

# The Contact Center as a Competitive Advantage

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# What makes us competitive?

- Passionate organization
- Happy customers
- Lower costs
- Revenue generation
- Making the best use of our solutions



# Passionate Organization

- Approach – Take a hard look at your support experience through your customer's eyes
- Culture – Who are you hiring and what is the message you give them going into the battle?
- Empowerment – Do people feel comfortable challenging the status quo?
- Staying in the Domain – Are you part of the community of professionals in the support world?
- Care and Feeding – Do your people know what they need to do, how they are doing and what their next career steps are?



# Passionate Organization

- Approach
  - Outside In
  - Customer Focused
- Culture
  - Hiring / Three I's
  - "You are the solution" / Customer isn't the problem
- Empowerment
  - Freedom to speak up when things aren't working
  - Encouraged to blow things up – "I reject that..."
- Staying in the Domain
  - Read – CRM Magazine, Call Center Magazine, books...
  - Involve yourself in the industry – SSPA, CCSF, ASP, etc.
- Care and Feeding
  - Performance Review Plan
  - Career Planning



# What Makes Customers Happy

- We know who they are
- They can get to us how and when they want to
  - Multi-channel – Web, Voice, Email, Chat, and/or Phone
  - Knowledge at the Point of Action
- We provide clear, consistent answers that solve their issue in a timeframe that fits their needs
- We treat them with respect – people who “listen”
- Feedback and follow-up
  - Your team and your customers know what’s working and not
  - Leverage feedback to improve satisfaction and lower costs
  - Key is the ability/will to DO SOMETHING with it immediately



# Feedback and Follow-up

- Internal and External - Everyone's your customer
- Answer Feedback – Drive knowledge improvements
- RightNow Feedback™ (formerly Metrics)
  - Customer Satisfaction
  - Closed Incident
  - Product Feedback
  - Customer Advocacy (Net Promoter®)
  - Employee Feedback
- Closed Incident – Archimedes Lever



