free Guide To Media & Publishing KPIs**

This free guide will show you how to:

- » Optimize streaming media campaigns
- » Better target mobile visitors
- » Increase web site stickiness
- » Boost advertising revenue

**Register Below To Download The Guide**

Your Name

Phone Number

Email Address

Company

Country

State / Province

**DOWNLOAD THE REPORT >**

Leading Media Companies Rely on WebSideStory

WEBSIDESTORY®

FOX Sports

KNIGHT RIDGER DIGITAL 20

VIACOM

WB

Comcast

Guardian

FOX NEWS channel

2006

# Hybrid – Web Page with Imbedded Offer

Web Self-Service from RightNow | RightNow Technologies - Microsoft Internet Explorer

Address: http://www.rightnow.com/products/selfservice.html

**RIGHT NOW** TECHNOLOGIES

HOME | CONTACT US | SEARCH | SUPPORT LOGIN

RightNow provides a strategic solution to drive superior customer experiences ...while dramatically reducing costs.

PRODUCTS & SERVICES | INDUSTRY | CUSTOMERS | PARTNERS | COMPANY | RESOURCES

**Featured Service White Paper**

**Great Expectations: Self-Service Success Can Happen**

New complimentary white paper by the Yankee Group **DOWNLOAD NOW!**

**RightNow® Web Self-Service**

Web self-service is an essential component of a great customer experience. Today's Internet-savvy customers want to be able to find answers to their questions on your company's web site 24 hours a days seven days a week without having to pick up the phone or wait for an email reply. And if they can't quickly find the information they're looking for, they'll be disappointed. They may also click their way over to a competitor's site!

RightNow pioneered web self-service and remains the unquestioned industry leader in this critical customer experience category. Our unique knowledge foundation, allows you to keep the information on your site complete and up-to-date without intense, time-consuming "knowledge harvests" that become obsolete as soon as they're completed. And our advanced heuristics enable your site to continuously "learn" what your customers really need, so that you can answer an ever-higher percentage of your customers' questions online without any human intervention. In fact, many RightNow users have achieved self-service success rates as high as 99 percent.

Product & Services Overview  
All Products  
Service & Support  
**Web Self-Service**  
Core Knowledge Management  
Email Response Management  
Call Tracking  
Telesales  
Surveys  
Web Site Indexing  
Live Chat Software  
Self-Advisor  
Proactive Service and Top-Line Service  
Pilot Program  
Locator  
Voice  
Marketing Automation  
Sales Automation  
Professional Services  
Analytics  
Optimize Customer Experience

**Insider's Guide to Customer Service on the Web**  
DOWNLOAD

Trusted sites



# #3 Webforms

- Clear offer
- Clear process
- Form above fold
- Test webforms with and without website navigation

Turning Customer Experiences into Competitive Edge | RightNow Technologies - Microsoft Internet Expl...

File Edit View Favorites Tools Help

Address [http://rightnow.custhelp.com/cgi-bin/rightnow.cfg/php/enduser/doc\\_serve.php?2=WPCS-FORM-GreatExpectations](http://rightnow.custhelp.com/cgi-bin/rightnow.cfg/php/enduser/doc_serve.php?2=WPCS-FORM-GreatExpectations) Go Links

HOME | CONTACT US | SEARCH | SUPPORT LOGIN

**RIGHT NOW**  
TECHNOLOGIES

*RightNow provides a strategic solution to drive superior customer experiences ...while dramatically reducing costs.*

PRODUCTS & SERVICES | INDUSTRY | CUSTOMERS | PARTNERS | COMPANY | **RESOURCES**

## Great Expectations: Self-Service Success Can Happen

by Sheryl Kingstone, Yankee Group

With continued demand for self-service capabilities, companies need to evaluate newer technologies to meet the needs of sophisticated customers. The ultimate goal of self-service is to enhance the customer experience by delivering immediate relevant information, facilitating a much quicker, better experience for customers.

This white paper will help you avoid critical, time-consuming and costly mistakes and ensure that the self-service model your business adopts will be an integral part of your entire customer care initiatives.

The white paper you are requesting will be sent immediately **via email** after you complete the form below. RightNow Technologies respects your personal information and promises to keep it confidential. Read our [privacy policy](#) for more information.

