

# RightNow Service 8™: A First Look

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# Agenda

- RightNow 8 Overview
- RightNow Service 8
  - What's New
  - Product Demo
- Multi-channels
- Q&A



# RightNow 8 Overview

*Designed to deliver superior customer experiences...*

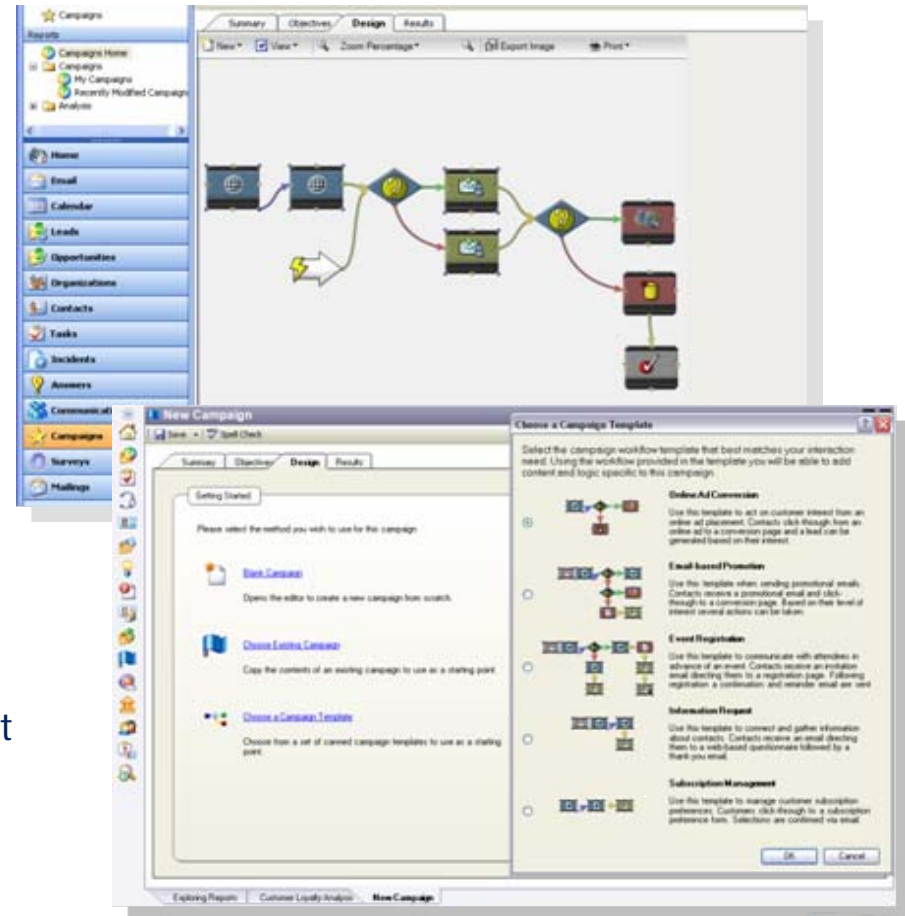
- Customer Experience Designer™
- RightNow Feedback™
- RightNow Analytics™
- Workspace Designer
- Enterprise On-Demand Architecture



# Customer Experience Designer™

*Conceptualize, design and deliver unified customer experiences...*

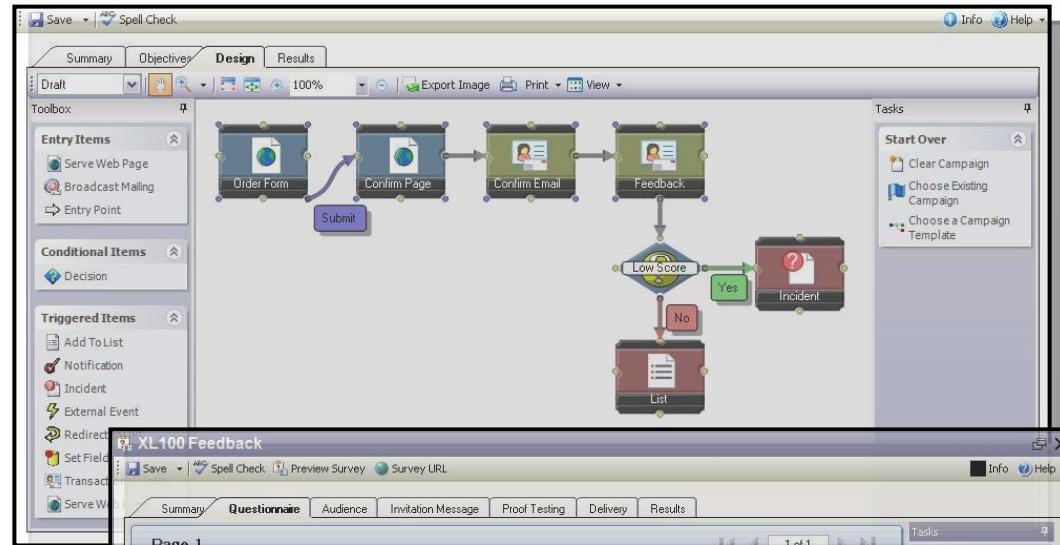
- **Graphical Workflow Engine**
  - Customer-initiated processes
  - Spans departments
  - Dynamic decisioning and content delivery
- **Process Management**
  - Service incident creation
  - Sales engagement
  - Lead creation
  - Online registration
  - Customer feedback and more...
- **Scenario Modeling**
  - New customer acquisition
  - Customer segmentation management
  - Complaint management
  - Offer management
- **Packaged business process templates**



