



An Oracle Best Practice Guide  
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# Best Practices for Implementing Contact Center Experiences

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## Introduction

This best practice guide provides instruction on implementing contact center experiences with Oracle RightNow CX Cloud Service. It contains best practices for using the design tools in Oracle RightNow Contact Center Experience. Cross-functional teams—including operations managers, analysts, and IT professionals—usually take on the experience design. The best practices in this guide can be applied by IT and operations practitioners as they approach strategic and incremental customer experience improvement initiatives.

## Understanding the Challenges of Contact Center Processes

Guiding agents to deliver satisfying customer experiences is a cornerstone objective of nearly every contact center. Traditional approaches range from agent training and skills development programs to call scripting. Newer approaches include the use of agent-facing knowledge and contextual guidance. But how do you implement these approaches successfully?

Customers using Oracle RightNow CX Cloud Service have a wide range of experience design tools in Oracle RightNow Dynamic Agent Desktop Cloud Service to guide their agents. Each of these tools optimizes the agent experience in a specific type of situation. Oracle RightNow Contact Center Experience gives you the power to combine these tools for your agents.

With so many options, the task of implementing your contact center processes can be challenging, especially in cases in which multiple tools can be used to provide agents with the guidance they need. This guide contains detailed information on how to implement contact center processes and experiences with Oracle RightNow Dynamic Agent Desktop Cloud Service.

## Addressing the Challenges Through Best Practices

This guide will take you through the four main steps of implementing Oracle RightNow Dynamic Agent Desktop Cloud Service:

- Implement your operating processes and procedures
- Prescribe workspaces to agents that support operating processes
- Integrate agent processes with communication channels
- Test, train, deploy, and refine

Through these stages, you will take the basic steps common to any desktop implementation project. As you design your desktop implementation, you can use these steps as a starting point to build a detailed technical design and corresponding project plan.

### Implement Your Operating Processes and Procedures

Why do your customers contact you? Do they need service or support? Are they trying to make a purchase? Perhaps they are concerned about recent news regarding your product or company? The first step in beginning to implement contact center experiences is to figure out which experiences your customers need.

In a traditional call center, you measure the volume of various call drivers and manage staffing, training, and investment in supporting systems accordingly. In a more modern contact center, you go further and map processes formally for the top 80 percent of interaction volume via interaction channels such as phone, e-mail, chat, and social networking.

## Align Incident Categories with Interaction Drivers by Volume

Oracle RightNow CX Cloud Service contains an incident management framework in which you track and manage resolution of the various reasons customers contact your organization. At the heart of this model is the incident category menu. Categories are intended to map to the processes agents carry out. In a well-aligned contact center, these map linearly to the range of interaction drivers.

The first step in implementing your operating processes and procedures is to configure the list of incident categories to match your interaction drivers.

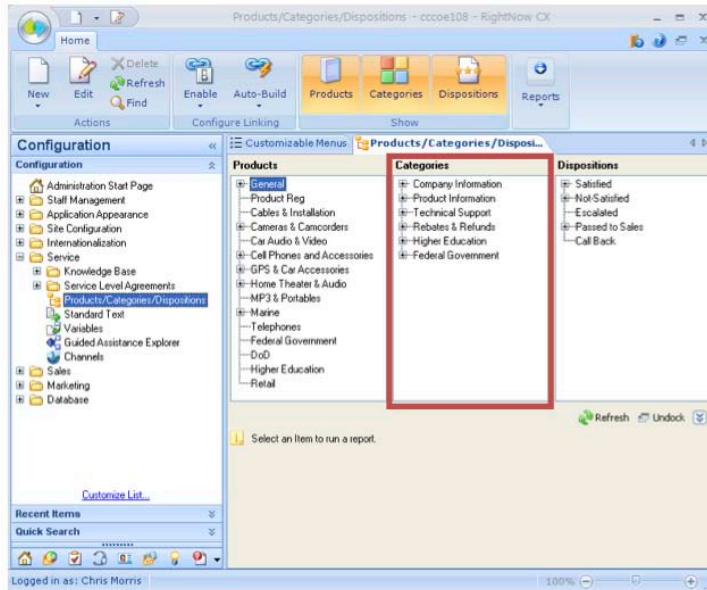


Figure 1. Configure your incident categories in the Oracle RightNow CX Cloud Service administration console.