**JUST 3 EASY STEPS:**

**1 Step 1:** \*denotes required fields

\*First Name

\*Last Name

\*Email

**2 Step 2: Select Options**

**Describe your project:** (Click all that apply)

Actively evaluating vendors

Determining if there is a need

Trusted sites

# Example Webform

- No scrolling / Limited scrolling
- Clear 3-step process
- Clear offer to opt-in

**Yankee Group: Customer Relationship Management Report**

The report you are requesting will be sent immediately **via email** after you complete the form below. RightNow Technologies respects your personal information and promises to keep it confidential. Read our [privacy policy](#) for more information.

**JUST 3 EASY STEPS:**

**1 Step 1:** \*denotes required fields

\*First Name: Andrew  
\*Last Name: Hull  
\*Email: andrew.hull@rightnow.com  
(the information you are requesting will be sent via email)  
\*Company: RightNow  
\*Phone: 406-522-4229  
(please no 800 #'s)  
\*Country: US  
\*Address: 40 Enterprise Blvd  
\*City: Bozeman  
\*State/Province: MT  
\*Zip/Postal: 59718  
\*Industry: High Tech (HW / SW)  
\*Department: Marketing  
\*Title: Manager  
\*What is your organization's annual revenue?: \$50M - \$150M

**2 Step 2: Select Options**

**Describe your project:** (Click all that apply)

Actively evaluating vendors  
 Determining if there is a need  
 Researching solutions on behalf of a client  
 No project identified

**Additional Offer:**  
RightNow offers exclusive white papers, industry reports, case studies and timely invitations to webcasts and events.

I would like to receive ongoing communications from RightNow!  
(You can always change your mind later!)

[RightNow Technologies Privacy Policy](#)

**3 FINAL STEP:** Submit Request

© 2006 RIGHTNOW TECHNOLOGIES, INC. [PRIVACY POLICY](#) [ANTI-SPAM POLICY](#) [SITE MAP](#)

# 5 Ways to Promote a Great Customer Experience Through Email Marketing

#1 Permission Based Email

#2 Website and Landing Pages

#3 Webforms / Check Out / Conversion

Improving Your Customer's Experience

#5 Transactional Follow-Up / Triggered Campaigns

#4 Confirmation Pages



# #4 Confirmation Page

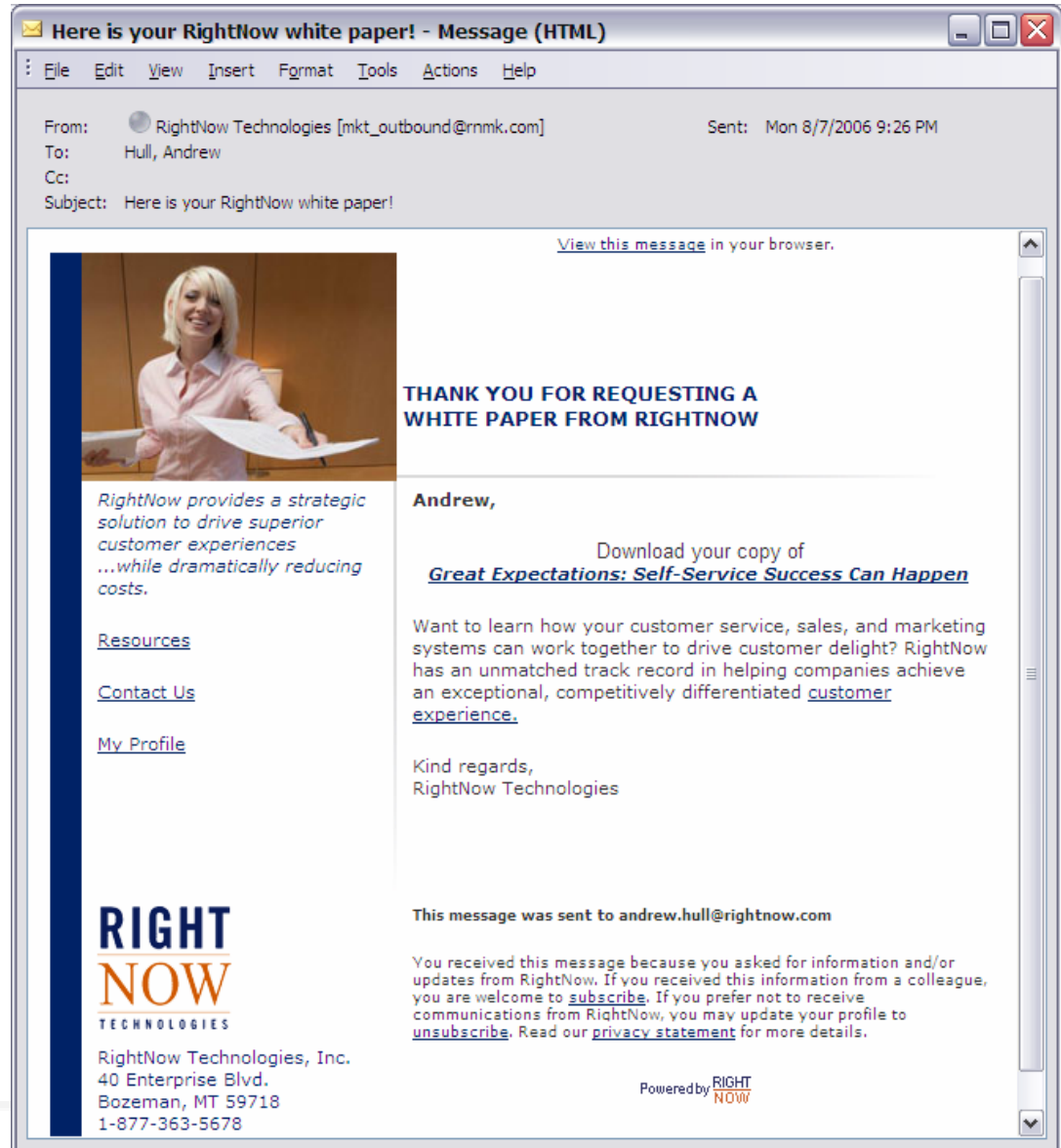
- Personalize
- Confirm action
- Deliver offer or clearly explain next steps
- Offer navigation so visitor continues to browse website

