

# ORACLE DAILY BUSINESS INTELLIGENCE FOR QUOTING

## KEY FEATURES

### FLEXIBILITY TO ENHANCE INSIGHT AND PERSONALIZATION

- Top Quotes provide additional key information
- Approval summary by sales group
- Detail description for form function name for easy personalization
- Analyze total quotes for a particular customer, sales group, or product category
- Monitor quote conversion performance for sales group and product category
- Compare quote conversion performance for current period and prior periods
- Receive daily reports in minutes with daily summarization architecture
- Access intelligence reports and application forms immediately with customized related links
- Monitor different level of discounts that are offered to customers
- Break down different discount brackets by key quote performance measures and examine their impact to business
- Observe trends over time periods of weekly, monthly, quarterly or yearly
- Perform comparisons for key quote performance measures
- Compare performance today with the prior period or the same period a year ago

*Oracle® Daily Business Intelligence (DBI) for Quoting is a management reporting solution for sales managers to analyze the quoting process and identify performance in such areas as discount impact, quote conversion performance, and approval process efficiency.*

### Optimize the Quote-to-Order Process for Your Business

Oracle DBI for Quoting provides a comprehensive set of analytics that allow you to optimize the quote-to-order process. Measurements and reports are updated daily to provide the most recent quote analysis of an enterprise's business.

Oracle DBI for Quoting comprises series of Key Performance Indicators (KPIs), trend graphs, summarized tables, and personalized links presented in an easy to use set of pages. These pages provide analysis such as quote-to-order conversion performance, quote summary breakdown, quote approval review, and discount impact summary. DBI for Quoting is tailored for sales managers who have the direct responsibility to ensure that the quote-to-order process is optimized. Users can analyze the sales force's ability to convert quotes to orders, study the discount impact to quote conversion performance, optimize the approval process, and examine top quotes by key customers. Moreover, Oracle DBI for Quoting offers intuitive trend graphs and a historical comparison capability that allows for easy review of the summarized information.

### Daily, Centralized View of Quote-Focused Analytics

In order to efficiently convert quotes to orders, sales managers need a comprehensive set of analytics that reveals all the intricacies of the quote-to-order process. It not only needs to be complete (instead of scattering data across various applications), it also needs to be delivered on a daily basis so sales managers can make mission critical decisions when necessary. Oracle DBI for Quoting provides daily, advanced analytics on quote-focused measures to monitor the entire process and identify key bottlenecks (Figure 1).

The capability to view daily summarizations ensures that sales managers will know at the beginning of each day exactly how the sales organization is performing against quote metrics. Daily summarization enables sales managers to spend minutes – not days – gathering important information about the business.



**Figure 1: The Quote Management Page provides sales managers quote-focused analytics including total quotes, converted quotes performance, approval efficiency, and impact of discounts.**

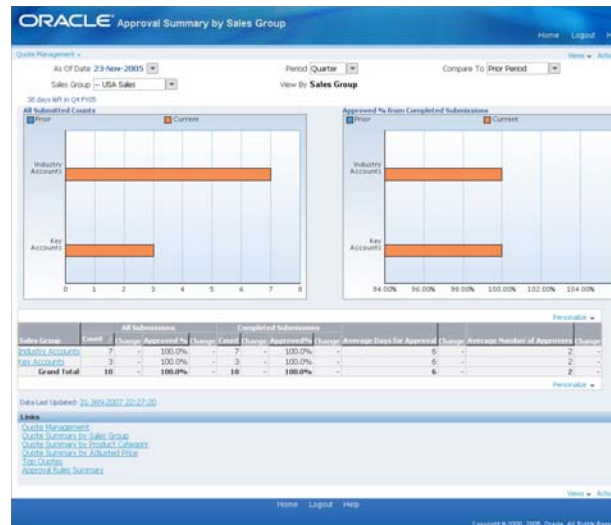
Oracle DBI for Quoting a simple web interface to view key quote transactional data against company KPIs:

- Key Performance Indicators that provide quote-focused analysis such as total quotes, converted quotes, average days to convert, approval %, and average days for approval. Additionally, it contains sales group comparison indicators to show the performance of the sales manager’s direct reports relative to one another.
- Pre-built comparative analysis reports. Comparisons can be done across many dimensions such as:
  - Compare present period’s performance with last period or same period last year
  - Organizational comparisons across the enterprise in both functional and global currencies
  - Trend data over periods of weekly, monthly, quarterly or yearly
  - View period-to-date results for any day or time period in the past

### Understand and Improve the Quote Approval Process

Approving quotes can be time consuming because it is often handled manually through multiple layers that can create a slow quoting process. Oracle Quoting provides the ability to automate quote approvals on a per quote basis. DBI for Quoting uses data from Oracle Quoting to provide a summary of multiple quoting approval transactions for in-depth analytics that can be used to identify quote approval bottlenecks. This combination of visibility and analysis drives faster quote

conversion, higher revenue to business, and greater customer satisfaction.