How many categories should you have? Based on a poll of customers using RightNow CX Suite (now known as Oracle RightNow CX Cloud Service), you likely fit within a range of 20 to 100 categories.

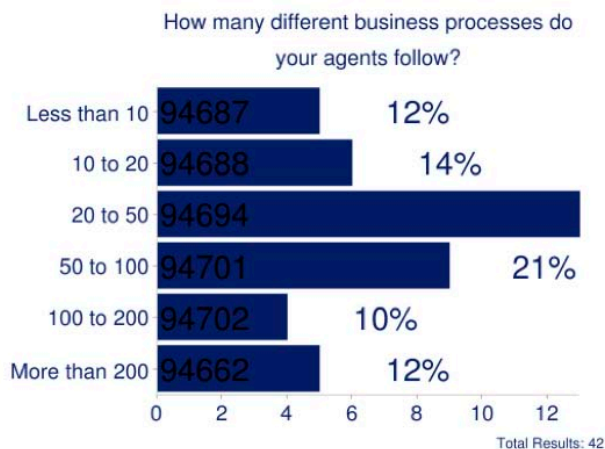


Figure 2. A poll of RightNow CX Suite customers at the North America Summit 2010 showed that most agents follow 20 to 100 categories.

Beyond this, you will typically need an “Other” category. As interaction volumes diminish below 80 percent, so does the value of mapping distinct categories. Instead of creating a category for every imaginable interaction driver, group the bottom 20 percent into the “Other” category.

### Use Incident Statuses to Represent the Stages of Case Resolution

Standard with the incident management framework in Oracle RightNow CX Cloud Service is a status menu for representing each of the stages along the path to resolution. At the highest level, every case has a few common statuses:

- Unresolved
- Updated
- Solved

From these general statuses that are provided by default with Oracle RightNow CX Cloud Service, you can specialize the incident statuses for each process to be carried out.

To figure out what the relevant statuses are, take your operating procedures and convert the process flows into state diagrams. This is fairly straightforward: every major step in the process flow becomes an arrow in the state diagram, and the states are the outcomes of each of the major steps in the process flow. Figures 3 and 4 show an example process modeled as a process flow and as a state diagram, respectively.

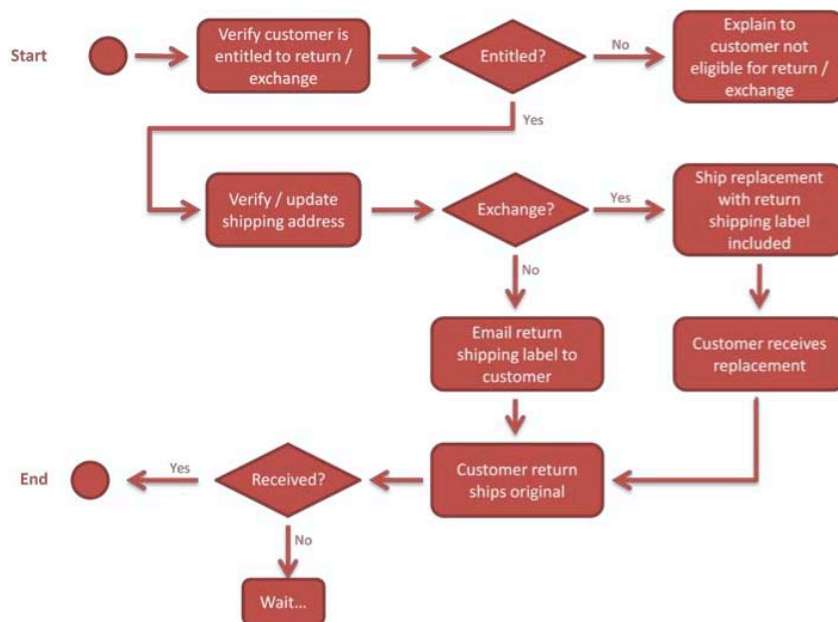


Figure 3. A typical return merchandise authorization (RMA) can follow this process flow.