The screenshot shows a web browser window displaying a confirmation page from RightNow Technologies. The browser's address bar shows the URL: [http://rightnow.custhelp.com/cgi-bin/rightnow.cfg/php/enduser/doc\\_submit.php](http://rightnow.custhelp.com/cgi-bin/rightnow.cfg/php/enduser/doc_submit.php). The page header includes the RightNow Technologies logo and navigation links: HOME, CONTACT US, SEARCH, and SUPPORT LOGIN. A tagline reads: "RightNow provides a strategic solution to drive superior customer experiences ...while dramatically reducing costs." Below the header is a navigation menu with links for PRODUCTS & SERVICES, INDUSTRY, CUSTOMERS, PARTNERS, COMPANY, and RESOURCES. The main content area is personalized for a user named Andrew, starting with "Andrew," and "Thank you for your interest in RightNow!". It then states: "Leading the industry beyond CRM to high impact customer experience management solutions, our products and services help organizations like yours drive a superior customer experience across the frontlines of your business." A small thumbnail image of a white paper is shown next to the text: "Download the [Great Expectations: Self-Service Success Can Happen](#) white paper." Below this, it says: "In addition, the [Great Expectations: Self-Service Success Can Happen](#) white paper has been sent to you at [andrew.hull@rightnow.com](mailto:andrew.hull@rightnow.com). (If your email address is associated to a mobile device, please [update your preferences](#).)" Further down, it says: "Visit our [Resource Center](#) for more information." and "Contact us today to speak to a Business Development Representative to discover how your business can drive superior customer experiences while dramatically reducing costs." At the bottom, it provides a phone number: "Or, call us directly. In North America at 1-877-236-3174, or internationally at +1-406-522-4200." The browser's status bar at the bottom right shows a "Trusted sites" icon.