# RightNow Feedback™

*Proactively sense and respond to the customer voice ...*

- **Capture feedback across all customer touch points**
- **Automate follow-up and analysis**
- **Pre-built feedback templates**
  - Customer advocacy management
  - Customer satisfaction monitoring
  - New product development
  - Employee feedback

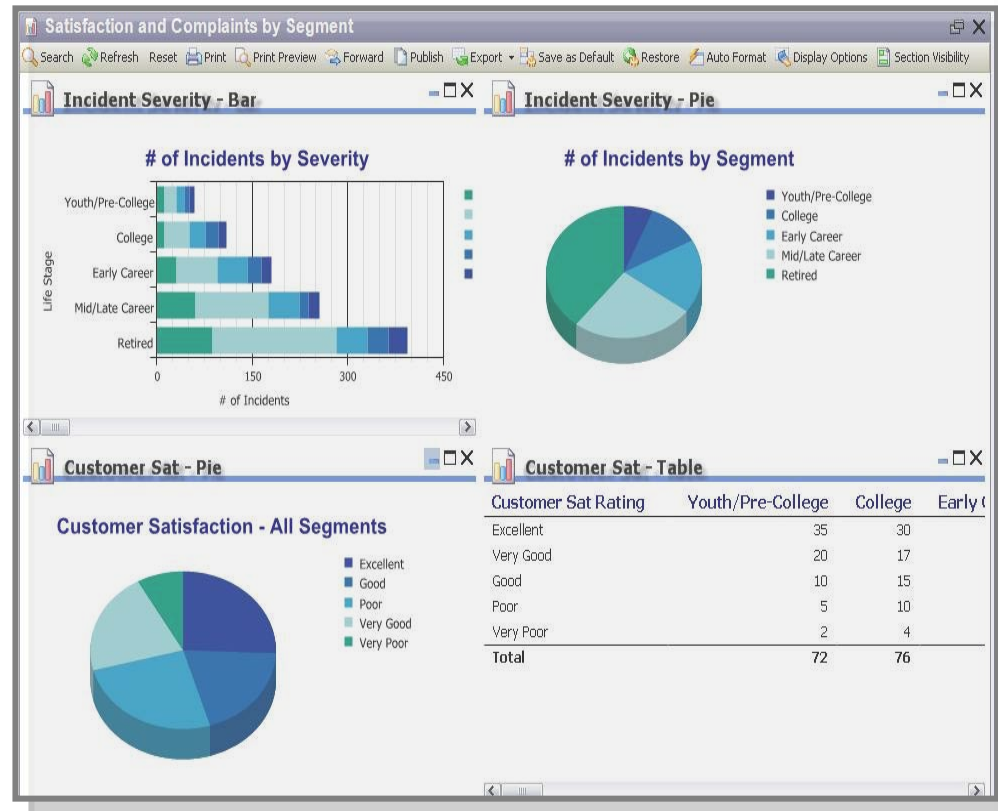


The screenshot shows the 'Questionnaire' tab of the RightNow Feedback survey template editor. The main workspace displays a survey page titled 'Page 1'. The survey content includes a 'Likely to Recommend' question: 'On a scale of 0 to 10, how likely are you to recommend the XL100 to a friend or relative?'. Below this is an 'XL100 Satisfaction' section with a question: 'How satisfied are you with the XL100?'. The response options are radio buttons for 'Delighted', 'Satisfied', 'Neutral', 'Dissatisfied', and 'Very dissatisfied'. Below that is an 'XL100 Satisfaction Factors' section with a question: 'What is the most significant factor influencing the answer you provided about your satisfaction level?'. The response options are radio buttons for 'Features', 'Design', 'State of the art technology', 'Ease of use', 'Help / technical support', and 'Other (please specify)'. The interface includes a 'Tasks' panel on the right with sections for 'Survey Tasks' and 'Page Tasks'. The bottom of the window shows 'Survey Template' and 'none' options.

# RightNow Analytics™

*Easily create tailored, actionable dashboards and reports ...*

- **Report Design Center**
  - Drag and drop report creation
  - Real-time preview
- **Customizable dashboards, reports and homepages**
  - Over 500 pre-built reports and dashboards
- **Historical trending**
  - Only on demand vendor delivering this capability