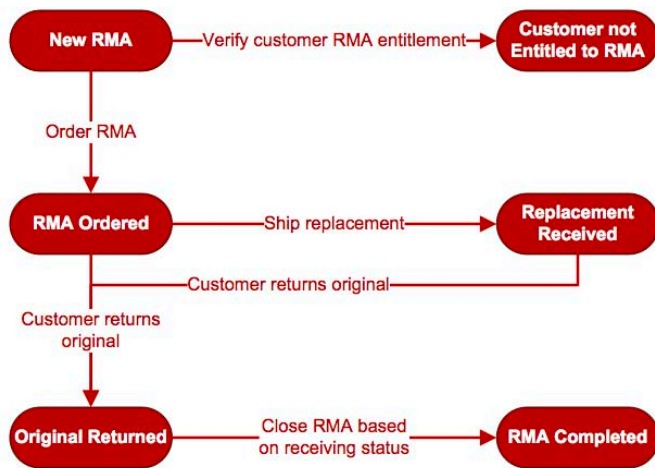


Figure 4. A typical RMA can follow this state diagram.

If you configure statuses that apply to some categories but not others, you can use workspace rules to show only the statuses that apply to the category at hand. Figure 5 gives such an example.

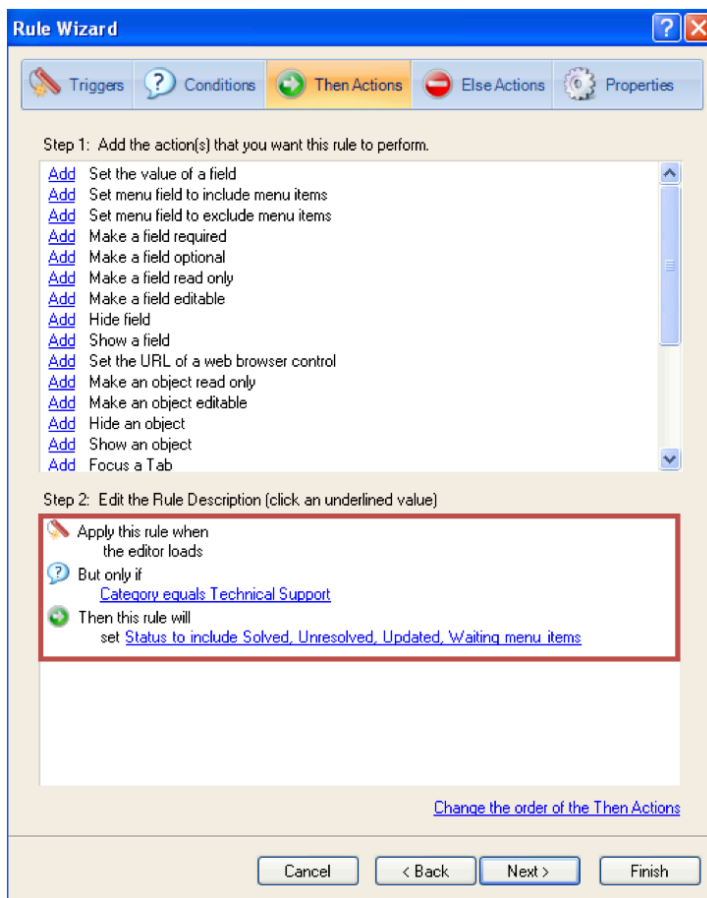


Figure 5. A workspace rule specifies which statuses to include for a selected category.

How far should you go in modeling process-specific statuses? Process-specific statuses are worthwhile if you want to do the following, for instance:

- Make routing or assignment decisions based on the status
- Show different tools or information based on the status
- Track completion at a given status

So why wouldn't you model each status of every operating process? Three primary costs are associated with excessive modeling of statuses:

- Agents would spend time setting the status correctly.
- It takes time for Oracle RightNow Dynamic Agent Desktop Cloud Service to process the rules for which statuses to show (even though each rule may take a minuscule amount of time, it would become a significant load on agent computers if the agents had to add the rules and statuses for every situation).
- Oracle RightNow CX Cloud Service administrators would need to maintain a large set of workspace rules with complex dependencies and overlapping conditions.

Note that if you use asynchronous channels such as e-mail, Web forms, or social media engagement, you will need to adhere to the status types corresponding to the various states of back-and-forth communication.

