

ORACLE DAILY BUSINESS INTELLIGENCE FOR SALES

KEY BENEFITS

- Provide Sales Management with a summary and detailed view of sales information
- Understand and improve sales performance
- Analyze the evolution of sales opportunities over time
- Compare sales forecasts to pipeline performance
- Manage the revenue backlog from orders to recognized revenue
- View recognized revenue in context of sales performance
- Monitor sales performance with drill down into top and bottom sales achievers

Oracle® Daily Business Intelligence (DBI) for Sales is an interactive, self-service management reporting solution for sales managers and senior executives. It provides comprehensive forecast analysis, revenue backlog information, opportunity activity review and sales force performance metrics. DBI for Sales offers enhanced sales visibility by providing enterprise-wide performance information daily. DBI is part of the Oracle E-Business Suite, an integrated set of applications, which is designed to transform your business into an e-business.

Understand and Improve Sales Performance

The focus on performance measurement has become a priority in more and more leading companies. While companies strive to optimize their sales processes, there has been little visibility into the effectiveness of these initiatives. Many businesses have realized substantial gains from improving their business processes and implementing sales tracking systems, but executives do not have the management reporting they need to effectively run their companies. Senior executives and sales managers need timely, complete and relevant information to manage their operations.

DBI for Sales provides a collection of enterprise sales indicators, daily aggregated information with actionable details, and multi-dimensional and comparative analysis capabilities. It provides comprehensive measures for actively monitoring the sales forecast, pipeline and revenue backlog. DBI provides reliable, relevant information directly from mission-critical business applications, freeing executives from error-prone and time-consuming spreadsheets. It offers intuitive trend graphs and prior period comparison capabilities that help to easily identify critical issues with current and historical sales performance. The end result is rich comparative information with unparalleled levels of actionable analytics across the sales organization. Using DBI for Sales, managers have comprehensive, integrated and up to the day information to improve sales execution and meet strategic objectives.

Optimize your Sales Organization

In today's high velocity business, it is challenging to respond to the day-to-day changes that impact sales and revenue performance. Using DBI for Sales, CEOs, General Managers, Sales Executives and Sales Managers can realize their sales and revenue goals with information that enables them to:

- Analyze the Evolution of Sales Opportunities Over Time
- Compare Sales Forecasts to Pipeline Performance
- Manage the Revenue Backlog from Firm Orders to Recognized Revenue

Analyze the Evolution of Sales Opportunities Over Time

Sales data by nature changes over time. The dynamic nature of the sales process means that an opportunity could be initially lost, but eventually won, within its lifecycle. Similarly, an opportunity value could change from \$1 million to \$10 million over time. Most sales reporting applications only present the latest view of sales data and fail to provide the complete history of its evolution. Sales managers and executives must have the ability to review the full history of sales transactions—not just at a single point in time, but within the context of all changes. Sales executives require an understanding of what changes occurred in an opportunity’s status, amount, and win probability over its entire lifetime. Since these changes drive the movement of the sales pipeline, a better analysis of the development of individual opportunities, as well as the sales pipeline as a whole, helps to calibrate expectations for future sales performance.

Oracle DBI for Sales (Figure 1) shows how the sales forecast has changed over time along with the ability to compare the information to the previous week, month, quarter or year. It allows the user to compare forecasted sales to actual wins alongside in-depth analysis of trends in predictive numbers—for example, a tendency to over- or under-state what really transpires in the business—over time.

