

Knowledge at the Point of Action: A Breakthrough for Your Business

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Agenda: Knowledge at the Point of Action

- The business challenge
- What is “knowledge at the point of action”
- Tangible examples
- What does KAPA mean to your organization
- Considerations and requirements for success
- The knowledge at the point of action payoff

Note: KAPA is the acronym for “knowledge at the point of action”.



The Customer Experience Dilemma

- Business success is created one great customer experience at a time.
- Customer experience initiatives can be expensive, and companies are constantly driven to reduce costs.
- The Dilemma – either spend money you don't have to improve the customer experience OR cut costs and risk losing customers.



Resolving the dilemma

- Requires a breakthrough solution: knowledge at the point of action.
- Knowledge, not data, at the frontlines of your business in real time.

	<i>With KAPA</i>	<i>Without KAPA</i>
Knowledge dissemination	Leveraged across 100% of frontline staff	Limited to small % of frontline staff
Point of usage	Inline: live customer interaction	Offline: post-interaction
Customer engagement	Proactive, anticipatory	Reactive, latent
Experience result	Superior, consistent	Poor, inconsistent
Experience/cost ratio	High (high experience, low cost)	Low



A Few Easy Examples...

- Customer Service Frontline:
 - When your customer calls to check on the status of an order, through automated speech prompts they are able to immediately obtain up-to-the-minute status of the shipment without having to wait to talk to an agent.
- Marketing Frontline:
 - After a prospective customer has registered on your site, you are able to tune and deliver future communications to them that are highly relevant and personalized and avoid sending them irrelevant or unwanted information.
- Sales Frontline:
 - Your sales rep is calling to schedule a visit to a client or partner to present a new product. The rep is aware of any marketing communications or special offers that have already been presented to the client. Prior to the meeting, receives a notification on his PDA of a new trouble ticket. He can proactively work with service to help resolve the client's issue, increasing his opportunity to be successful.



Kodak EasyShare Gallery

Kodak EasyShare Gallery



- Voice self-service significantly reduces staff workloads
- Transparent routing of calls to outsourcing partner eliminates need to hire and train temporary workers
- Common voice and web knowledge base ensures consistency of answers and lowers administrative complexity
- Automated systems provides service 24 hours a day



American Express Incentive Services (AEIS)

INCENTIVE SERVICES



Industry: Financial Services

Business Situation:

- Needed to deliver better clients experience through sales process—from prospect to long-term customer
- Installed client-server sales/CRM solution not integrated

Knowledge at the Point of Action:

- Customized sales process guides sales with best practice steps.

Results:

- Better client experience
- Higher sales productivity - team of sales leaders!
- Streamlined, real-time lead management



NCsoft

Industry: Software – Online Games



Business Situation:

- Top competitive differentiation is delivering outstanding online experience to drive customer satisfaction and loyalty

Knowledge at the Point of Action:

- Integrated RightNow into the games themselves so gamers can submit questions directly within their active gaming sessions
- Real-time information captured about where the gamer is and what they're doing enables staff to more quickly and effectively answer questions

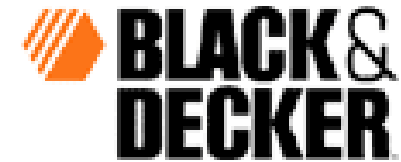
Results:

- Estimated \$1 million saved annually



Black & Decker

Industry: Manufacturing



Business Situation:

- Corporate initiative to make the entire organization more responsive to customers and leverage every customer interaction to drive greater market share.

Knowledge at the Point of Action:

- Use RightNow Service, Marketing, Voice and Feedback to leverage KAPA consistently across channels.
 - RightNow tracks all calls to gauge caller trends, adding new functions to continually enhance the customer experience.
 - Leveraging customer service interactions to deliver knowledge about customers' wants and needs to managers throughout the company.

