Business Rules: Processes and Policies for a Great Customer Experience

Jennifer Hermesmeyer

Education Services Manager

RightNow Technologies

Agenda

- How business rules make a difference in your customer's experience? Let's talk.....
- Back to the basics – what you need to know to write effective business rules
  - Mapping business process
  - Structuring rules
  - Effective transitions
- Meaningful escalation that drives results
- Using rules to set customer expectations
- Best practices
- For more information....

How Rules Shape Customer Experience

- They are the backbone of the system – without them, it's chaos!
- Auto respond to questions submitted
- Filter SPAM
- Suggest solutions before someone submits an incident
- Set field values for incidents, contacts, organizations
- Ensure no incident goes unassigned
- Automate your answer publishing process
- Notify a staff member when an incident is proposed as an answer
- Set customer expectations for the level of service they will receive

But wait, there's more!

- Page or send alerts to people!
- Send auto-responses to a customer after a certain amount of time
- Create sales opportunities or launch marketing campaigns in RightNow!
- Apply Service Level Agreements to contacts, organizations or incidents
- Reroute incidents to other staff members
- PROVIDE KNOWELDGE AT THE POINT OF ACTION

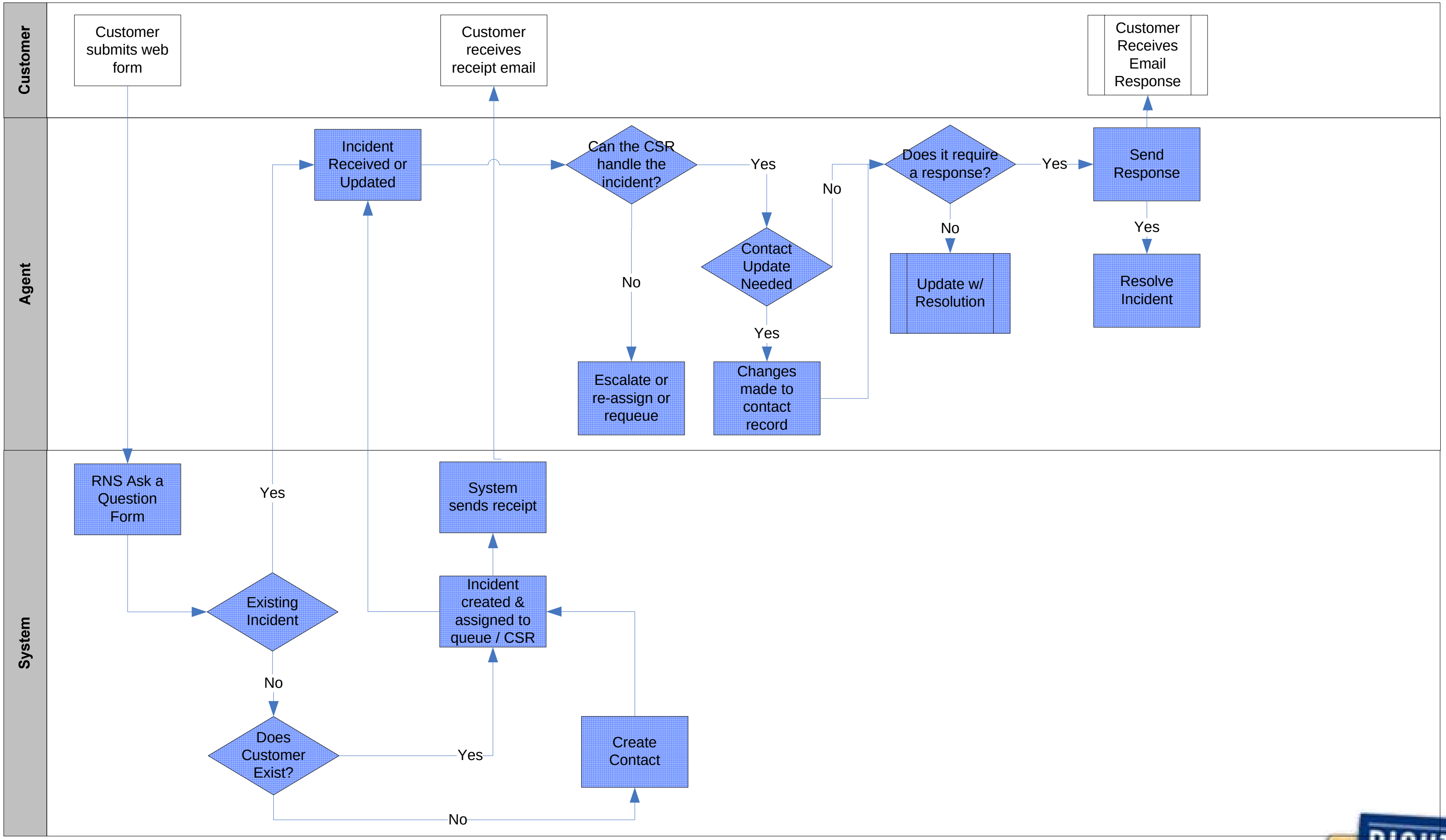
Back to Basics – Rules 101

- Planning
- Rule Definitions
- States
- Escalations
- Functions
- Rule Management
- Best Practices
- Resources

Steps to Successful Rule Management

- If you're new customer or a new Administrator, attend Product Overview Training!
- Plan before you configure
- Plot and evaluate your internal business processes
  - What are your business goals?
  - How will your incidents be routed?
  - Who needs to be notified in which situations?
  - What is your escalation process?
- Map the lifecycle of the incident using real case scenarios from your business
- Track the process
  - Use a tool such as Visio or Excel to map