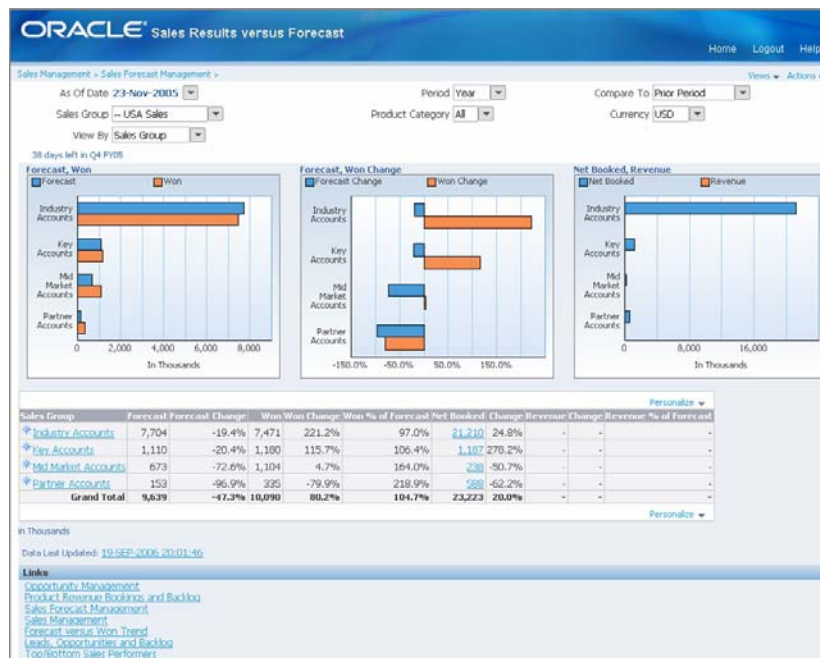


Figure 1: Time parameters such as the ‘As-of-Date’ parameter (top left) allow you to analyze the evolution of the historical sales data and compare it with performance from last period or same period last year

Through these time parameters provided in DBI for Sales, sales managers and executives are able to address the following key questions:

- How many open opportunities were moved out of the quarter? How much has been added to this quarter?
- How has the seasonality of the market impacted my sales pipeline? Did we experience the same behavior last year?

- What was the pipeline amount that the sales organization expected to close at the beginning of the quarter? How has it changed at the end of quarter? Why?
- What were the historical changes for my Top Opportunities? How have these changes impacted the sales pipeline for the quarter?

Oracle DBI for Sales delivers concise and powerful insight into how the sales organization is performing on a daily basis. It empowers sales management to make better decisions based on fact, rather than guesswork.

Comprehensive Forecast and Pipeline Analysis

Often considered as the most important task in sales, the ability to create accurate sales forecasts depends on the availability of comprehensive forecast-driven analysis. Sales managers and executives must be able to compare the current and historical sales data across multiple criteria such as sales group and product category in order to understand forecast accuracy. Oracle DBI for Sales provides KPIs and measurements that enable sales managers and executives to gain the necessary insight for more accurate forecasts. Improved understanding of the accuracy of the forecast not only eliminates the impact of providing false expectation to public or private investors but also optimizes sales force's efficiency by establishing challenging, but still realistic, sales targets. Measures on a sales group's forecast, a direct report's submitted forecast, and the historical sales pipeline provide comprehensive visibility into the sales force's performance.

Analyze Revenue Backlog Trends and Details

Using DBI for Sales, sales managers and executives can follow the course of potential revenue from firm orders, to invoicing and all the way to the revenue recognition process. Managers can view the Net Product Order Backlog metric (Figure 3) to understand the value of orders that have been booked but not yet invoiced and can drill to the details of specific order transactions from within management reports. The net value of booked orders—including the impact of returns—can be tracked for the whole company, a specific sales group, an individual sales representative, a particular customer or a product category. The contribution of deferred product revenue to the revenue backlog can also be viewed in detail. The revenue backlog can be seen in light of recent trends therefore improving the understanding of potential revenue and providing the relevant data available to make appropriate adjustments in revenue expectations or sales programs.

Understand 'Forecast versus Pipeline' Comparison

In order to conduct accurate forecast, sales managers and executives must have a clear understanding of forecasts made in the past and how they performed against the historical pipeline. Therefore, sales managers and executives need measurements on sales groups' and direct reports' submitted forecast, summary reports on sales results against forecast, insight on the impact of top opportunities on the pipeline, and intuitive trend graphs that show the comparative performance for the forecast against the pipeline (Figure 2).