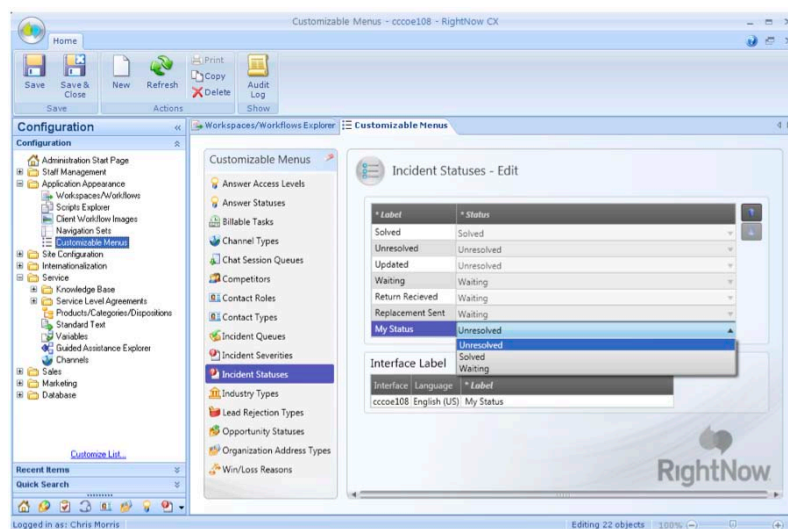


Figure 6. Set incident statuses with associated status types.

## Prescribe Workspaces Supporting Operating Processes to Agents

The primary function of an agent desktop is to support agents in the processes they carry out in each interaction. To do this, agents need access to the tools and information utilized in each business process provided to them in a way they can use easily across the full range of interaction categories they handle.



## Embed Tools in Agents' Workspaces for Carrying Out Processes at Each Stage of the Case

Whether agents are taking orders, troubleshooting, handling returns and exchanges, or fielding account inquiries, they need access to information and tools across the enterprise to meet the customer's need. Many organizations using Oracle RightNow CX Cloud Service take the approach of placing each of these applications on its own tab in a workspace. If they have more than a handful of tabs, they typically then go one step further and show or hide each tab, depending on the category (and other context), using workspace rules.

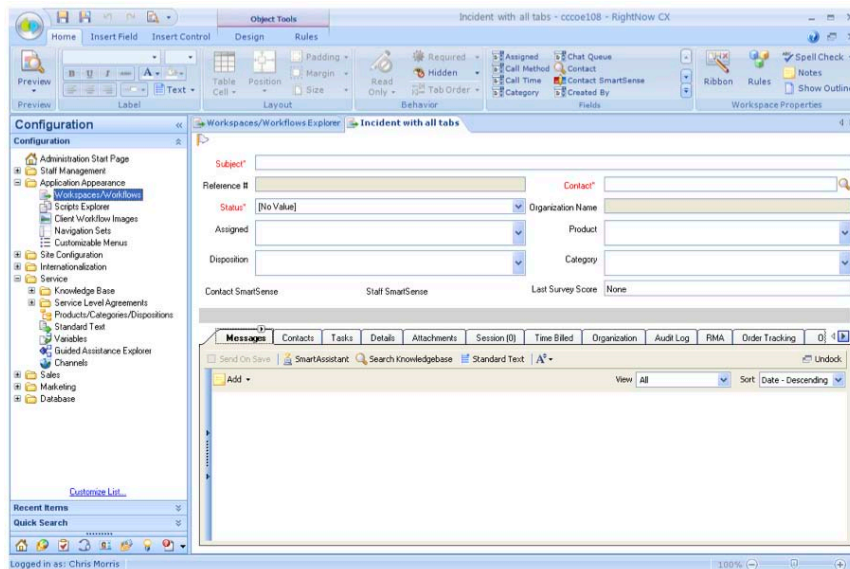


Figure 7. A workspace with many tabs can be improved with rules to hide/show tabs, depending on the category.

You might consider taking this one step further by decomposing each of these applications into the use cases or functions they support. For example, with an order system, you might provide agents with different screens, depending on the status of the incident.

- Unresolved: new order
- Order submitted: order status
- Order fulfilled: inventory status
- Order shipped: shipping status

Doing this will save agents from having to navigate within the embedded application and will result in reduced handle times as well as reduced training or onboarding costs.

If you reach the point where you have a dozen or more tabs in a workspace, along with 100 or more rules, you should consider specializing your workspaces by category. To do this, create a workspace for each major category, containing only the tools needed for that category, and then use desktop workflow to dynamically switch between workspaces based on the category.