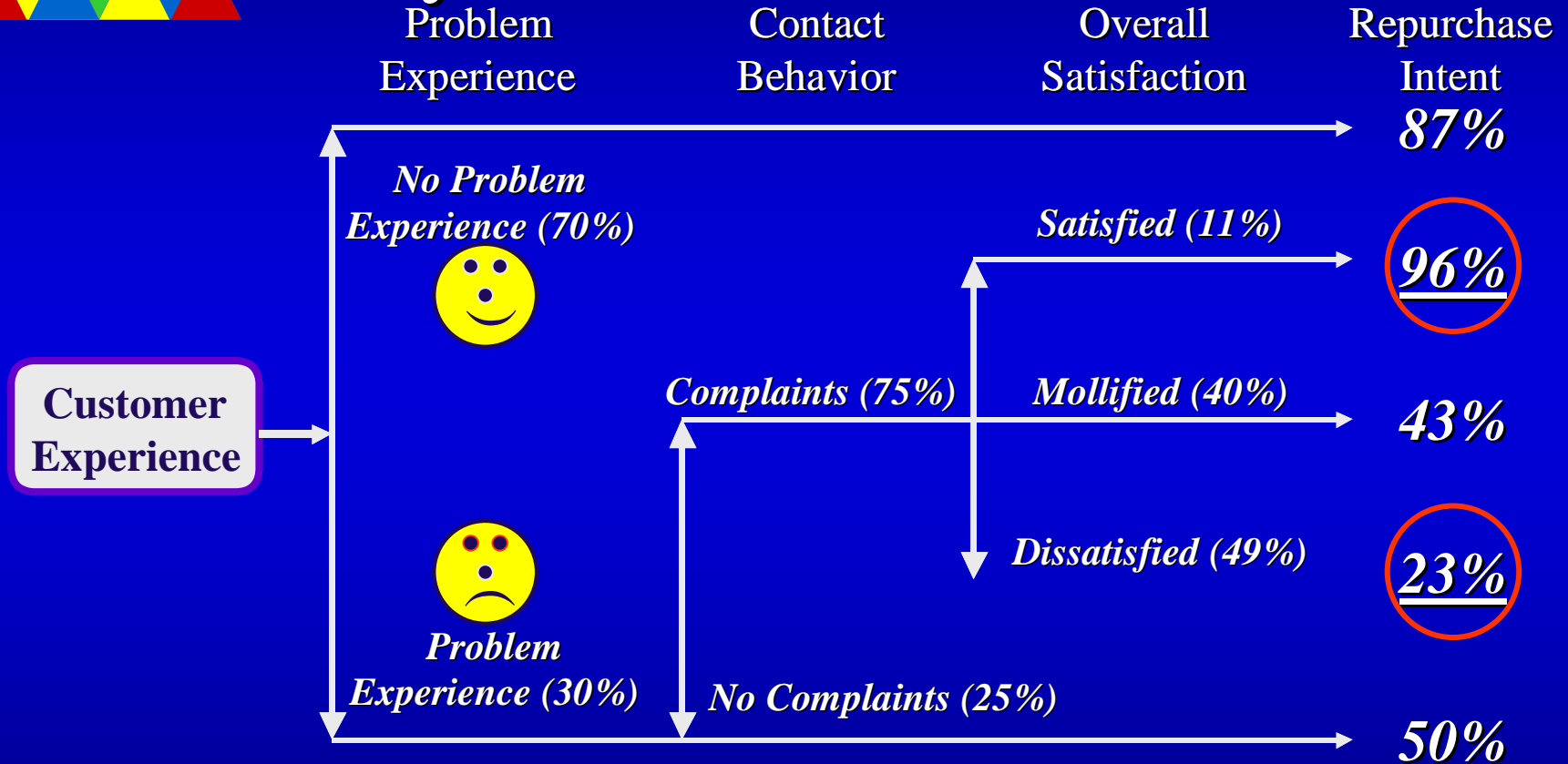
# Closed Incident Surveys

- Likely the easiest improvement lever you have to move
- 3-5 questions with numerical scale
- Text box for free-form feedback
- Use rules to raise alerts for dissatisfaction
- Call customers back – speed of follow-up is important
- Make systemic fixes and report back to customers
- Results stored in customer record – RightNow 8™





# Recovery Behavior



Source: TARP's White House Study

# What Lowers costs?

- Efficient Interactions
  - Multi-channel, gravitates to lowest costs
  - Applicable, consistent answers across channels and geographies
  - Proactive service
    - SmartAssistant®
    - Outbound Email
    - Feedback
- Managing Performance
  - KAPA – Self-learning knowledge base
  - Knowledge base and agent efficiency



# Efficient Knowledge Base Interactions

- Every knowledge interaction ends at one of eight points
- The path users follow to get to one of these outcomes teaches you something about your operation and/or your customers
- Understanding the path to each of the outcomes allows you to take action
  - Take advantage of session data to tune your knowledge base
  - Every investment here saves \$\$\$ in agent costs