# Workspace Designer

*Exactly what you need, when and where you need it*

- **Role-based profiles**

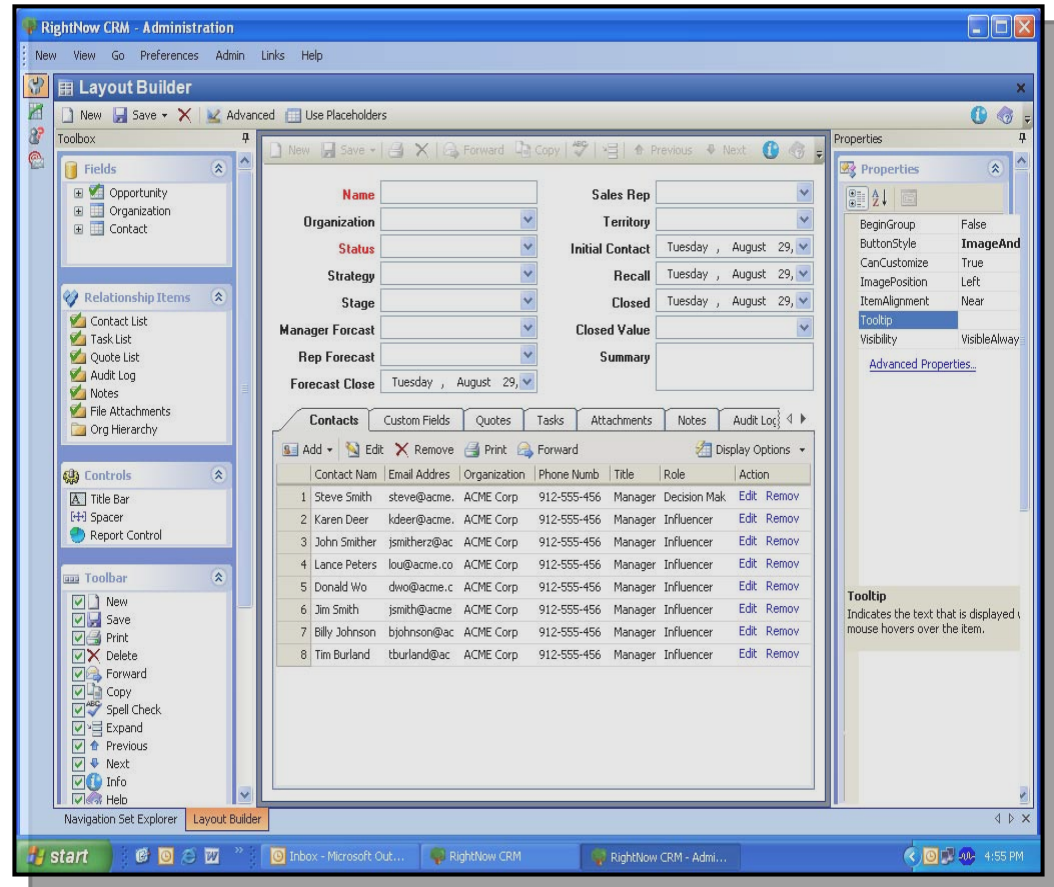
- Sales, Service, Marketing
- Executive, Manager, Rep

- **In-context analytics**

- Critical knowledge integrated into screens and processes

- **Drag-and-drop screen layout customization**

- Fields
- Tabs
- Integrations
- Toolbars
- Analytics
- Tasks



# Enterprise On-Demand Architecture

*Designed for mission-critical business environments...*

- Fast
- Easy to use
- Highly configurable
- Fully integrated with Microsoft Outlook®

The screenshot displays a CRM application interface. On the left is a navigation pane with options: Home, Calendar, Opportunities, Organizations, Contacts, Tasks, Incidents, Answers, Campaigns, Surveys, Outbound Email, Content Library, Audiences, and Analytics. The main window is divided into three sections:

- Calendar:** Shows a calendar for July 2005.
- My Opportunities:** A table listing various business opportunities with columns for Name, Organization Name, Contact, Stage, Forecasted Value, and Forecasted Close.
- Opportunity Name:** A detailed view of the 'Q3 Integration Project' opportunity, including fields for Name, Organization, Status, Strategy, Stage, Manager Forecast, Rep Forecast, Forecast Close, Sales Rep, Territory, Initial Contact, Recall, Closed, Closed Value, and Summary.

Name	Organization Name	Contact	Stage	Forecasted Value	Forecasted Close
1 Phase 2 expansion	Centennial Homes	Janice Trudy	Demo	\$800,000	7/30/2004
2 Trouble Ticketing	Centennial Homes	Janice Trudy	2 Partner Recvd (5%)	\$475,000	7/30/2004
3 Business Upgrade	Western Energy Alliance	Scott Winder	Evaluation (40%)	\$650,000	6/30/2004
4 Subscription Renewal	Simmes Construction	Jack Helting	5 Recvd Order (100%)	\$850,000	6/30/2004
5 Q3 Integration Project	Delta Graphics and Signes	Trent Purdy	2 Qualified (5%)	\$700,000	7/30/2004
6 Expansion Services	Delta Graphics and Signes	Trent Purdy	5 Approved (85%)	\$685,000	7/30/2004
7 ISP Initial	Rip Communication	Jim Wheeler	3 Pipeline (20%)	\$190,000	7/23/2004
8 Installation	Blue Electronics	Kip Steeler	Evaluation (40%)	\$500,000	7/30/2004
9 UAP Upgrade	Kepling Design	Cynthia Williams	Keep in rep pipeline	\$400,000	7/30/2004
10 Wireless installation	Madison Furniture	Jared Thompson	4 Negotiating (60%)	\$680,000	7/30/2004
11 Service Solution	Madison Furniture	Jared Thompson	Verify Cash	\$930,000	7/30/2004

Field	Value
Name	Q3 Integration Project
Organization	Delta Graphics and Signes
Status	Active
Strategy	Direct Sales
Stage	2 - Engaged
Manager Forecast	10,000.00
Rep Forecast	10,000.00
Forecast Close	Friday, September 29, 2006
Sales Rep	Peter Grist
Territory	Northeast
Initial Contact	Tuesday, August 01, 2006
Recall	Tuesday, August 29, 2006
Closed	Friday, October 27, 2006
Closed Value	15,000.00
Summary	Integration of billing system with front-office system.