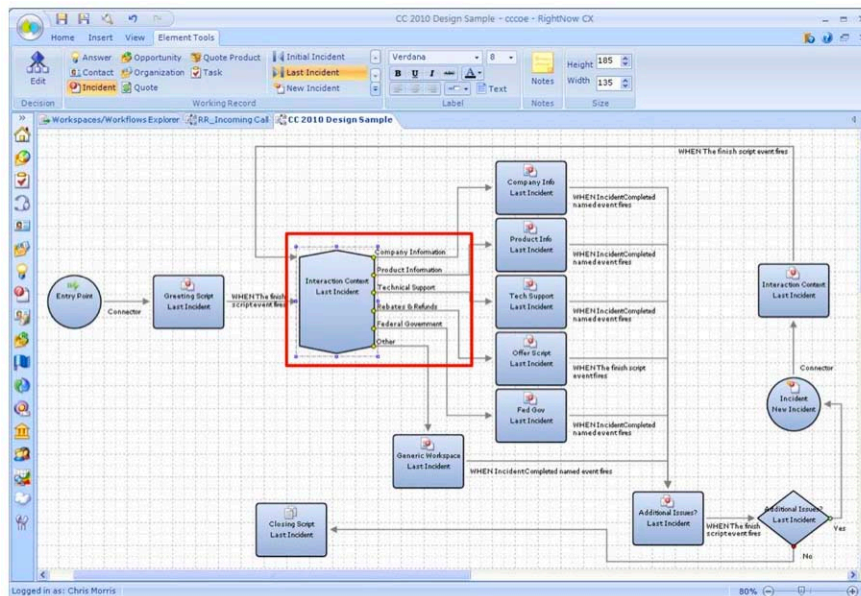


Figure 8. Use desktop workflow to switch between workspaces based on the category.

Oracle RightNow Dynamic Agent Desktop Cloud Service contains two methods for embedding other applications: using the workspace browser control (for Web-based applications) or using the .NET add-in framework (for all other cases.) For more information on desktop integration, visit the RightNow Community online.

### Use Agent Profiles to Grant Access to Workspaces Specialized for Each Tier and Group

Once you've configured the workspace(s) to support each of the major categories of incidents, prescribe them to agents via account profiles in the staff administration area of the management and configuration console.

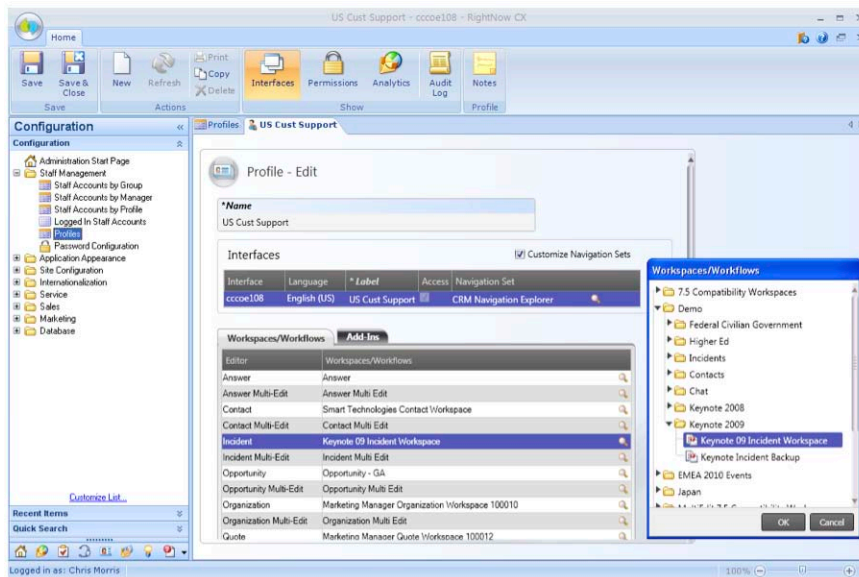


Figure 9. Prescribe a workspace/workflow to an agent profile.

Here you will prescribe all needed workspaces to agents—for working with contacts, incidents, opportunities, and so on. If you have specialized into multiple workspaces with desktop workflow, you can prescribe the workflow to agents just as with workspaces—simply select the desired workflow instead of a workspace in the profile editor.