Results:

- Improving ability of the company as a whole to respond to customers, even as they reduce costs.
- More informed decisions about what the customer needs and how they want to be approached = greater revenue, greater market share and greater profits



Industry: Broadband Communications

Business Situation:

- Needed customer experience superiority in highly competitive and commoditized ADSL market

Knowledge at the Point of Action:

- Self-service:
 - “Top 5 Answers” without searching
 - SmartAssistant attempts to understand and answer online question one more time before sending email into call center
- Email: complete audit trail helps agent quickly address customer needs

Results:

- 97% customer self-service rate. Emails reduced by 30%
- Improved visibility of customer queries drives continuous knowledge and website content improvements
- Sharing knowledge with outsourcers ensures consistency



British Telecomm



Industry: Telecommunications

Business Situation:

- Deliver superior employee experience while controlling costs

Knowledge at the Point of Action:

- AskHR:
 - 24x7 self-service access via a direct link off the BT People intranet
 - Integration with the PeopleSoft system allows employees to act on information they have viewed by clicking on 'create a case' buttons
 - Employee feedback for continuous improvement
 - Multil-ingular

Results:

- Better management of employee information drives higher accuracy
- Cost savings from deflecting routine inquiries to automated channels
- Embedded analytics provides actionable insight into what information employees actually seek



Fed Citizens Information Center



Industry: Government

Business Situation:

- Deliver superior constituent experience while reducing budget

Knowledge at the Point of Action:

- FirstGov.gov:
 - Official portal of the US government
 - KAPA provided victims and government agents with critical emergency and disaster relief and relocation information over the web, phone, and email
- Fed Info National Contact Center:
 - Answers more than 1.5 million calls and emails per year

Results:

- Improved knowledge management allows call center agents to quickly find up-to-date information on all facets of the federal government
- Cost savings from deflecting routine inquiries to automated channels
- Embedded analytics provides actionable insight into what information constituents actually seek