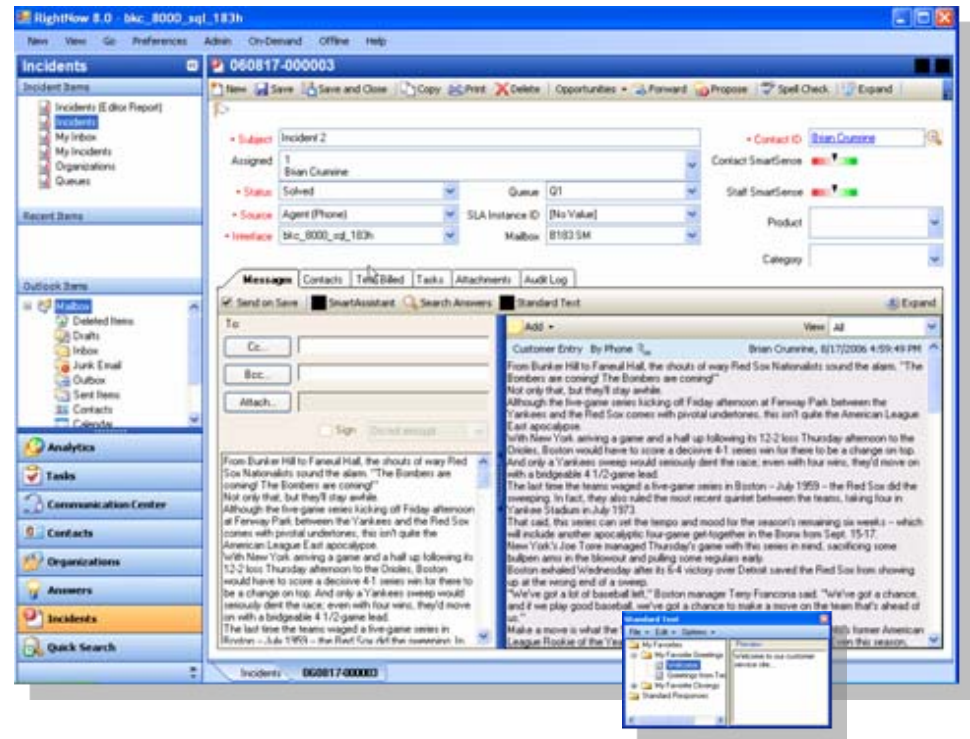


# RightNow Service 8



# RightNow Service Enhancements

- New, consolidated agent desktop
- Customizable contact center business processes
- Improved Incident Management, including sub-tasks
- Re-designed Answer Management, including sub-tasks
- Embedded Analytics
- New Communications Center



# Redesigned Incident Management

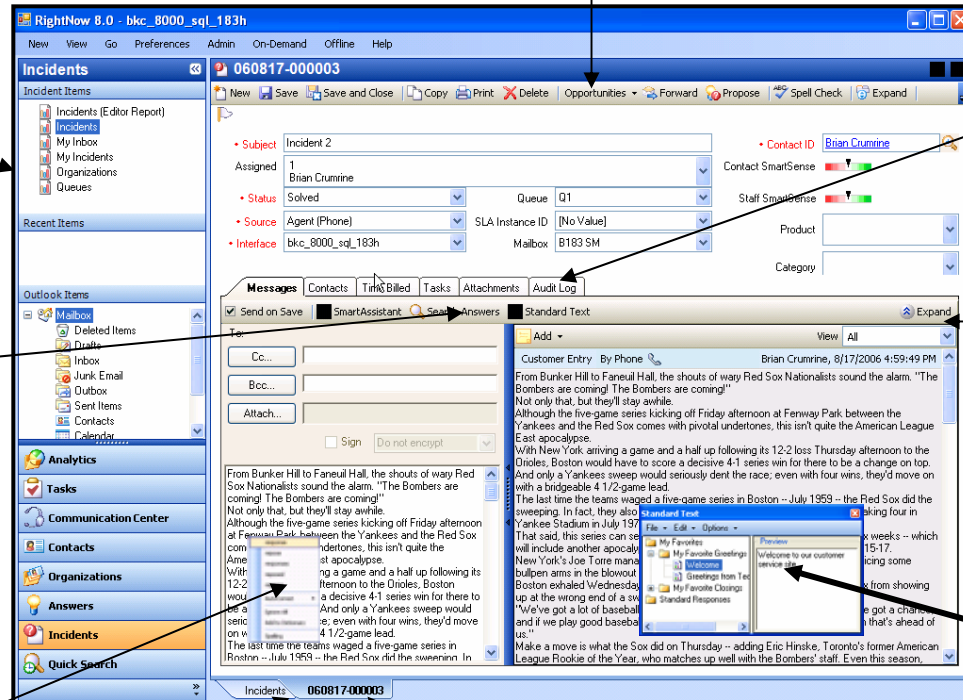
Quickly access Offer Advisor or create an opportunity