**Figure 2: The Approval Summary report contains key metrics that identifies bottlenecks in the quote approval process and comparison measures that compare current performance against historical performance**

Additionally, Oracle DBI for Quoting comes with a unique set of reports that looks into the efficiency of approval rules. For example, a sales manager can unintentionally set up an approval rule that requires him/her to approve 95% of the quotes. Clearly, this is not efficient and can cause significant impact to the business over time. Without adequate insight into the efficiency of approval rules, sales managers will not be able to understand or address this type of issue. Oracle DBI for Quoting contains an Approval Rules Summary report (Figure 2) that identifies approval rules that are most and least applied in the approval process. By having this knowledge, sales managers are able to validate existing approval rules for increased quote processing efficiency.

### Analyze the Impact of Discounts on Quote Conversion

How much discount the sales person offers heavily influences the likelihood of a quote converting to an order. The practice of discounting builds customer loyalty and increases customer's propensity to buy. However, without adequate analysis of the impact of discounts, sales managers are not able to understand the true effectiveness of the discount strategy. Additionally, sales managers need to know if they are protecting the underlying margin with discounts offered to customers. Oracle DBI for Quoting provides detailed analysis on the impact of discount. It provides the sales manager with the following:

- Summary tables that break down quote information by measures such as total quote amount, total number of quotes, converted quote amount, and converted quote % by different brackets of discount percentages. Additionally, it contains comparison measures that evaluate the current performance against performance from last period or same period last year.
- Graphs on Converted Amount % by Discount and Converted Count % by

**KEY BENEFITS**

## WITH ORACLE DBI FOR QUOTING YOU CAN:

- Lower quote processing cost through quote bottleneck analysis
- Increase customer satisfaction through detailed approval analysis
- Increase margins through detailed quote discount analysis

## RELATED PRODUCTS

The following products are available from Oracle and enable companies to further enhance their Order Management Processes:

- Oracle E-Business Intelligence
- Oracle Quoting
- Oracle iStore

## RELATED SERVICES

The following services are available from Oracle Support Services:

- Oracle E-Business Suite Accelerators
- Oracle On-Demand
- Product Support Services
- Update Subscription Services
- Oracle Consulting Services

Discount show the distribution of converted quotes relative to different discount brackets. Like the summary tables, they contain comparison measures that evaluate the current performance against performance from last period or same period last year.

Moreover, with the ability to drill seamlessly to Order Management and Product Intelligence reports, sales managers are able to discover additional information that would determine if they are protecting the product margin by the discounts offered.

**Personalized Related Links**

Related links can be customized to all intelligence and applications functions and reports, including tabular and graphical representations of sales data, trends, links to menus, as well as both internet and intranet web pages. By personalizing the DBI for Quoting page, all necessary measurements and reports are provided on a daily basis, and in one location, so the sales managers and executives can make informed decisions.

**Deploy Out of the Box**

DBI for Quoting is both straightforward and simple to implement. DBI utilizes existing set-ups and terms that have been used in existing Oracle Applications. The result is a streamlined reporting solution that can be used almost immediately to provide an enterprise's *daily measurements*.

**Drill Directly to Transactions**

DBI for Quoting completes the circle from summarization to granular detail by drilling into the transactions that contributed to the key performance measures. This allows users to identify and view the specific transactions that are behind the aggregation to answer the questions that arise.

**Oracle E-Business Suite—The Complete Solution**

Oracle E-Business Suite enables companies to efficiently manage customer processes, manufacture products, ship orders, collect payments, and more—all from applications that are built on a unified information architecture. This information architecture provides a single definition of your customers, suppliers, employees, products—all aspects of your business. Whether you implement one module or the entire Suite, Oracle E-Business Suite enables you to share unified information across the enterprise so you can make smarter decisions with better information.

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