# Confirmation Email

- Immediate
- Personal
- Relevant
- CAN-SPAM Compliant



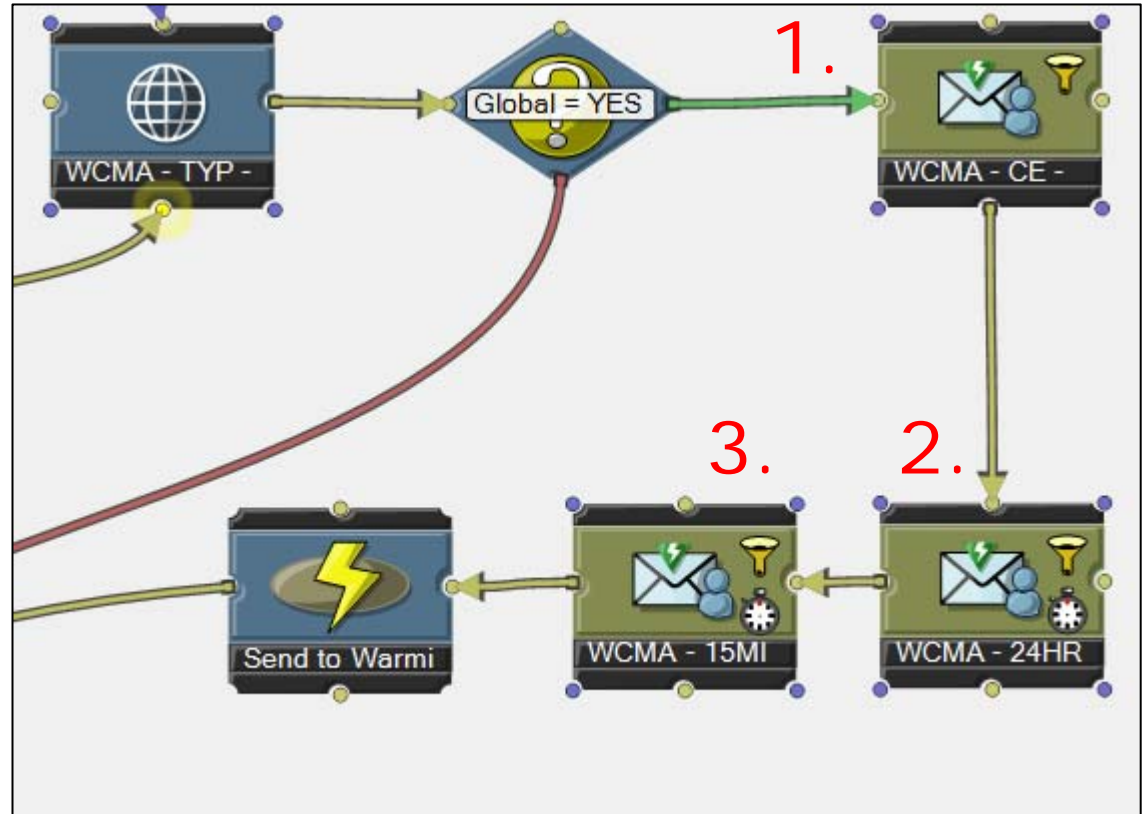
# Leverage the Power of Triggered Campaigns to Increase Your Marketing Impact

- Automatically communicate transactional events in an intelligent, customer friendly way
  - Order confirmations
  - Ship confirmations
  - Reminders for events
  - Warranty expirations
  - Etc...
- Would emails sent at the right time with relevant information improve your customer's experience with your company?