View incidents by status or assignment; view incident reports

Create custom tabs to access other applications

Easy access to SmartAssistant®, KB Search

Expand message area to full screen



On-the-fly spell check works exactly like MS Word

Quickly switch between multiple incidents using tabs

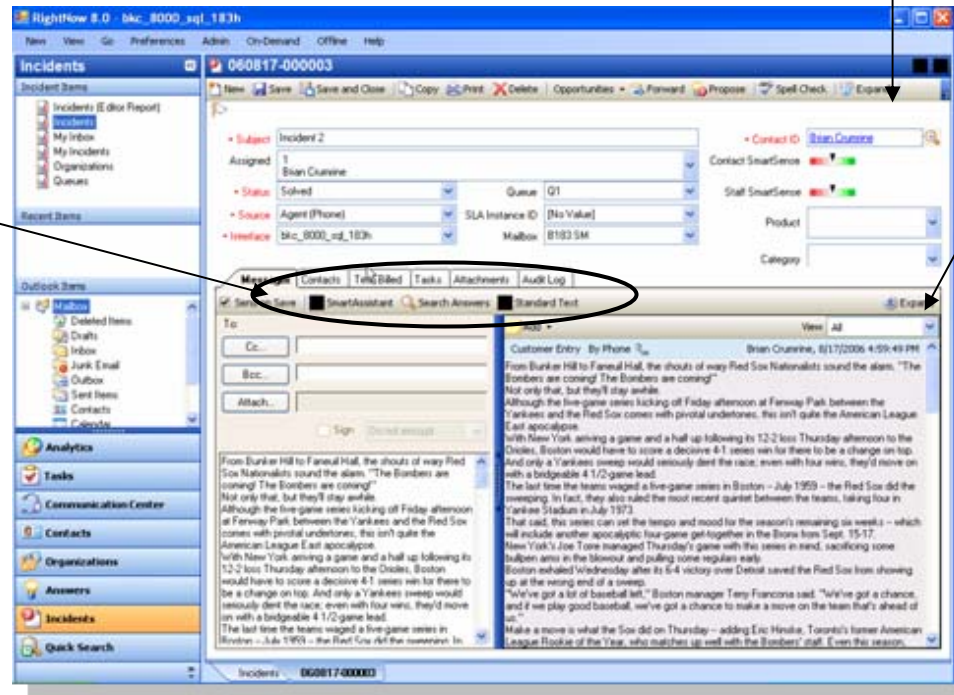
Standard text can optionally stay on top for easy access