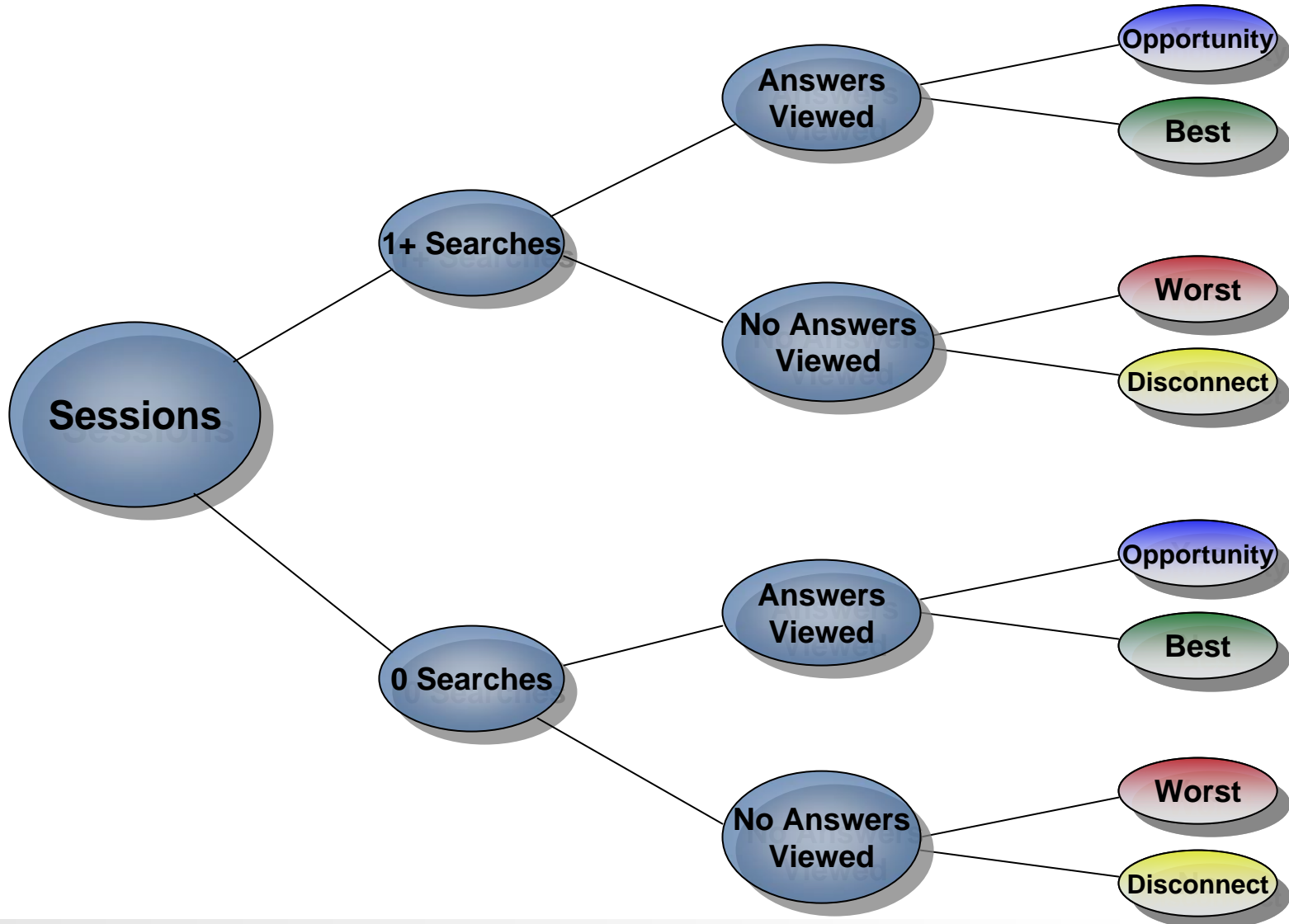


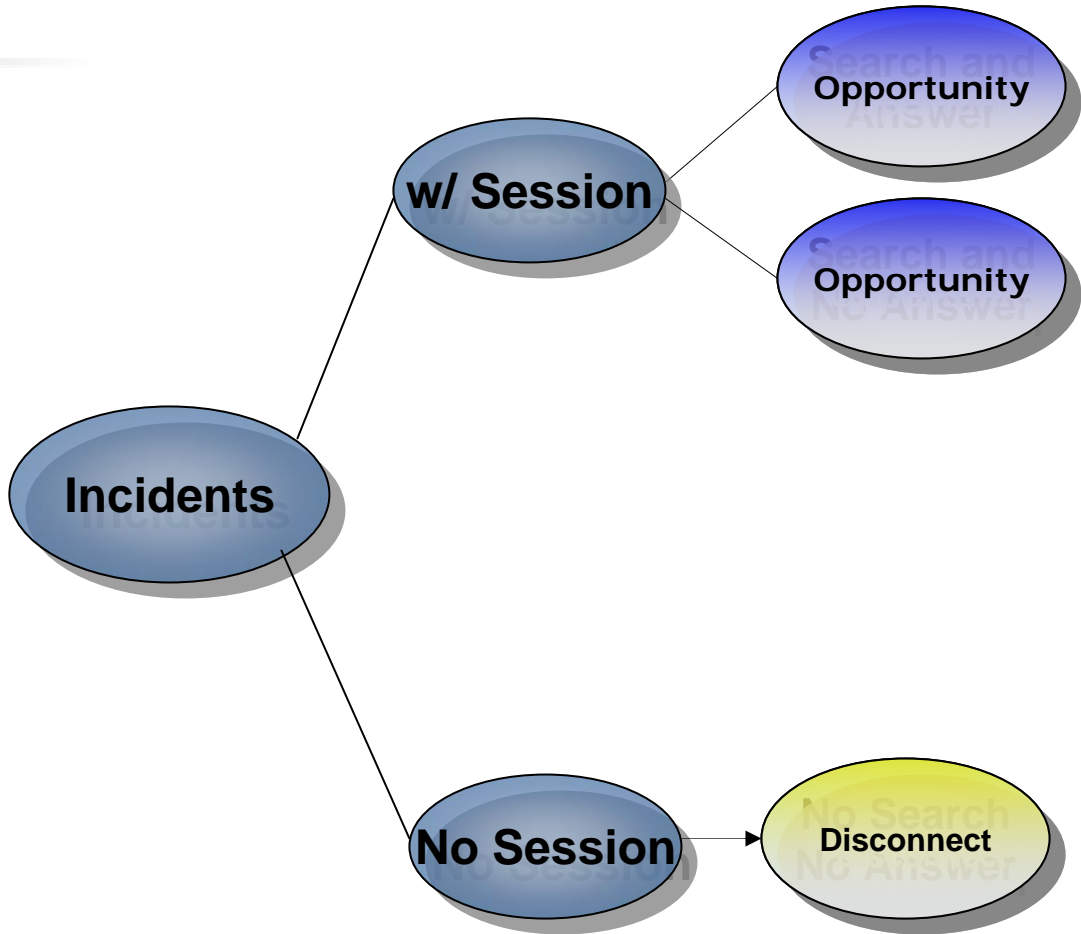
**Session**

**Searches?**

**Answers?**

**Incidents?**





- Look at Session Data