  - Can easily make adjustments before configuring

Sample Visio Diagram



Excel Plan

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	**Disabled Rules**											Incident Values Checked			
2	**Duplicate Rules**														
3	**Rules**	**Incident Interface**	**Incident Type**	**Incident Product**	**Incident Category**	**Incident Incident Type**	**Incident WinBack Type**	**Incident Status**	**Incident Previous Status**	**Incident Disposition**	**Incident Queue**	**Incident Staff Thread**	**Incident Response Sent**	**Incident Assigned**	**Incident Group**
4	**State: 00-Auto Response**														
5	00-AG Response Receipt			X		X									
6	00-LTA Response Receipt			X		X									
7	00-WinBack Response Receipt					X									
8	00-SnapTax Response Receipt		X	X											
9	00-TT Support Response Receipt	X	X		X										
10	00-TTB Support Response Receipt	X	X		X										
11	00-TTET Support Response Receipt	X	X		X										
12	00-TTRB Response Receipt			X											
13	00-ITSD Support Response Receipt	X	X		X										
14	00-Others Transition to Smart Assistant														
15	**State: 01-Smart Assistant**														
16	01-No Smart Assist-Refund Form		X		X										
17	01-No Smart Assist-Order Status Inquiry		X		X										
18	01-No Smart Assist-Order Replacement CD		X		X										
19	01-No Smart Assist-Defective CD order		X		X										
20	01-No Smart Assist-Address Change		X		X										
21	01-No Smart Assist-Update Card		X		X										
22	01-No Smart Assist-TTRB		X	X											
23	01-No Smart Assist-SnapTax form			X	X										
24	01-No Smart Assist-Other Service				X										
25	01-Smart Assistant – General Text	X	X												
26	*01-TTB Smart Assistant - filtered (disabled)*	X	X												
27	*01-TTET Smart Assistant - filtered (disabled)*	X	X												
28	*01-ITSD Smart Assistant - filtered (disabled)*	X	X												
29	01-Others Transition to Queue Sorting														
30	**State: 02-Queue Sorting**														
31	02-ItsDeductible Queue		X	X	X										
32	02-SnapTax Queue			X											
33	02-TTRB Queue			X											