# Incident Workflow

Drag-drop tabs to manage workflow

Scroll/tab view

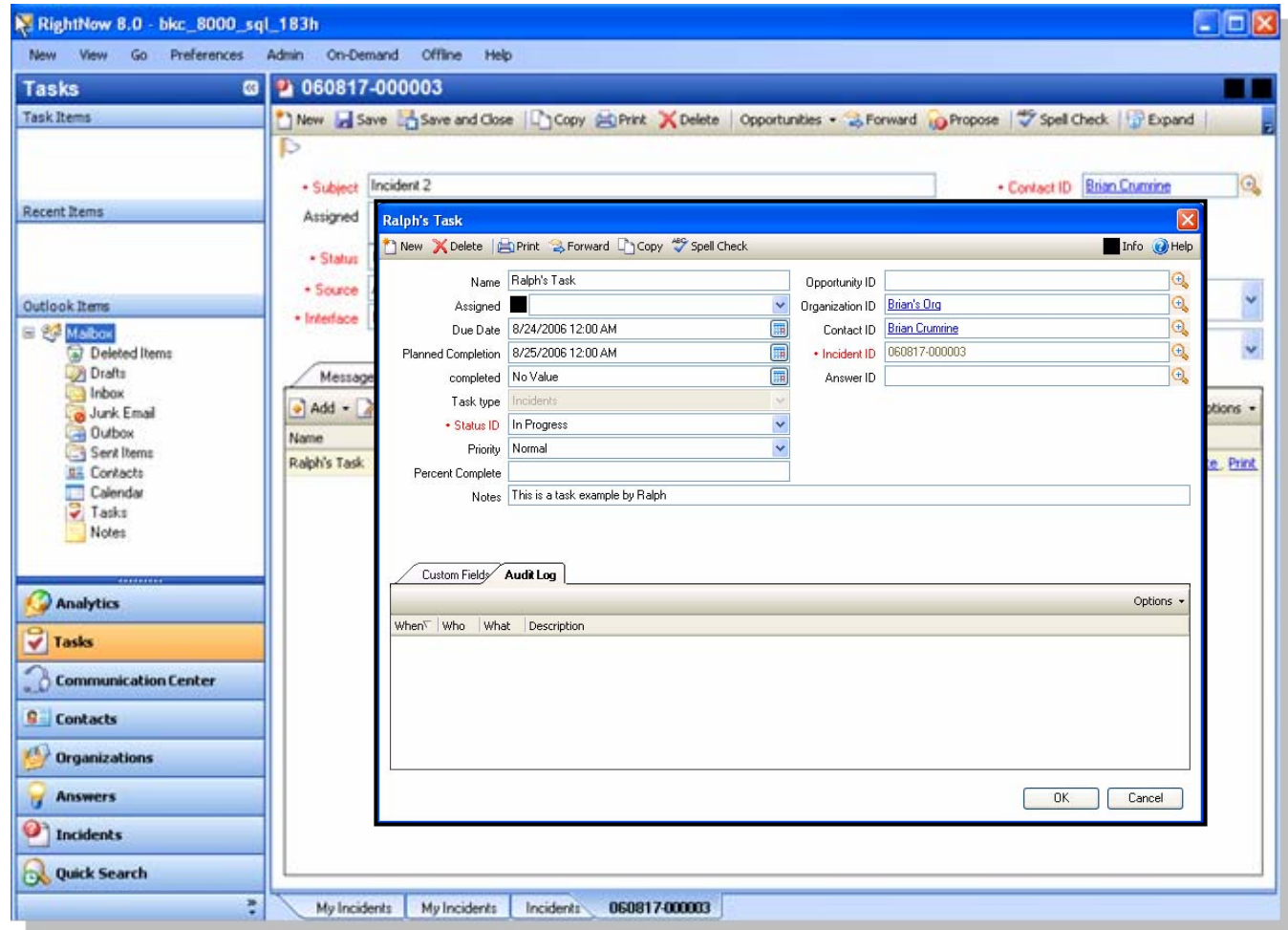


Rules now have If-then-"else" for easier creation



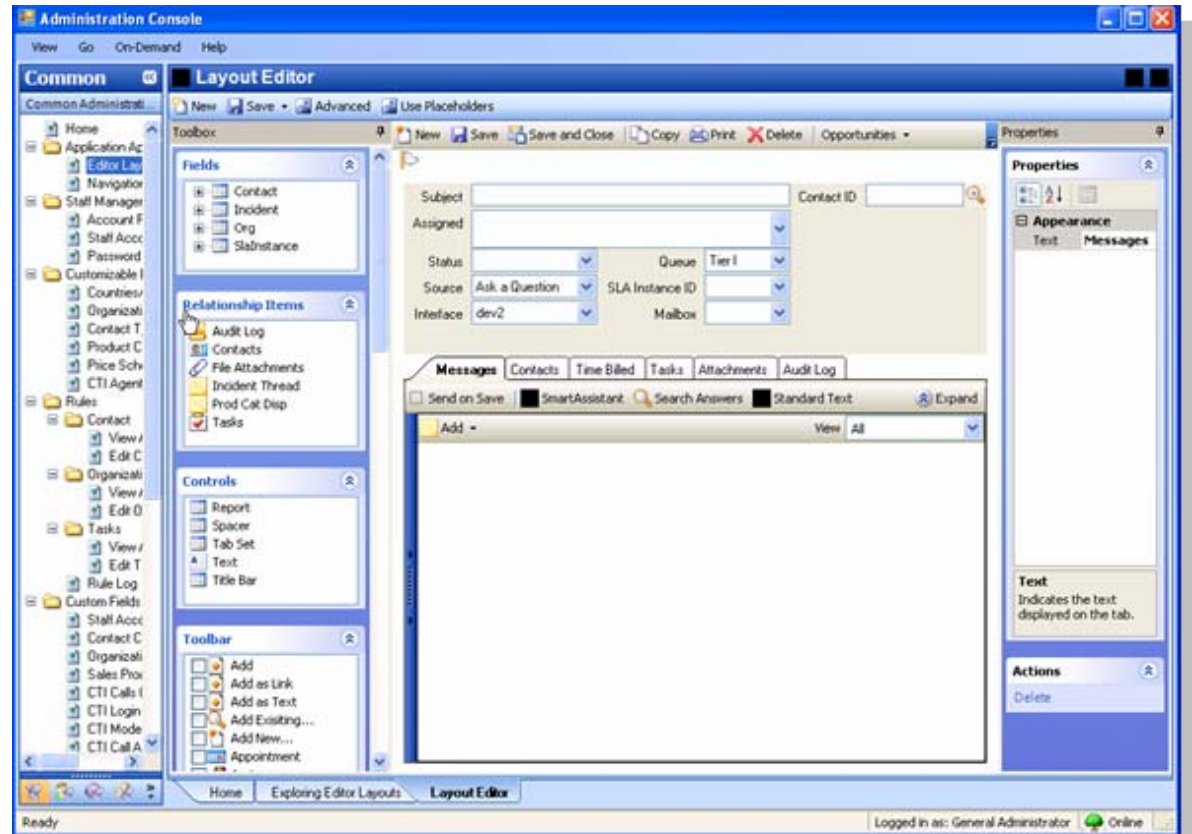
# Incident's Task tab

- Additional level of workflow
- Reusable
- Different assignment



# Customizable Agent Desktops

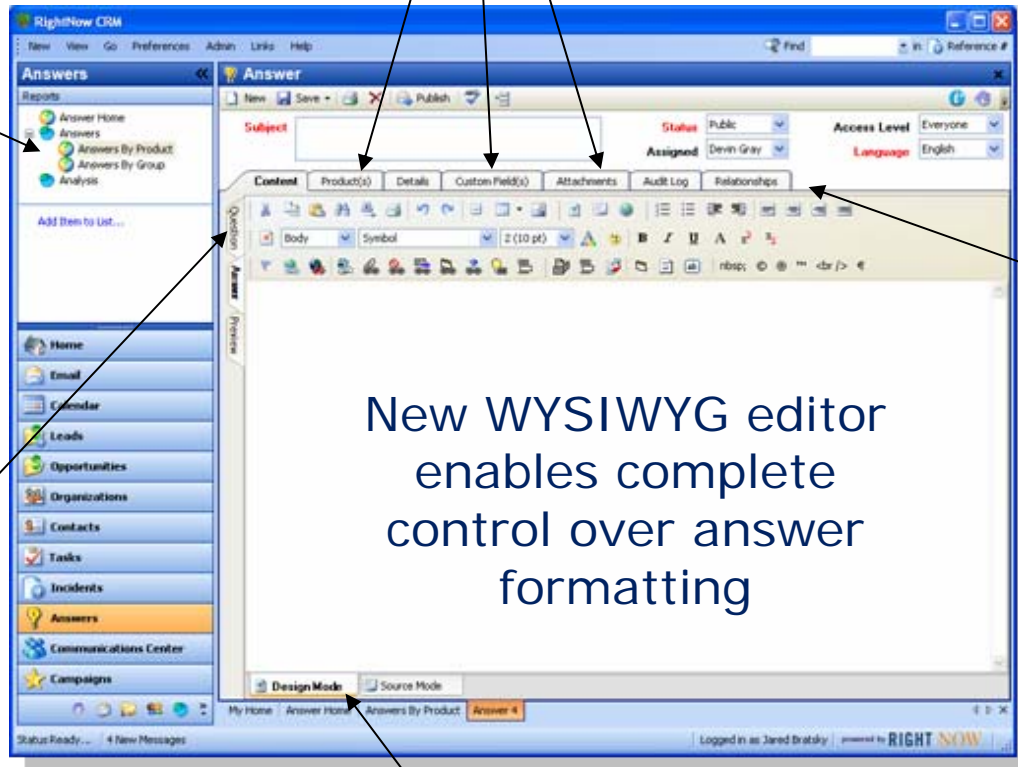
- Drag-drop UI
- Copy and modify
- Create new
- Many properties
- Profile assignment