If you have multiple agent profiles, you will need to prescribe workspaces for each profile. You can prescribe the same or different workspaces as needed. Depending on the degree of skills specialization in your contact center, you may have just a handful of workspaces or several hundred. The skills of agents at organizations using Oracle RightNow CX Cloud Service range from highly specialized to nearly universal. If you operate more toward the universal end of the agent skill spectrum, you will likely need to use desktop workflow to streamline the workspace in each situation to avoid overwhelming agents with too much information and too many tools.

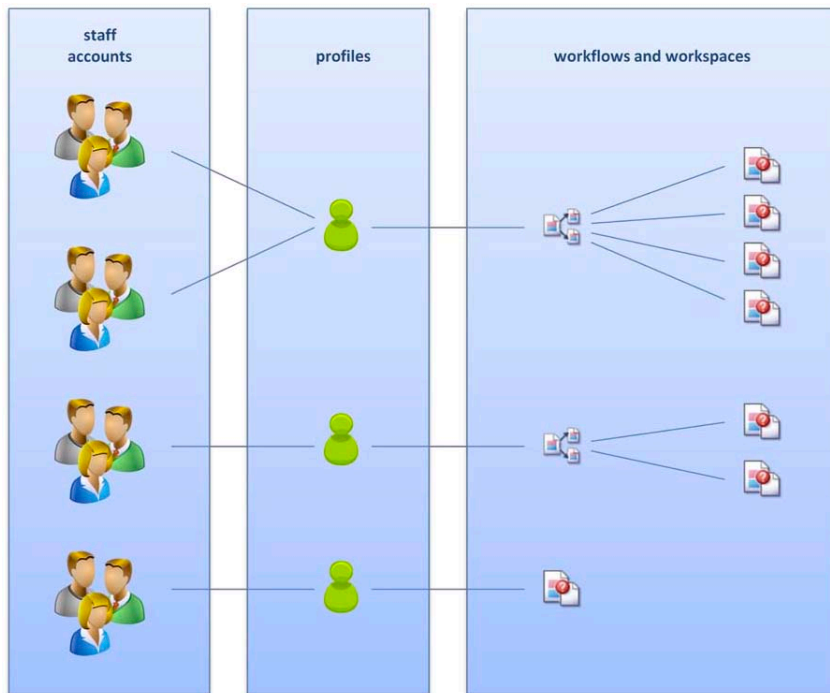


Figure 10. Map workspaces and workflows to profiles and staff accounts in Oracle RightNow CX Cloud Service.

## Integrate Agent Processes with Communication Channels

Most call centers operate in a tightly managed environment where calls are routed to agents in real time and they see a screen pop of relevant records or information about the call. This is very different from the world of an e-service center in which agents typically pull interactions (e-mails, questions from the Web, social media posts, and the like) from a queue or work through a list of interactions directly assigned to them.

### Integrate Communication Channels with the Desktop

In both cases, it is critical to integrate the communication channels with the desktop so that context is not lost and agent utilization can be managed. When integrating communication channels such as phone, e-mail, chat, Web, or social media, you need three things:

- **Screen pop or passing context.** Many organizations using Oracle RightNow CX Cloud Service will automatically pop the contact record or a specific incident based on selections made in the communication channel, such as information entered into an interactive voice response (IVR) system. Beyond this, organizations are passing an increasing amount of context from the communication channel, using custom fields and custom objects in Oracle RightNow CX Cloud Service.
- **Interaction controls.** In contact centers with more than 75 agents, Oracle recommends coordinating interaction controls such as a soft-phone or multichannel media bar with the agent. Coordinating interaction controls enables further valuable computer telephony integration (CTI)

such as automating the passing of context during warm transfers and consults as well as automating the closure of work at the end of the wrap-up period.

- **Logging and metrics.** Having the ability to analyze interaction volume and handle-time trends against the categories of cases handled is extremely powerful. Several organizations using Oracle RightNow CX Cloud Service are leading the way, with the help of Oracle-certified partners such as Interactive Intelligence to gain unprecedented insight into their operational metrics combined with Oracle RightNow CX Cloud Service data. If you have set a goal to increase first-contact resolution, combining communication channel metrics with data from Oracle RightNow CX Cloud Service is the best starting point.