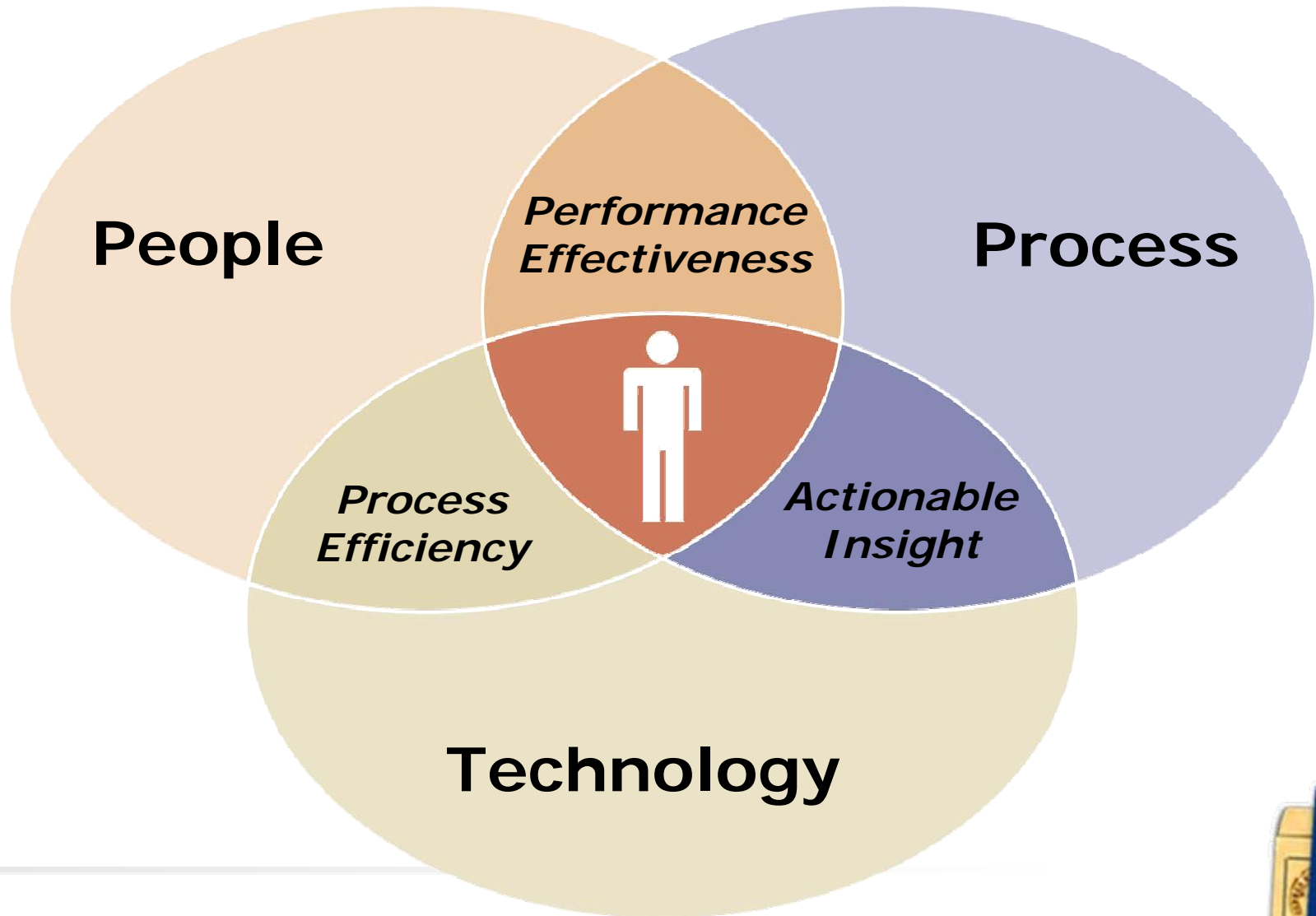


Discussion

- What does “knowledge at the point of action” mean to you?
- How are you doing it today?
- What more could you be doing?
- What are the hurdles?



Elements of Success



Success Factors: People

- People
 - ***Role alignment:*** Use personality and competency evaluations and tools to best match employees with jobs that fit their personalities and skills. Use these techniques in recruiting and to deploy existing staff.
 - ***Personal customer commitment:*** Provide each customer-facing employee with motivation to sustain a customer focus.
 - ***Knowledge management and continuous learning:*** Enable resources to leverage institutional knowledge quickly and systemically. Provide a basis for continuous learning throughout the employee population.
 - ***Parallel interest and rewards:*** Align personnel interests and motivations with job roles and use customer-focused metrics to measure success. Align performance metrics and employee compensation to customer-focused goals and objectives.



Success Factors: Process

- Culture of embracing change
 - “Outside-in” focus on customer experience
 - Executive and middle-management alignment
 - Frontline empowerment
 - Cross-departmental visibility, collaboration
 - Your holistic view and insight of the customer
 - Customer’s holistic view of your company
 - Performance measurement (KPIs)
 - Incentives & compensation policies
 - Training
- Right-channeling: offer right channel to right customer at right time (from their perspective, not yours)
- Proactive (anticipatory) customer engagement
- Constant customer feedback
 - Wherever and whenever they interact with you



Success Factors: Technology

- Capture Full Spectrum of Knowledge:
 - **Learns from every customer interaction**
 - **Real-time process knowledge** such as sales cycle status, the progress of a multi-stage campaign, or the age of an open incident
 - **Product and service knowledge** such as technical specifications, pricing, special promotions, appropriate use and warranties
 - **Company knowledge** such as store locations, return policies, news about mergers and acquisitions, customer references and third-party partnerships
 - **Competitive knowledge** about other companies' offerings and activities
 - **General knowledge** about technology or regulations that customers need to make better use of a product or employees need to do their jobs better
 - **Analytical insight** that managers need to continuously improve the customer experience—performance metrics (campaign response rates, first-call resolution rates, etc.), defect/complaint trends
- Maintain accuracy, relevance and freshness of knowledge over time
- Leverage a common knowledge foundation across departments and channels
- Facilitate real-time knowledge access for customers, frontline staff and partners



Success Factors: Technology

- Fully exploit self-service where practical and appropriate
- Multi-dimensional customer segmentation: life stage, product usage, behavior profile, and profitability.
- Customer experience designer – holistic processes and workflow to deliver unified experience across departments
- Embedded best practice processes
- Easy to use, role-based desktop
- Inline reporting for point-of-action insight
- Easily configurable to quickly adapt to changing business



The KAPA Payoff

- **Build emotional connection**
 - When you move along the spectrum away from a logical to an emotional connection, customers are more forgiving when you aren't perfect
- **Greater customer retention**
 - Satisfied customers are loyal customers. Loyal customers become advocates and drive business growth
- **Higher pricing and higher margins**
 - Customers are often willing to pay a higher price to companies that treat them better
- **Stronger brand identity**
 - KAPA delivers great customer experiences that become part of your brand
- **Word-of-mouth advertising**
 - By transforming your company into the kind of business that customers are happy to recommend, KAPA helps you cost-effectively increase revenue and market share
- **Reduced operational costs**
 - When you consistently give your customers the right information they need when they need it, how they need it, the first time, you drive down costs