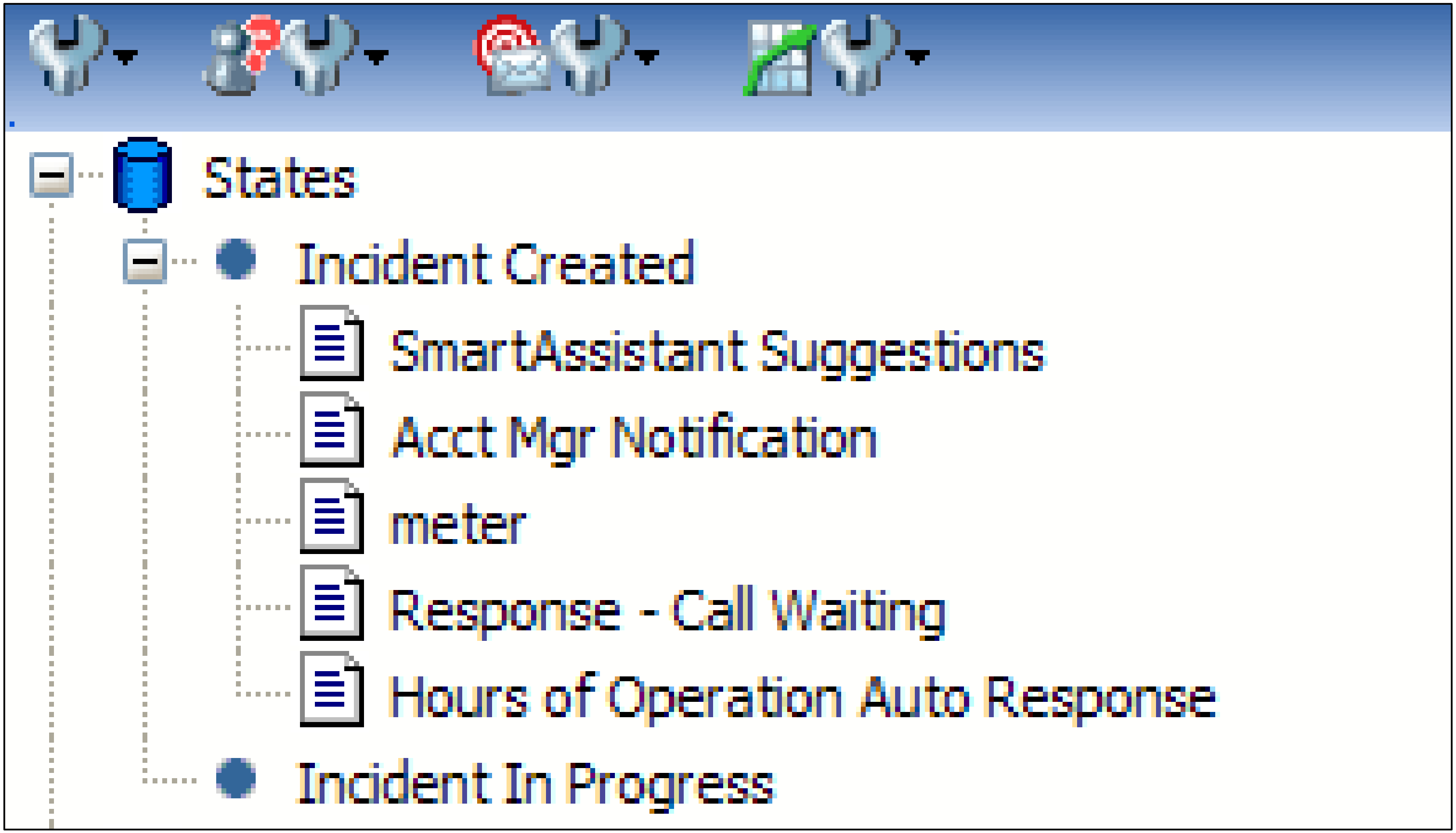
Close Up!

	A	B	C	D	E
1	**Disabled Rules**				
2	**Duplicate Rules**				
3	**Rules**	**Incident Interface**	**Incident Type**	**Incident Product**	**Incident Category**
4	**State: 00-Auto Response**				
5	00-AG Response Receipt			X	
6	00-LTA Response Receipt			X	
7	00-WinBack Response Receipt				
8	00-SnapTax Response Receipt		X	X	
9	00-TT Support Response Receipt	X	X		X
10	00-TTB Support Response Receipt	X	X		X
11	00-TTET Support Response Receipt	X	X		X
12	00-TTRB Response Receipt			X	
13	00-ITSD Support Response Receipt	X	X		X
14	00-Others Transition to Smart Assistant				
15	**State: 01-Smart Assistant**				
16	01-No Smart Assist-Refund Form		X		X
17	01-No Smart Assist-Order Status Inquiry		X		X
18	01-No Smart Assist-Order Replacement CD		X		X
19	01-No Smart Assist-Defective CD order		X		X
20	01-No Smart Assist-Address Change		X		X

The Anatomy of the Rules Engine

- What makes the engine run?
- States
  - Contain rules
  - Can have more than one, in fact – you must
- Rules
  - If/then statements that dictate what happens to the object
- Transitions
  - Tell the object which state to move to
- All three of these things combined together and configured correctly allow for a smooth running engine!

