Best Practices for Optimizing Oracle RightNow Dynamic Agent Desktop Cloud Service
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Introduction

This document is intended to serve as the first step in optimizing Oracle RightNow Dynamic Agent Desktop Cloud Service in order to improve first-contact resolution, customer satisfaction, and agent productivity. Implementing a good agent desktop user interface requires an understanding of your contact drivers—why customers contact your organization in the first place. This best practice guide describes how to map contact drivers to interaction categories, integrate primary agent systems with the desktop, and tailor workspaces for each agent group.

This guide was designed for use in conjunction with the Agent Desktop Tune-Up Checklist, available on RightNow Community¹, which provides you with a scorecard for grading your performance against the best practices. Assuming that you have both an existing Oracle RightNow Dynamic Agent Desktop Cloud Service deployment and a basic working knowledge of its essential features, this guide should take about an hour of focused time to work through. Depending on how you score in the associated Agent Desktop Tune-Up Checklist, you can identify additional projects to implement any changes to your deployment you want to make.

Many different methods and tools are available in Oracle RightNow CX Cloud Service for delivering improved agent experiences. Rather than focus on these methods and tools, this guide reviews the foundational building blocks needed to advance your understanding of your contact center. Some organizations may be able to complete this guide and the associated

¹ [http://community.rightnow.com/customer/support/tuneup.php](http://community.rightnow.com/customer/support/tuneup.php); click the Agent Desktop link.
checklist quickly, whereas organizations new to the ideas and concepts presented here may require additional time to understand, research, and measure their organizational processes. Oracle recommends that after you read this paper and work through the checklist, you review the findings with your customer success manager. For more information on the services provided by customer success managers, contact your Oracle account executive.
Understand What Drives Customer-Initiated Contact

The foundation for any successful contact center is insight into the underlying drivers that prompt customers to contact your organization. These contact drivers are the true root cause of each problem—without a careful method for categorizing and tracking these root problems, you will not be able to design effective policies and procedures to handle each problem category, let alone implement a good agent desktop user interface.

This may sound a little abstract to you, so take a look at Figure 1, a table that shows a carefully designed set of problem categories for classifying individual interactions, along with the volume of each interaction type.

![Workgroup Queue Statistics](image)

Figure 1. This report shows the top problem categories taken from an automated call distribution (ACD) line.²

For this particular product, a couple of drivers (installation problems and forgotten password) account for a high proportion of the inquiries. Taking a practical approach—investing time to formalize the agent steps that are successful in handling inquiries in these categories—will enable you to ensure that these categories are handled effectively across all agents. Such an approach results in the biggest net benefit for your business in terms of higher customer satisfaction, better agent productivity, and first-contact resolution.

Once you have defined these steps, you can implement an improved Oracle RightNow Dynamic Agent Desktop Cloud Service experience designed to efficiently tackle the highest-volume category. A word of caution: to avoid duplication of effort, don’t optimize your Oracle RightNow Dynamic Agent Desktop Cloud Service before you have insight into the problems you are trying to solve.

² Screen shot courtesy of Interactive Intelligence
Seven Best Practices for Optimizing the Agent Desktop

1. Track Your Interaction Volumes by Contact Driver

As mentioned above, having an understanding of the top contact drivers (the underlying reasons that are causing customers to contact you) and the associated interaction volumes (the total number of agent/customer phone calls, chat sessions, self-service sessions, or e-mails handled) is the first step to designing an effective agent desktop.

**Best Practice 1.1.** Track interaction volumes by contact driver for each of your supported channels. This list will often include

- Phone
- E-mail
- Web
- Chat
- Social channels

![Agent-Customer Interactions by Channel](image)

Figure 2. The Agent-Customer Interactions by Channel custom report can be downloaded from the RightNow Community (see the Agent Desktop Tune-Up Checklist for the link) and shows the number of agent/customer interactions associated with each channel.

**Benefit.** Insight into the top interaction volumes by channel is the fundamental building block for running a successful contact center. The information about contact volume and intent is what guides your management of contact center operations.
Best Practice 1.2. Use the same categories across all channels.

Figure 3. The Agent-Customer Interactions by Category custom report (see the Agent Desktop Tune-Up Checklist for the link) can be used to show interaction volume across all categories. In this example, technical support issues, with no subcategory, are the highest contact driver.