- Create new answer?
- Tune existing answer?

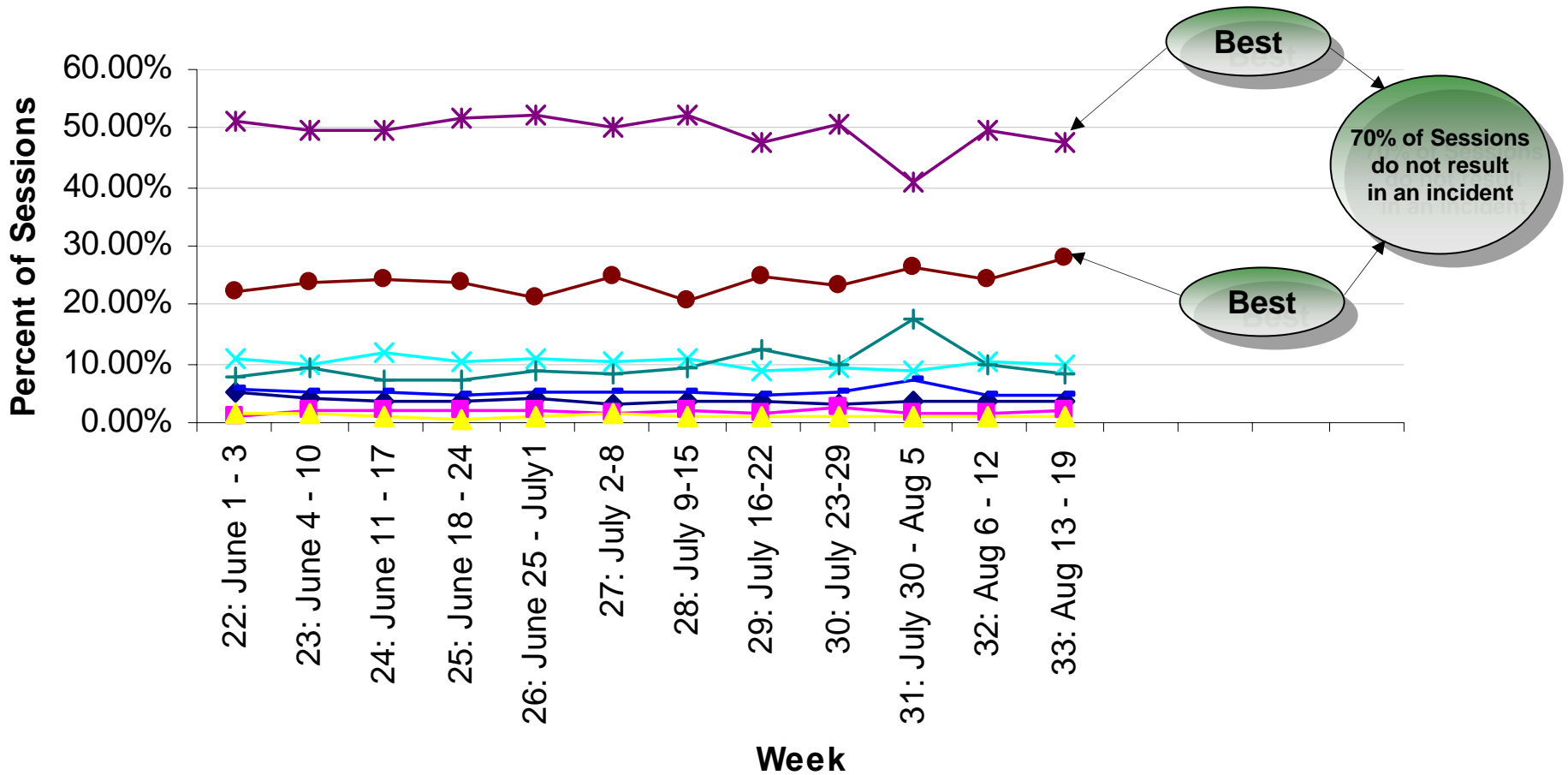
- Look at Session Data
- Question phrased correctly?
- Would answer push help?