Figure 2: The Sales Forecast Management overview page provides sales forecast information including sales group and direct reports forecast, forecast versus won trend graph, and top open opportunities with drilldown capability to individual opportunities at the transaction level. Forecast driven analytics provided within Oracle DBI for Sales equips sales managers and executives with:

- Sales Forecast Management KPIs to quickly measure the overall forecast for the sales group and forecasts submitted by direct reports along with comparison against the pipeline and period-to-date won opportunities.
- The “Forecast versus Won” graph to understand the cumulative trend of the won opportunities with comparisons to historical forecasts submitted for the sales group and the direct reports.
- The “Forecast Overview” to break down the forecast, weighted pipeline, pipeline, and won data by sales group and product category.
- The “Top Opportunities” table, with visibility to the actual transaction, to identify the key opportunities that could carry significant impact to sales force’s expected target.

Managing the Revenue Backlog on a Daily Basis

Although sales leads and opportunities are important indicators of potential sales, sales managers and executives also require visibility into potential revenue as it moves through the “order to revenue” stream. DBI for Sales provides daily insight into individual sales team’s and company-wide bookings and the resulting revenue performance by reporting directly on the transactional information from the Oracle Order Management and Accounts Receivable applications. Executives and managers have access to comprehensive, timely data to manage their revenue pipeline, answering questions such as:

- How much business has been booked and has it been invoiced?
- How much revenue has been recognized versus deferred?
- Am I recognizing revenue more from backlog or new sales?
- Is my potential revenue increasing or decreasing?



Figure 3: The *Product Revenue Bookings and Backlog* overview page provides comprehensive measures of all aspects of the revenue backlog including net booked, booked but not invoiced, deferred and recognized revenue.

View Recognized Revenue in Context of Sales Performance

The revenue number is a critical indicator of corporate and sales performance. Executives want to know more than simply the amount of revenue that has been recognized for a given period. They want to understand the amount of revenue coming from new business versus business from a previous period. Understanding where these measures stand in relationship to one another provides immediate insight in to how the business is performing on an operational level. Using DBI for Sales, it is possible to see revenue performance for a specific sales group, customer or product category along with comparisons across years, quarters, months or weeks.

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 Sales Pages and Reports, all the necessary measurements and reports are provided on a daily basis, and in one location, so the sales managers and executives can make informed decisions.

KEY BENEFITS

- DBI for Sales is an extensible, easy-to-deploy analytical solution
- DBI for Sales provides sales users, managers and senior executives' critical information to help increase revenue
- With Sales for DBI, Sales managers have the most comprehensive, integrated and up to the day information to improve sales execution and meet strategic objectives

RELATED PRODUCTS

The following products are available from Oracle:

- Oracle Sales
- Oracle Telesales
- Oracle Proposals
- Oracle Sales Offline
- Oracle Sales for Handhelds
- Oracle Incentive Management

RELATED SERVICES

The following services are available from Oracle Support Services:

- Oracle E-Business Suite Accelerators
- Oracle Application Solution Centers
- Oracle University
- Oracle Consulting

A Complete, Extensible, Easy-to-deploy Analytical solution

DBI for Sales is an out-of-box, easy-to-deploy analytical solution. It utilizes data, configuration and security setups that already exist in Oracle E-Business Suite. The result is a streamlined reporting application that offers visibility into aggregated summary information as well as easy navigation to the granular transaction details that support further investigation of the KPIs. The reports and metrics work directly with data in Oracle Applications without requiring a separate-reporting infrastructure. The result is a streamlined reporting application that can be used almost immediately to provide an enterprise's daily measurements.

DBI's 'drill and pivot' feature provides users the capability to dynamically slice and dice information within a report. DBI is also extensible. Users can create new KPIs, reports, or rename, rearrange existing KPIs and reports to meet business needs. New content added to DBI Dashboards will persist through version upgrades, for maximum ROI and reusability. DBI also provides the multi-threading capability to optimize data collection performance on multi processor machines.

DBI completes the circle from aggregation 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 any questions that arise.

Summary

DBI for Sales is an extensible, easy-to-deploy analytical solution for your sales organization. DBI for Sales provides sales users, managers and senior executives with critical sales revenue and comprehensive forecast information to improve sales execution and assist the sales organization to meet strategic objectives.

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 unified information architecture. This information architecture provides a single definition of your customers, suppliers, employees, and products—all important 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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