**Benefit.** The reasons customers contact your organization are independent of channel. You can infer the top contact drivers by looking at your current category mappings.

2. Map Contact Drivers to Interaction Categories

Once you have an intuitive understanding of your contact drivers, construct a list of Oracle RightNow CX Cloud Service categories mapped to the contact drivers.

Figure 4. The Products, Categories, and Dispositions editors help map categories to contact drivers.
Best Practice 2.1. Maintain interaction categories to match customer intent patterns.

**Benefit.** Misaligned categories can obscure your view into the root causes behind low first-contact resolution rates and low customer satisfaction. Having this view helps you not to miss key management insight into ground-level agent operations.

Best Practice 2.2. Use the unique **Products**, **Categories**, and **Dispositions** fields to track distinct interaction dimensions.

- **Product:** The product or service for which the customer is requesting support
- **Category:** The customer’s need or intent
- **Disposition:** The outcome of the interaction
- **Other:** A custom field for other information that needs to be represented (such as a region, a country, or a department)

**Benefit.**
- Separating categories from dispositions enables you to understand typical resolution in terms of customer need or intent.
- Separating products from categories enables you to accurately report on the shared versus dedicated activities for each product.
- Separating products from dispositions enables you to understand how best to resolve issues for each product you offer.

3. Define Logical Processes for High-Volume Categories

The highest-volume categories are the ones that benefit the most from defined and repeatable processes. A defined process helps in the preparation of agent training programs, by identifying appropriate materials, tools, and measures.

**Best Practice 3.1.** Document policies and procedures, and make them available to agents during training.

<table>
<thead>
<tr>
<th>Return Merchandise Authorization (RMA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Verify customer is entitled to return/exchange. If they are entitled, proceed to next step.</td>
</tr>
<tr>
<td>2) Verify/update shipping address.</td>
</tr>
<tr>
<td>3) Ship replacement with return shipping label included, or simply email return the shipping label for the customer to print.</td>
</tr>
<tr>
<td>4) Customer return ships the original.</td>
</tr>
</tbody>
</table>

**Figure 5.** Documentation of this process means that it can be made available to agents during training.

**Benefit.** The first-contact resolution rate will go up as agents gain an understanding of the steps required to solve customers’ problems.
Best Practice 3.2. Model policies and procedures as repeatable linear or branching flows.

![Flowchart of customer return process](image)

Figure 6. The same process as in Figure 5 has now been modeled to show the different logical branches associated with the basic task. During the modeling process, it often becomes clear that additional steps are required in order to successfully handle the interaction.

**Benefit.** Modeling interaction flows is essential to understanding how best to execute on customer interactions. Modeling flows enables you to align agent activities with customer needs.

Best Practice 3.3. Measure agent compliance through defined policies and procedures.

**Benefit.** Measuring agent compliance with corporate policies and procedures is often required for compliance with standards and regulations. In addition, measuring compliance provides critical insight into the efficacy of the policy as well as the guidance that agents receive in servicing interactions. With compliance measures in place, you are equipped to increase customer satisfaction (CSAT) and first-contact resolution (FCR) rates.

Best Practice 3.4. Define change management for policies and procedures.

**Benefit.** Avoid the confusion and disorganization that can result without these procedures.
4. Integrate Primary Agent Systems with the Desktop

Disparate systems in the contact center are a common barrier that interferes with agents’ ability to efficiently and effectively interact with customers. A completely unified agent desktop should always be the goal.

**Best Practice 4.1.** Embed applications used by agents into Oracle RightNow Dynamic Agent Desktop Cloud Service.

![Figure 7. An application for preparing orders has been displayed in Oracle RightNow Dynamic Agent Desktop Cloud Service by use of a workspace browser control on the Orders tab.](image)

**Benefit.** Displaying an external application inside Oracle RightNow Dynamic Agent Desktop Cloud Service is the first step to a unified agent desktop. This external application can be shown to agents when it is contextually appropriate and eliminates the need for them to leave the agent desktop to open other applications.

**Best Practice 4.2.** Coordinate applications used by agents within Oracle RightNow Dynamic Agent Desktop Cloud Service.
Benefit. Deeper integrations can be built to seamlessly coordinate disparate systems into a unified agent desktop.