Are you?

- Sending SmartAssistant suggested solutions with email responses?
- Using Message on Hold to advise customers about self-service options?
- Using voice self-service?



### Session Breakout by week



- ◆ 1. Incidents with Search with Ans View ed
- ▲ 2. Incidents No Search with Ans View ed
- ▲ 3. Incidents with Search, No Ans View ed
- ✕ 4. Incidents Only - No Search, No Ans View ed
- ✱ 5. No Incident with Search with Ans View ed
- 6. No Incident, No Search, with Ans View ed
- + 7. No Incident with Search, No Ans View ed
- 8. No Incident, No Search, No Ans View ed

# Keyword Search Report

The screenshot shows the 'Analytics Console (RightNow Customer Service)' interface. The left-hand navigation pane is expanded to show the 'Keyword Search' report under the 'Incident Reports' category. The main content area displays the report details, including a title 'Keyword Searches' and a subtitle 'Phrase Stem'. Below this is a table with three columns: 'Phrase Stem', 'Search Count', and 'Answers'. The table lists various search terms and their corresponding counts and answer counts.

Phrase Stem	Search Count	Answers
1351	8	0
CASTL	12	0
A_SUGGEST_LIMIT_CAT_LVL	5	0
SCREENPOP	6	0
PDA	6	0
GEXPAND	10	0
FORREST	6	0
1575	10	1
SAWMIL	8	1
1124	6	1
1183	6	1
ERD	6	1
FIREFOX	6	1
GROUP_DAT	6	1
2364	8	1
WAP	6	1
STREAM	12	1
2308	12	1
2209	12	1
1838	8	1
SMARTGUID	7	1
SPF	13	1
RNTINFO	13	1
68	13	1
ARCHITECTUR	7	1
2302	7	1
1925	9	1
CNAME	9	1
POPCHART	6	1
1491	5	1
1560	5	1
ENVIRONMENT	15	1
1837	5	1
2015	5	1
2141	5	1
2411	5	1
2489	5	1
CORDA	5	1



# Efficient Agent Interactions

- How often are issues being escalated outside frontline?
  - Thread count report
- Are agents equipped with the knowledge to solve the majority of issues the first time?
  - Use one-on-ones, surveys or MBWA to find out
- Are you studying how and why handoffs take place and taking action to prevent them?
  - Identify three issues per week to fix
  - Provide frontline agents with training and tools
- What's your first (second) contact resolution rate?
  - First contact is usually your website...