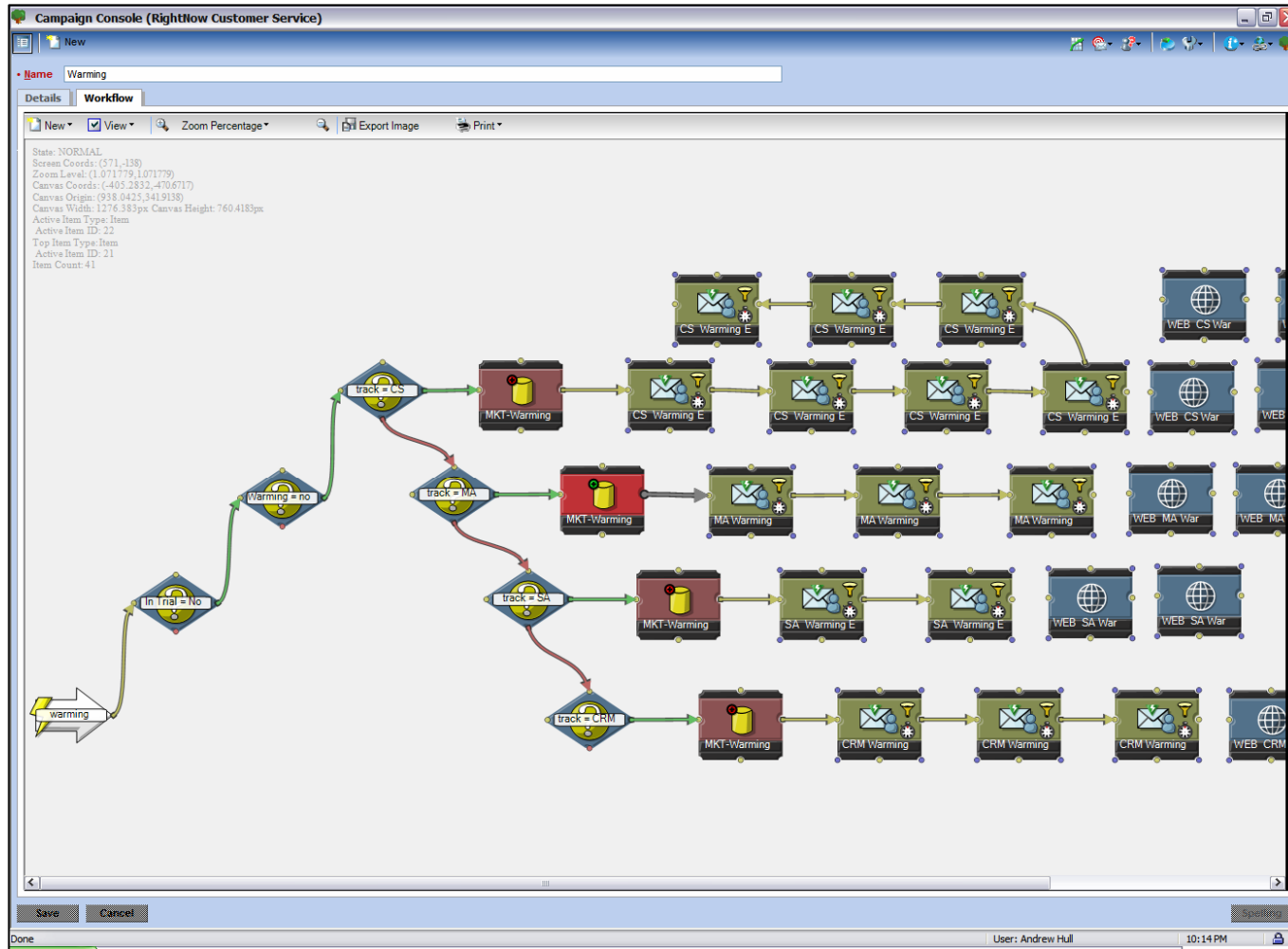


# Webcast Campaign Example

1. Registration confirmation
2. 24 hr reminder
3. 15 min reminder
4. Thank you for attending
5. Sorry we missed you



# Advanced Example: RightNow's Follow-Up Process for Opt-In Visitors



# Promoting a Great Customer Experience with Email Marketing

- Evaluate your email marketing efforts through the eyes of your prospect and customers
  - Are your customers and prospects receiving a consistently exceptional customer experience?
  - Does your email, website, landing pages, webforms, confirmation pages and transactional emails provide a consistent brand experience?



# 5 Ways to Promote a Great Customer Experience Through Email Marketing

#1 Permission Based Email


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#5 Transactional Follow-Up / Triggered Campaigns

Improving Your Customer's Experience



```
graph TD; A[Improving Your Customer's Experience] --> B[#1 Permission Based Email]; B --> C[#2 Website and Landing Pages]; C --> D[#3 Webforms / Check Out / Conversion]; D --> E[#4 Confirmation Pages]; E --> F[#5 Transactional Follow-Up / Triggered Campaigns]; F --> A;
```

# Resources

- User Conference Breakout Sessions
  - RightNow Marketing 8: A First Look
  - RightNow Feedback: Listening to Your Customers
  - Marketing Metrics That Matter
  - Tips and Tricks from RightNow's Marketing Team
- Web Resources
  - [www.marketingsherpa.com](http://www.marketingsherpa.com)
- Tutorials
  - [http://www.rightnow.com/rntdocs/tutorials/7.5/ma/ma\\_user/user\\_links.php](http://www.rightnow.com/rntdocs/tutorials/7.5/ma/ma_user/user_links.php)