5. Implement Optimized Workflows for Your Logical Business Processes

Once you have defined logical processes for high-volume interactions and have gathered all applications into a unified agent desktop, the next step is to implement these logical processes as optimized workflows within the agent user interface. Usability is a critical aspect that should be considered in the development of user interfaces for agents.

Best Practice 5.1. Implement processes that fulfill customer intent within Oracle RightNow Dynamic Agent Desktop Cloud Service.
Best Practices for Optimizing Oracle RightNow Dynamic Agent Desktop Cloud Service

Figure 9. This chart shows various tools available in Oracle RightNow CX Cloud Service to help you implement an optimized workflow.

**Benefit.** Implementing the processes used daily by agents on the agent desktop simultaneously reduces average handle time and guides less experienced agents to improve customer satisfaction.

**Best Practice 5.2.** Streamline highly repetitive processes.

![Table of Agent Processes and Tools](image)

**Standard Agent-Computer Interaction Times**

<table>
<thead>
<tr>
<th>Interaction</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move hand from keyboard to mouse</td>
<td>0.4 s</td>
</tr>
<tr>
<td>Point the mouse to something</td>
<td>1.1 s</td>
</tr>
<tr>
<td>Click the mouse</td>
<td>0.2 s</td>
</tr>
<tr>
<td>Move hand back to keyboard</td>
<td>0.4 s</td>
</tr>
<tr>
<td>Type a character on the keyboard</td>
<td>0.28 s</td>
</tr>
</tbody>
</table>

Figure 10. The KLM-GOMS\(^3\) framework can be used to show the average interaction time required for high-volume and repetitive tasks. These same tasks are key candidates for automation.

**Benefit.** Optimizing the efficiency of the most-repeated processes yields the greatest reduction in average handle time and reduces repetitive stress injuries.

**Best Practice 5.3.** Do not require wrap-up work.

Figure 11. Enabling agents to execute a Place Order command while communicating in real time with the customer saves the agent from having to manually copy data from one disparate system to another at the conclusion of the interaction.

**Benefit.** Wrap-up tasks are those that are often too slow or cumbersome to be accomplished during a live interaction. Automating them will result in higher agent productivity.

6. Tailor Workspaces for Each Agent Profile

Different groups of agents, such as Tier 1, Tier 2, and Tier 3, benefit from having access to customized user interfaces for their own specific needs. This type of segmentation can also occur if you have different groups of agents for different interaction categories—for instance, an outbound sales agent will need a different user interface than an inbound service agent.

**Best Practice 6.1.** Provide agent profiles with the tools and information those agents need for handling their own specific interactions.
Figure 12. This Staff Accounts by Profile report shows a list of different agent profiles that have unique workspaces.

**Benefit.** Grouping specific workspaces makes agents more effective in their job. Forcing all agents to share a single flattened agent desktop can cause clutter and confusion and result in lengthy training times and poor policy adherence.

**Best Practice 6.2.** Provide all agent profiles with an appropriate level of real-time guidance for the particular agents' skill level.

Figure 13. Oracle RightNow Guided Assistance Cloud Service can be used to provide step-by-step instructions for new agents. Using it is a perfect way to help relatively new agents follow the proper policies and procedures.

**Benefit.** When agents do not receive needed guidance, they will be unable to efficiently assist customers. Conversely, when agents are excessively constrained, they will struggle to provide a personalized experience. Providing the appropriate level of guidance can allay these concerns.
7. Tune the Knowledgebase for Agent Use

A comprehensive but highly organized knowledgebase helps empower agents to solve a customer’s issue on the first interaction. Although the same knowledgebase can be used for agents as well as customer visitors on the Web, it is important to design it to work well for both constituencies.

**Best Practice 7.1.** Optimize your knowledgebase to serve agent-specific needs.

**Benefit.** A properly organized knowledgebase is essential to help agents locate important information, in contrast to a disorganized knowledgebase, which will result in agents’ being unable to find the information they need.

### Conclusion

Now that you are familiar with Oracle RightNow Dynamic Agent Desktop Cloud Service best practices, using the Agent Desktop Tune-Up Checklist to perform an assessment of your deployment against these best practices will enable you to see where you have the greatest opportunities for improvement.

Note that these best practices are intended to be used as rules of thumb. If you have customer research or firsthand usability testing that suggests a different approach, your data should supersede the recommendations you have found here.