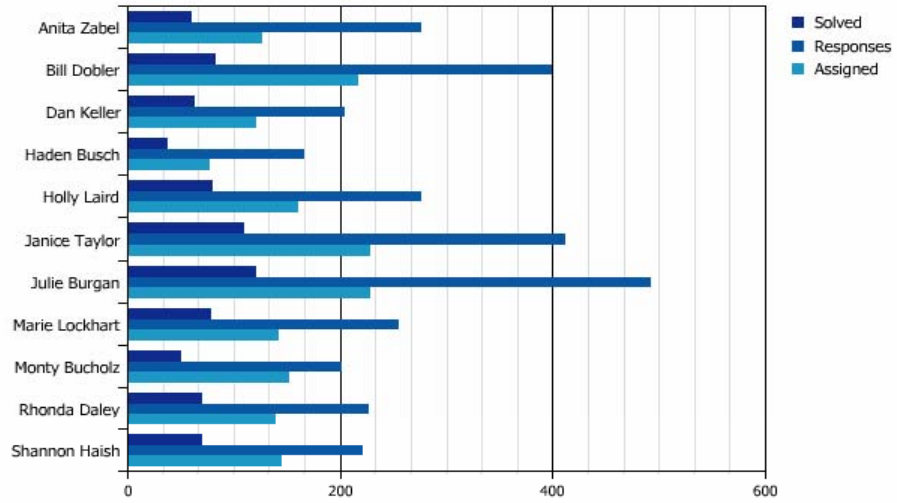


Parameters Description Report

# Agent Effectiveness

## Agent

Agent Effectiveness



Agent	Assigned	Responses	Solved	RPA	FCRR
Anita Zabel	127	276	61	2.2	26.0%
Bill Dobler	218	399	83	1.8	17.0%
Dan Keller	122	204	63	1.7	31.1%
Haden Busch	78	167	38	2.1	17.9%
Holly Laird	161	277	81	1.7	29.2%
Janice Taylor	228	412	110	1.8	33.3%
Julie Borgan	228	492	122	2.2	17.5%
Marie Lockhart	142	256	79	1.8	27.5%
Monty Bucholz	153	202	51	1.3	27.5%
Rhonda Daley	140	227	70	1.6	35.0%
Shannon Haish	146	222	70	1.5	32.2%
<b>Total</b>	<b>1743</b>	<b>3134</b>	<b>828</b>		

Record Count: 11

# Agent Empowerment

**Incident (RightNow Customer Service)**

**Reference #**  
060809-000009

**Primary Contact**  
Daniel Murray  
dmurray@rightnowtech.co  
RightNow Support Site

**Status**  
Solved

**Assigned**  
Team Lead  
Curtis Johnson

**Product**  
RightNow Service

**Category**  
Installations and Upgrades

**Disposition**  
Administration  
Hosting Issue

**SLA**  
Preferred - Sev 2-4(17767)

**Queue**  
Tier 1

**Messages** | Details | Time | Organization | Contact | **CSI** | **HMS** | **ErrorLog** | **Sales Leads**

**Subject** HMS UPDATE - Test Site Created [7.5.5.0] [RIGHTNOW]

**Response (XML\_Created Placeholder)** 08/09/2006 01:56 AM

Your Test Site has been created for RIGHTNOW, please update this incident with any questions or issues you may have. Here is a list of php files that will not be carried forward. You can find copies of these files in your backup directory. Here is a list of PHP files that will not be carried forward. You can find copies of these files in your backup directory.

rightnow

**Add**

- Customer Entry
- Response
- Note

'Offers...  
Standard Text...  
Suggestions...  
Search...  
Quick Text...  
Quick Answer...

Save Cancel Send Response  Options... Spelling Forward Print

Done User: Rob Irizarry 3:10 AM

# How do we generate revenue?

- Marketing automation
- Offer Advisor
- Topic words to pop up a recommended answer
- Chat on product selection and checkout pages



# Generate Revenue

- Partner internally to find opportunities and/or do it yourself
- Proactive Communication
  - Leverage your contact history to announce and sell new products, add-ons, and upgrades
  - Event driven campaigns are good for this – Ex. Pre-Order
- Offer Advisor
  - RightNow solution feature
- Leads Tab
  - Custom tab we built
  - Native function in RightNow 8



# Offer Advisor

Support Console (raddtest8)