### Configure the Desktop to Support Interaction Flows

Your typical interaction may include the resolution of one or more cases, creation of one or more incidents, presentation of one or more offers, and placement of an order. Interactions that fulfill more than one purpose dramatically increase the number of tools and the amount of information used by agents. If you've instituted the best practices in this guide, agents are using a highly tuned dynamic desktop environment with only one gap: it doesn't evolve with the interaction.

To close this gap, you need to understand the patterns of the interaction flow your agents follow and then support these flows (along with prominent variations on them) with desktop workflow. Figure 11 shows an example of how a relatively simple linear flow is supported by a corresponding workflow.

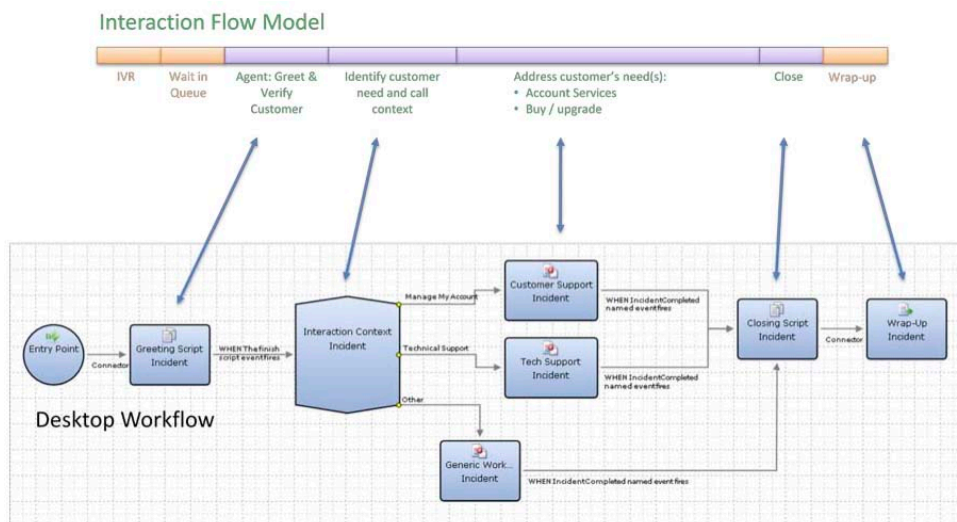


Figure 11. Map your linear interaction flow to a corresponding desktop workflow.

Via decision elements, desktop workflow can take different paths to match variations in agents' actual interaction patterns. Use decision elements to branch according to events, outcomes, and field values in the desktop workflow designer to implement the variations in your interaction flows.

## Test, Train, Deploy, and Refine

Configuring Oracle RightNow Dynamic Agent Desktop Cloud Service is an ongoing activity that follows the standard implementation cycle of an IT project, with one important difference: with the Oracle RightNow CX Cloud Service desktop, you can deploy changes without any system downtime. Because the configuration of workspaces, workflows, scripts, profiles, and navigation sets does not contain any custom software code, you can make changes to the desktop in real time without any service interruption.

Hence you need to be very rigorous in your operational change management processes (because in most cases, there will not be an IT project with a change management process to rely on.) If you're going to introduce changes to a workspace, you'll need to test the changes functionally, train agents about them, and finally deploy the changes (by prescribing the new workspace to each profile) in a controlled manner to mitigate the risk of inadvertently disrupting operations.

## Testing

The Oracle RightNow CX Cloud Service system has the ability to test contextual workspaces, agent scripts, and desktop workflows iteratively at design time, using the Preview function in each designer.