States and Rules



Rule Language

- The If/Then….
- If something meets "x criteria, then I want "x" to happen
- You can apply multiple criteria and multiple actions
- The order of the criteria doesn't matter, but you may want to think about the order of the actions
- And always transition….or you'll be stuck in a loop
- Remember Newton's Law (specifically, the 3rd one)

AN OBJECT IN MOTION STAYS IN MOTION……

(UNLESS YOU STOP IT!)

Edit Incident Rule

Editing Rule in State: 001 Incident Created

Rule Name

001 Route Mobile Phone Incidents Tier 1

Notes

This Rule routes incidents to the Tier 1 Queue where mobile phone is the product selected by the customer

If

1 Incident.Product equals

- [ ] Voice Services
- [x] Mobile Phones
- [ ] Modem Services
- [ ] Data Services
- [ ] RightNow CRM v7.0
- [ ] Sales Literature

Delete Condition

Add condition based on:

Then

1 Assign Queue
Tier One
Delete Action

2 Transition State and stop
002 Incident In Progress
Delete Action

Save Cancel

Organization is KEY!

- States
  - Incident Created
    - SmartAssistant Suggestions
    - Acct Mgr Notification
    - meter
    - Response - Call Waiting
    - Hours of Operation Auto Response
  - Incident In Progress

vs.

- States
  - 001 Incident Created
    - 001 SmartAssistant Suggestions
    - 001 Route Mobile Phone Incidents Tier 1
    - 001 Route Voice Services to Tier 2
    - 001 Acct Mgr Notification
    - 001 Meter
    - 001 Response - Call Waiting
    - 001 Hours of Operation Auto Response
    - 001 Catch All
  - 002 Incident In Progress
    - 002 Reassign if phone follow up
    - 002 Reassign to Tier 2 if Urgent
    - 002 Solved
  - 003 Solved

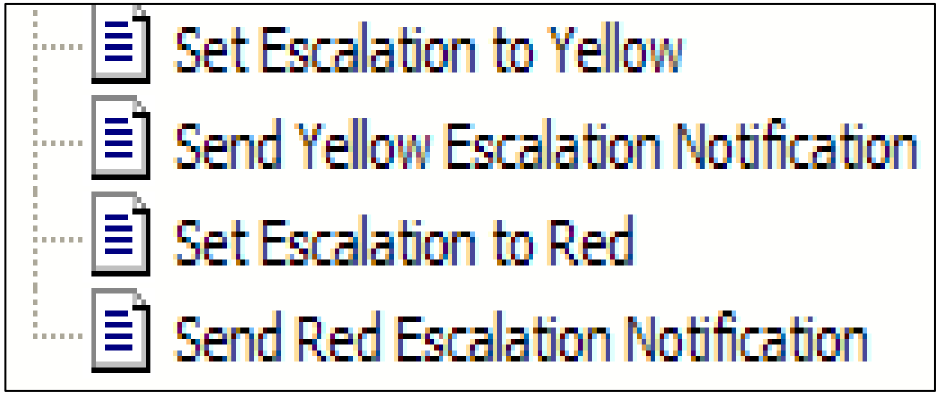
A Few Tips.....

- Plan your naming conventions
  - States
  - Functions
  - Rule Names
- Name your rules so you can identify them
- Use the notes fields to describe what the rule does
- Make sure that you have a catch all rule
- Make sure you transition – tell the object where you want it to go after it qualifies for the criteria

Escalations

- How do they work?
- Escalation rules update fields with a named escalation value when a time criteria is met
- If an action is to occur as a result of an escalation, it takes two rules!
  - One rule sets the alarm clock
  - The second rule tells the clock to go off when the criteria is met
- For example:
  - If the incident is unresolved after 6 hours, set the escalation level to LOW
  - Six hours later, if the incident is still unresolved update the escalation level to LOW and notify a manager