Support Console

Quick Search ▾ All Incidents Refresh Search Fill

New ▾ Edit ▾ Delete ▾ Print ▾ Forward Propose

Viewing All Incidents Records Found: 126

Offer Advisor - Radd Icenoggle

Promotions Found: 3

	Name	Summary	Rank /	% Yes	Match	History
1	3000 off peak minutes	Get 3000 off peak minutes when you purchase a ConexFlip Phone	1	100		Yes
2	50% extra minutes Free every 50% extra minutes Free every month		2	0		
3	\$20 Fixed monthly bill with Mix \$20 Fixed monthly bill with Mix It		3	0		

Suggestions Found:

Name	Summary	Rank /	% Yes	Match	History
Yes to Promotion '3000 off peak minutes'	See Incident 051025-000007				

**Create New Opportunity**

Name: Yes to Promotion '3000 off peak minutes'

Summary: See Incident 051025-000007

**Guide: 3000 off peak**

When you purchase the

- \* 3000 off-peak minutes
- \* Increased Battery Pow
- \* Free Voicemail

For only \$25 per month

**Product Details: ConexFlip 5280**

ID: 5280  
 Name: ConexFlip 5280  
 Description: Small and lightweight, the ConexFlip 5280 phone combines modern styling with enhanced mobile communications. Global roaming capabilities and a built-in microbrowser let you access news, weather, stocks, and more on the go. Personalize your phone with downloadable ring tones and unique screen saver designs!

Yes Interest No Search Close

Quick Text... Quick Answer...

Save Cancel Send Response  Options... Spelling Forward Print

Done User: Administrator 9:49 AM



# Sales Leads Tab

Support Console (RightNow Customer Service)

Support Console

Quick Search ▾ Default Refresh Search

Viewing Default

Records Found: 0 (initial search disabled)

Ref_no	Email	Subject	Updated	Assigned	Status Type	Last Respo	Severity
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Organization Contact CSI HMS ErrorLog **Sales Leads**

**Submit Sales Leads**

Org Name: Linksys - Subsidiary of Cisco Systems  
Account Manager: Shellee Meagher [smeagher@rightnow.com]  
Manager: Marcus Bragg [marcus@rightnow.com]  
Reference Number:

Assigned Rep: \* Shellee Meagher

Customer Contact: Brian Stoner

Value Guide:

- Fast-Track
- Fast-Track to CRM Upgrade Program
- Pilot Services
- Pilot Services
- CORE Implementation Services
- Hosted Mailbox
- RightNow Sales
- RightNow Marketing
- Site Indexing
- Remote Implementation Support

Why does the customer need the service?

Who did you speak with?

What did you tell them regarding the service?

Did the customer confirm interest?

Submit Query

Save Cancel Send Response Options... Spelling Forward Print

Done User: Rob Irizarry 6:35 AM



# Making the Best Use of Our Solutions

- RightNow will help!
- Tune-Ups
- Customer Success Index
- Best Practices
- Professional Services
  - Education Services
  - Optimization Audits
  - Outsourced Administration
  - Consulting
  - Customizations
  - Integrations



# Tune-Ups

- Your business is changing, as is our solution
- Covers any/all modules - Sales / Marketing / Service
- Ensure you are maximizing your efficiency and ROI via best practice suggestions from our thousands of deployments
- Schedule via the My Stuff Page on our support site



# Customer Success Index

- Measures Five Key Performance Indicators
- 0-100 Point Score
- Ensures you are getting the best value from our solution



# Success Score

Health Key			
Area	Value	Points Earned	Point Groups
Last Tuneup Date	Within 6 Months (or live date within 90 days)	15	30
	Between 6-12 Months	10	
	More than 12 Months	0	
Last Tuneup Score	80 or above	15	
	60 to 79	10	
	Less than 60	0	
Version	7.5.2 or Above	20	20
	7.0.x - 7.5.1.x	10	
	Below 7.0.x	0	
Integration	XML/External Events/Custom Tabs	10	20
	None	0	
Event Participation (User Conference or Roundtable)	One event in the last year	10	
	None or Older than 1 year	0	
Traffic	10,001 Hits or Greater	15	15
	Between 5,001 and 10,000 Hits	10	
	Between 1,001 and 5,000 Hits	5	
	Less than 1,000 Hits	0	
Features Used	Ask a Question or Email Gateway Enabled AND	15	15
	Answers Enabled AND		
	At least two workflow/business rules		
	Missing one of the criteria above:	0	
<b>Total:</b>			100

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- Making the best use of our solutions



Q & A