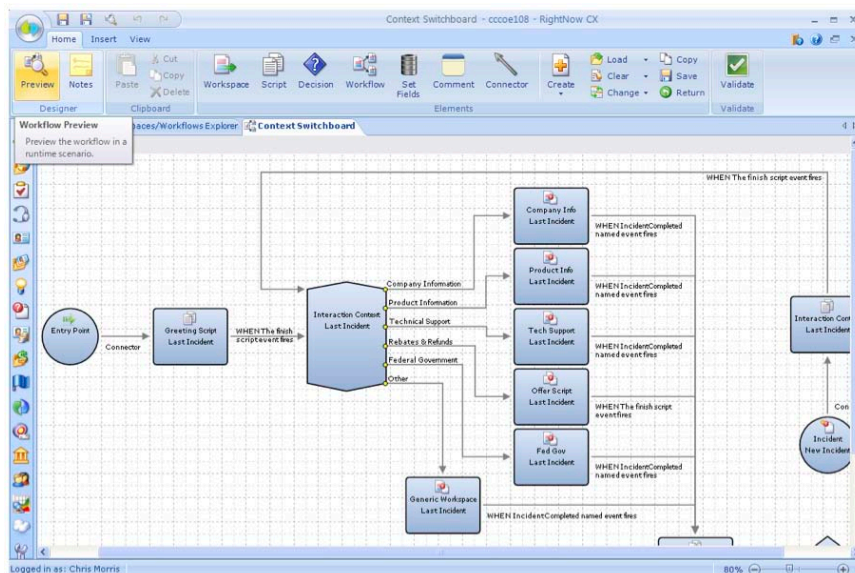


Figure 12. Use Preview for basic testing of workflows, workspaces, and scripts.

Depending on the level of testing you require, though, you may want to test complex items in a separate test instance of your solution. If your testing requires you to save test data, you should take the approach of testing in a nonproduction instance of your solution. To do this, you should

- Export the workspace or workflow definition (along with the definitions of any dependent objects) to your hard drive.
- Import the workspace or workflow and any dependent objects into your test instance.



- Prescribe the workspace or workflow to a test profile, and then begin testing with a staff account corresponding to this test profile.
- Ensure that any changes are either made to the original workspace/workflow and dependent objects in your production instance or are imported from the test instance before deployment. Objects that are exported from one instance of Oracle RightNow CX Cloud Service to another are not linked or synchronized in any way.

### **Training**

Whenever you make changes to agent workspaces, workflows, or subobjects such as scripts or guides, you will want to train agents on these changes. If the changes are minor, a simple notification may suffice. You can actually notify agents of minor changes right in the affected workspace(s), with instructive text and images. Alternatively, you can notify agents via a .NET add-in on the desktop that will guide them through the changes.

With more-substantial changes, you will need to train agents on how they will need to adjust their usage of the system. Although it is possible to train agents via a training account in your production instance, using a nonproduction instance of your Oracle RightNow CX Cloud Service solution is strongly recommended, so you can show modification of data without injecting fictitious data into your production environment. In many cases, you can use the test instance of your Oracle RightNow CX Cloud Service solution to also conduct the training. The only case in which this is not recommended is if your test instance is being used for multiple projects simultaneously—you may not want agents to see the changes from these other projects until they are fully tested.

### **Deploying**

Deploying changes to a workspace or a workflow is as simple as setting agent profiles to use the new workspace or workflow. If the changes require training, you can roll out the deployment of the new workspace or workflow immediately after the training session to the profile(s) of the agents in each session—you are not required to roll out the new workspace or workflow to all agent profiles at once.

The only consideration in a staged rollout is whether shared objects or data will be affected, corrupted, or lost by having agents using the new and old workspaces or workflows simultaneously. In the rare case when this is a risk, you would need to deploy the new workspaces or workflows synchronously.

### **Refining**

One of the great benefits of a highly configurable system such as Oracle RightNow CX Cloud Service is that you can continually refine the desktop and improve your operations. The best practices for refining your desktop configuration in production are as follows:

- Keep a copy of your production workspaces, workflows, and subobjects as backup (maybe labeling the folder “Backup”).
- Make a copy of your production workspaces, workflows, and subobjects that you can edit and refine without affecting the production versions of each (maybe putting them in a folder labeled “Work in Progress”).

- Agree on a standard location for production, backup, and work-in-progress objects, to ensure that anyone with access to the administration area knows your deployment processes and understands how to avoid making changes to production objects.

## Conclusion

Most organizations take an incremental approach to implementing new contact center experiences. Typically you take a look at your top interaction drivers used by your largest agent groups, by volume, and work down from there. Although you may take this phased approach, you will want to have a results-driven framework for prioritizing the implementation portfolio and measuring success. For this purpose, Oracle provides client success managers (CSMs) who are committed to helping you unleash the maximum value from Oracle RightNow CX Cloud Service. CSMs can help you prioritize implementation work, work with you to establish goals and measures, conduct quarterly business reviews with you, and arrange special engagements such as customer experience assessments—which can yield dramatic results. Oracle strongly recommends working with your CSM to apply best practices to get the most out of your Oracle RightNow CX Cloud Service solution.





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