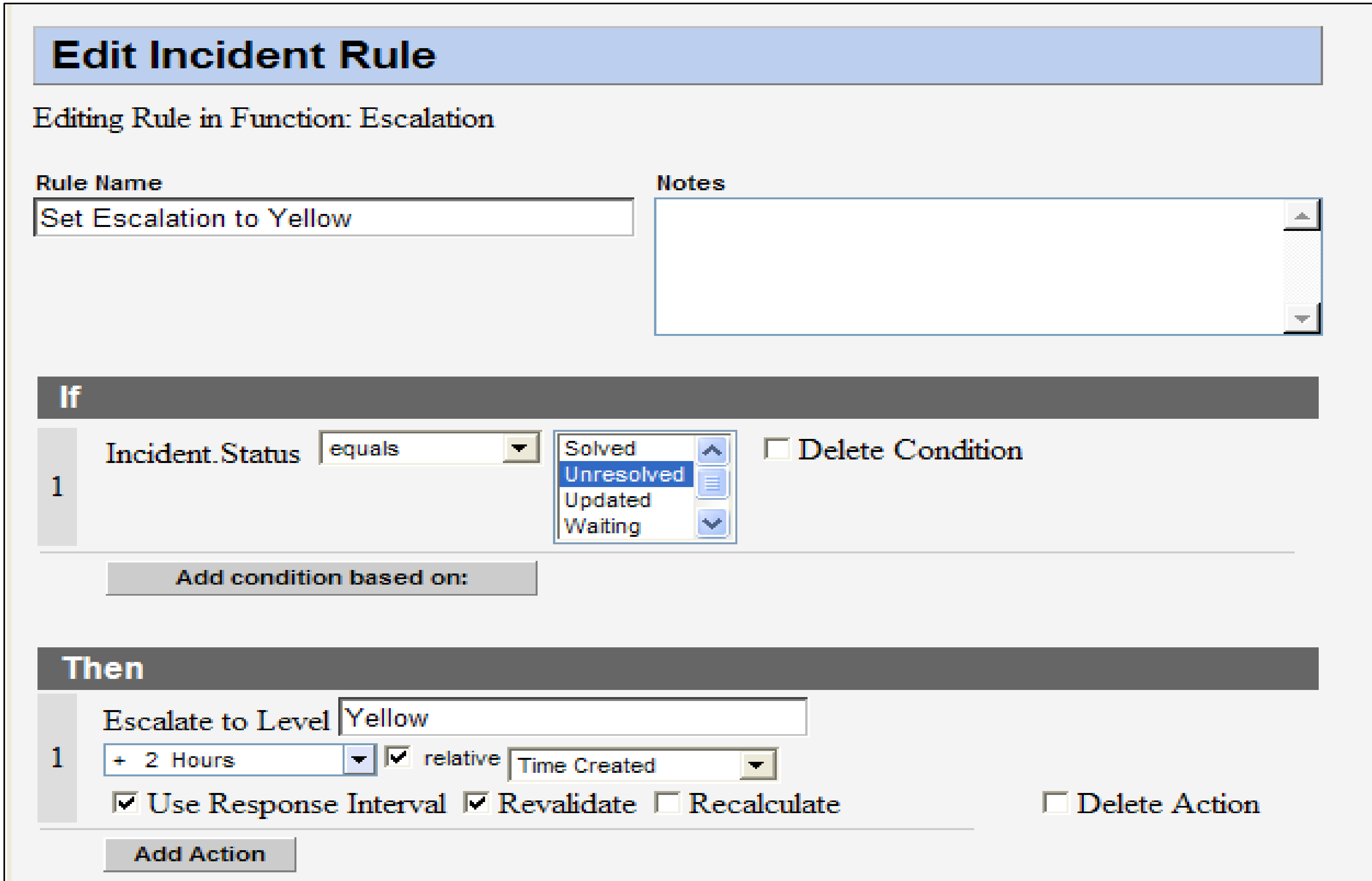
Escalation example



- After 2 hours, if an incident is unresolved, set the escalation level to ‘Yellow’ and notify a manager
- After 6 hours, if an incident is unresolved, set the escalation level to ‘Red’ and notify a manager

- QUESTION: Other than notifications, how else might you be able to quickly see where escalation fields have been set to help provide better service to your customers?