# Redesigned Answer Management

Easily accessible answer details such as related products and custom fields

View answers by product or group; view answers reports



Question, answer and preview tabs

New WYSIWYG editor enables complete control over answer formatting

New relationships tab replaces meta-answers

Quickly switch between design and source mode



# Answer Details

- Single answer information on one screen
  - Modify detail screen by adding/replacing report

The screenshot shows the RightNow CRM interface for an 'Answer' record. The main form includes fields for Subject, Status (Public), Access Level (Everyone), Assigned (Devin Gray), and Language (English). Below the form are two reports: a Notification Report and a Keyword Search Report.

Notification Report					Keyword Search Report		
First Name	Last Name	Company Ass	Email Address	Time Remain	Phrase Stem	Search Count	Answers
Michael	Bailey	Datamall Ltd	michael.bailey	365d 0h 0m	UPGRAD	134	127
Francisco	Becerra	Outsourcing L	becerra@outs	365d 0h 0m	MANUAL	89	105
Janet	Botnen	State of Wash	janet.botnen	365d 0h 0m	DOCUMENT	52	91
Chelsea	Bucoy	MarketTools	chelsea.bucoy	365d 0h 0m	7.5	45	17
Wendy	Cooper	Australian Pes	wendy.cooper	365d 0h 0m	SMART ASSIST	45	111
Sam	Deen	RightNow Tec	sdeen@righn	365d 0h 0m	INTEGR	44	38
Su-Ching	Fong	Swinburne Uni	sfong@group	365d 0h 0m	REPORT	43	203
Mike	Foster	RightNow Tec	mfoster@righ	365d 0h 0m	SYSTEM REQUIR	41	394
Julie	Foster	Montana Jobs	jmfoster@mo	365d 0h 0m	BEST PRACTIC	40	57
Jim	Kelly	MarketTools	jkelly@diag	365d 0h 0m	CBT	35	7
Sayam	Khan	Boxwood Tec	skhan@boxwo	365d 0h 0m	ACTIV	32	98
Mark	Kulg	Sensis	mark.kulg@s	365d 0h 0m	RULE	32	159
Miles	Lasater	Higher One, I	milasater@hig	365d 0h 0m	SLA	31	21
Brian	Leonardo	State of Wash	brian.leonardo	365d 0h 0m	ENDUS CSS	31	380
Shane	McKee	Air New Zeala	shane.mckee	365d 0h 0m	HTML	30	93
Gerald	Pickett	RightNow Tec	gpickett@righ	365d 0h 0m	CSS	29	14
David	Webb	Toshiba	david.webb@t	365d 0h 0m	CUSTOM TAB	29	611
					API	28	12



# Answer Relationships

- Relationships replaces meta answers
- Siblings inherit product/categories associations and attachments
  - Permissions and languages remain separate
- Manually create answer relationships
- Manage learned linked answers
  - Promote linked answers to manual
- Answer types
  - Test/HTML (today's type)
  - URL
  - File attachment

Answer ID	Summary	Date Created	Access Level	Status	Language	Assigned
52	Troubleshooting your	04/12/2005 05:46 P	Gold	Public	English (US)	Willie Ede
53	Troubleshooting your	04/12/2005 05:46 P	Silver	Public	English (US)	Willie Ede
54	Troubleshooting your	04/12/2005 05:47 P	Bronze	Public	English (US)	Willie Ede
45	Troubleshooting your	04/12/2005 05:47 P	Everyone	Public	English (US)	Willie Ede



# Service Analytics Dashboards & Reports

## Dashboard examples: 15 total

- Executive Overview
- Customer Satisfaction
- Operations Overview
- Telephone Operations
- Email Operations
- Chat Operations
- Employee Management
- Knowledge Gaps
- Publishing

## Report examples: 76 total

- Customer Satisfaction
- Response Rate Statistics
- Service Summary
- Personnel performance
- Chat activity



# Communication Center

- Channels in one screen
- Channel activity information
- Consistent CTI toolbar access in appropriate screens
- Notification management
- Toast notification

The screenshot displays the 'Communications Center Home' interface. At the top, there is a 'Notifications' window with a table listing recent events:

Who	Type	Message	When
Matthew Kauffman	Incident Assigned	This is the subject of the incident	9/13/2005 11:33:55 AM
Willie Eide	Contact Updated	Contact: Gregory Allen	9/13/2005 11:32:45 AM
Willie Eide	Answer Assigned	This is the subject line of Answer #1234	9/12/2005 5:24:44 PM
Mike Myer	Incident Assigned	This is the subject of the incident	9/12/2005 12:35:00 AM
Julie Kmetzo	Incident Assigned	This is the subject of an opened incident notificat	9/12/2005/ 11:32:00 AM

In the center, a dialog box titled 'Ralph Test task to manage answers' is open, showing fields for Name, Assigned (JR Sanchez), Due Date, Planned Completion, Task type, Status ID, Priority, and Percent Complete. It also includes a 'Notes' section with a text area containing a test message.

At the bottom right, a 'Coming call' toast notification is visible, displaying the contact name 'Matthew Kauffman' and a link to 'Answer'.



# What is RightNow Voice™?

**A portfolio of voice-enabled CRM applications**



1. Voice Interface to Knowledge Base
2. Voice Interface to Incident Management
3. Voice Interface to Locator
4. Status Applications: (Order, Rebate, Repair)
5. Password Reset
6. Survey
7. One Number Routing

***Handles both the informational and transactional type calls***



# RightNow Live

- Existing Chat launched from RightNow 8 console
  - Scalable
    - Built external queuing
    - Exceeds 800 concurrent chat sessions
  - New Reports
- Enhanced Chat will ship after RightNow 8
  - Architected for scalability and performance
  - New Reports
  - Fully integrated

Chat Agent Console

Powered by RightNow

Agent	Active Sessions	Idle Sessions	Average Handle	Average Response	Chats Per Hour	Last Update
admin	1	0	0:00	0:00	0	3:46:26 PM

User Information

Matthew

First Name: Matthew (listening)  
 Last Name: Kauffman  
 Email Address: mkauffman@email.com  
 Operating System: Windows XP  
 Browser: IE 6.0 (Java 1.5.0\_06), en\_US

Duration: 4:11    admin    Matthew

[00:00:00] admin: Hi, my name is admin. How may I help you?  
 [00:03:57] Matthew: My camera seems to be out of focus all of the time

Type your message here, then click Send or press <Enter>

Type URL to be pushed here, then click Send or press <Enter>

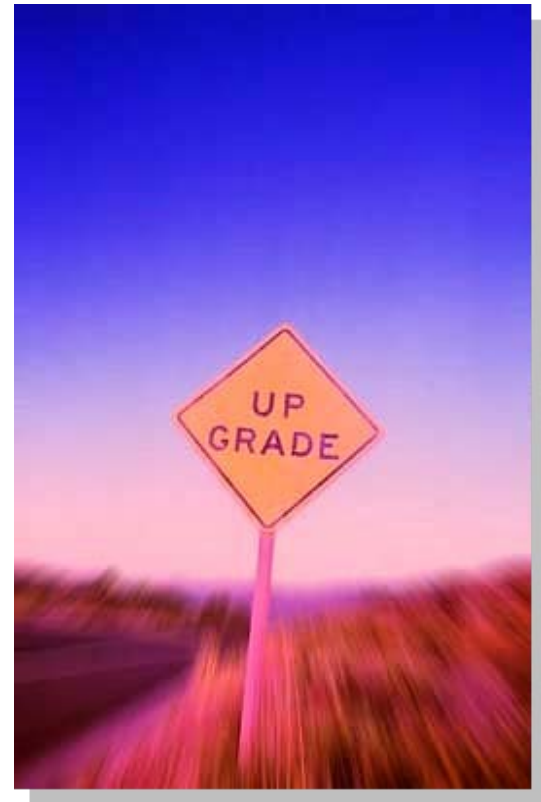
Queue	Real-time System Stats					Cumulative System Stats (Last 30 minutes updated every minute)						
	Agents Online	Idle Sessions	Users Chatting	Users Waiting	Longest Wait	Service Level < 20 Sec Wait	Average Wait	Average Response	Average Handle	Calls Handled	Calls Abandoned	Last Update
RightNow Live Default Queue	1	0	0	0	0:00	0.0%	0:00	0:00	0:00	0	0	3:46:00 PM
Queue1	1	0	1	0	0:00	0.0%	0:50	0:00	0:00	0	0	3:46:00 PM
Queue2	1	0	0	0	0:00	0.0%	0:00	0:00	0:00	0	0	3:46:00 PM
Queue3	1	0	0	0	0:00	0.0%	0:00	0:00	0:00	0	0	3:46:00 PM
Entire System	1	0	1	0	0:00	0.0%	0:50	0:00	0:00	0	0	3:46:00 PM

Chat Console    New Contact



# Preparing for RightNow 8

- Get to 7.5.2 or later
- Follow the same HMS/UMS process
- Review the SmartConversion Guide
- Review your test site completely
- Focus on screen layouts and reports (Views)
- Train your users



# Questions?

## Recommended sessions

- The Basics: Introduction to Knowledge Base Management – Tuesday at 11:30
- Achieving Service Excellence Through Multiple Channels – Tuesday at 1:45
- Fine-Tuning Your RightNow Knowledge Base – Tuesday at 3:30
- Using Service Analytics to Drive Superior Performance – Wednesday at 1:00