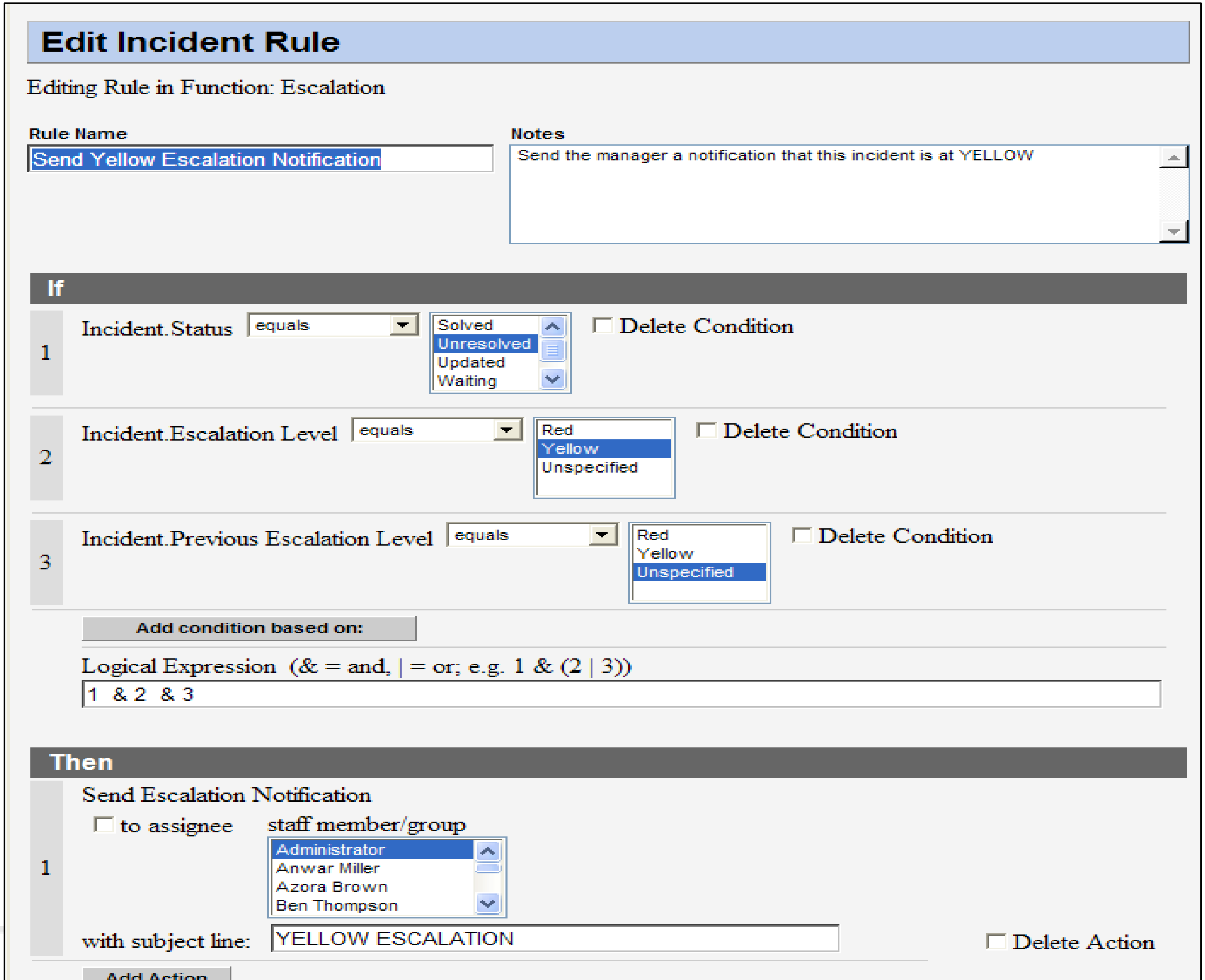
Set Escalation Definition



What do those check boxes mean?

- USE RESPONSE INTERVAL
  - Binds to business hours or SLAs
  - Question – where are business hours set?
- REVALIDATE
  - Rechecks against the conditions/criteria set in the rule definition when the time criteria is met
  - Question – why check this box?
- RECALCULATE
  - Reschedules the escalation time for the updated incident, answer or opportunity when it is updated
- Consider how these check boxes ultimately affect your customer’s experience with your service

Alarm Clock Goes Off!



Edit Incident Rule

Editing Rule in Function: Escalation

Rule Name

Send Yellow Escalation Notification

Notes

Send the manager a notification that this incident is at YELLOW

If

1 Incident.Status equals
Solved
Unresolved
Updated
Waiting
Delete Condition

2 Incident.Escalation Level equals
Red
Yellow
Unspecified
Delete Condition

3 Incident.Previous Escalation Level equals
Red
Yellow
Unspecified
Delete Condition

Add condition based on:

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

1 & 2 & 3

Then

1 Send Escalation Notification

to assignee staff member/group
Administrator
Anwar Miller
Azora Brown
Ben Thompson

with subject line: YELLOW ESCALATION

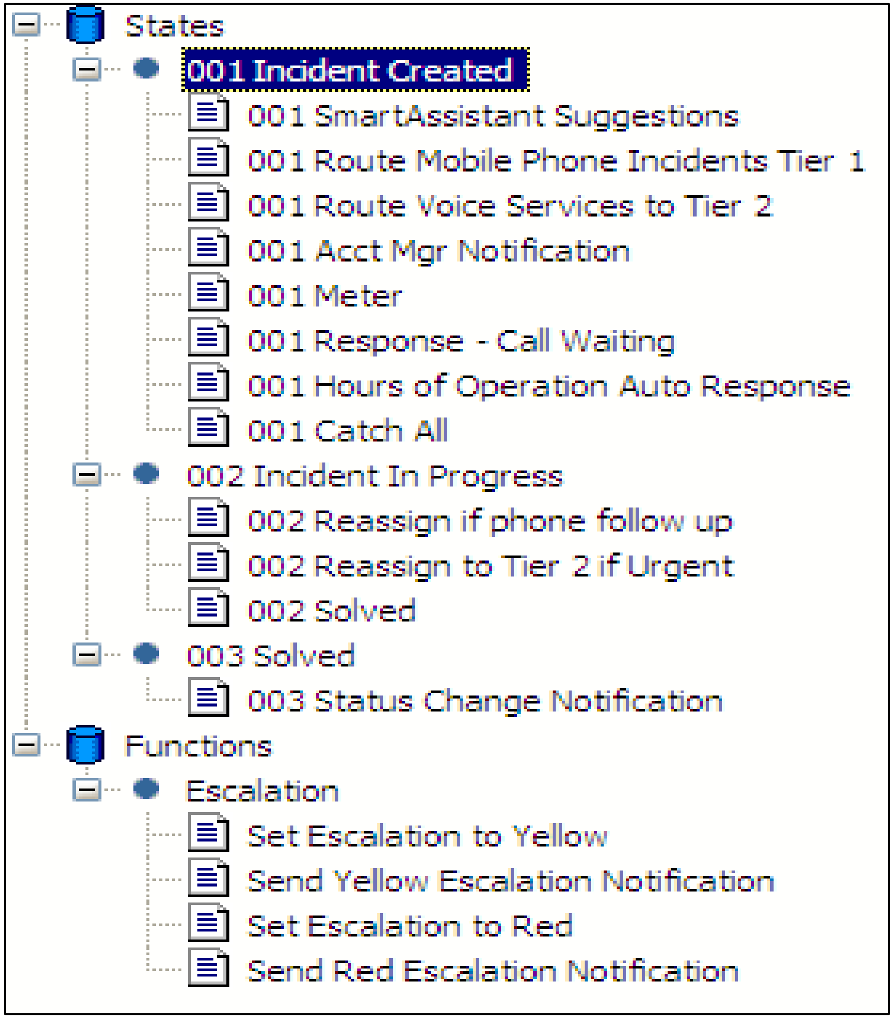
Delete Action

Add Action

Escalation Facts, Tips and Tricks

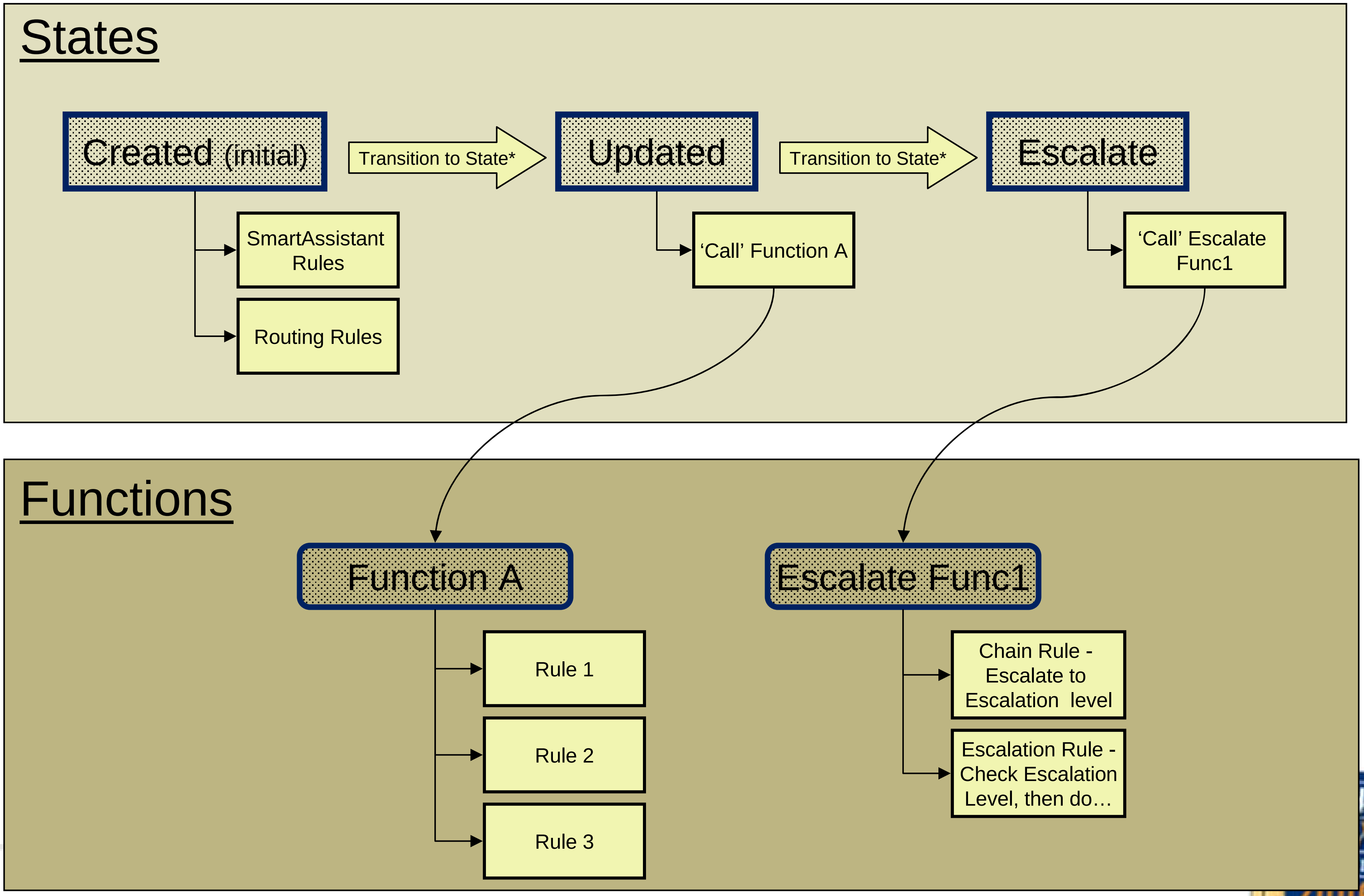
- Escalation rules do not affect the incident queue statistics on the Session Console
  - What needs to be set to change the colors on the stats on the Session Console?
- Escalation rules themselves do not turn objects colors
  - Color expressions in views must be set up to highlight escalated objects
- There is a utility that runs, dbstatus, that controls the escalation process behind the scene
- Views and reports can be used to quickly see what escalation levels have been set for which objects
- Think about the most effective way to escalate
  - Notifications? Views? Reports?
  - What will prompt the most efficient course of action and help you provide great customer service?

Functions



- Functions are a set of rules that are only executed when they are called by another rule
- Create functions when you have a set of rules you want to execute more than once
- In this example, an escalation function has been created. This function is called from rules within each state, as the same escalation rules apply to all incoming incidents
- Other examples?

Business Rules Overview



Rule Management

- Changing rules in edit mode
  - View mode vs. Edit mode
  - Active rules are running; rules in edit mode are not active until the activate button is hit
- Activating rules
  - What does it mean to activate
  - What does “abandon” really mean?
- Troubleshooting
- Understanding the rule log
  - Located under Common>Rules>Rule Log
  - Need to have appropriate profile permissions to access
  - Tracks rule execution

Examples of Rules for Great Customer Service

- SmartAssistant rules
- Rules that provide an answer based on the criteria the customer has put in their question
  - Could be based on product, category or a thread
  - Can direct customers to an immediate answer
- Create Standard Text responses that set customer expectations appropriately
- SPAM filtering rules
- Sending pager alerts for emergency situations
- Automatic rerouting based on how an agent updates an incident

Best Practices

- Map out the workflow
- Decide on naming conventions for states and rules
- Use the notes fields to describe the function of the rule
- Limit the number of people who have access to edit 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
- Make sure the rules route the object – transition!

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!