

PEOPLESOFT ENTERPRISE SMARTVIEWS



*Understand your
customers' value.*

Focus your resources.

Measure the results.

Realizing that customers are your greatest assets, and investing in them accordingly, is the key to customer relationship management. Maximizing the returns on your investment is just as important—and can be much more of a challenge.

The way to receive the highest returns is to match corporate goals to customer requirements. This requires gaining better visibility into your customers' needs and strategic value, and then using the information to create a well-defined strategy for each of your customer segments. Ideally, you should segment customers into “portfolios,” much as you would organize other assets, and associate each group with a set of measurable customer management metrics from across the enterprise. This, in turn, will allow you to manage and optimize different types of customer relationships on a proactive basis.

You can achieve this level of business value with Oracle's PeopleSoft Enterprise SmartViews. PeopleSoft SmartViews give you the real-time visibility into your most important assets—your customers— so you'll be able to invest where you'll receive the greatest return.

Understand Your Customers' Values

PeopleSoft Enterprise SmartViews serve as a customer management dashboard that allows you to visualize and manage a group of customer segments or portfolios according to your choice of enterprise metrics. PeopleSoft Enterprise SmartViews are designed to work with a full range of segmentation tools— ranging from simple, “just getting started” approaches embedded in every transactional application to sophisticated solutions that leverage behavior modeling, predictive analytics, and multidimensional analysis.

PeopleSoft Enterprise SmartViews can be used to create a set of shared customer segments that can be leveraged across the enterprise. Each team or department can tailor their individual SmartViews to their business needs while retaining the integrity of a set of common enterprise customer definitions. This holistic view of the customer base across the enterprise ensures consistency throughout the customer lifecycle and across multiple customer interaction channels.

Portfolio	Percent Renewed Status	Percent Renewed Value	Percent Renewed Count	Customer Satisfaction Status	Customer Satisfaction Target	Customer Satisfaction Actual
Customer Value Segmentation (437)	●	890	930	●	90%	95%
Customer Value Segments (437)	●	163	930	●	90%	90%
Platinum Agreements	●	350	310	●	90%	80%
90 Days Left	●	200	210	●	90%	90%
120 Days Left	●	50	45	●	90%	90%
180 Days Left	●	50	55	●	90%	90%
Gold Agreements	●	90	620	●	90%	90%
90 Days Left	●	60	220	●	90%	90%
120 Days Left	●	125	100	●	90%	90%
180 Days Left	●	50	25	●	90%	90%
Silver Agreements	●	36	50	●	90%	90%
90 Days Left	●	29	45	●	90%	90%
120 Days Left	●	122	200	●	90%	90%
180 Days Left	●	88	75	●	90%	90%

Example of a Service SmartViews

Service managers can use PeopleSoft SmartViews to easily group customers into segments and measure important targets and goals per customer. These can include contract renewal programs, product return processes, and managing customer satisfaction, escalation, and cost-to-service metrics.

At the same time, PeopleSoft Enterprise SmartViews offers individuals and departments the flexibility to view customers and segments based on personalized templates while providing open access to enterprise metrics. The result is not only a single view of the customer across the enterprise but also a deeper understanding of what motivates that customer based on their buying habits, needs, demographics, and other key insights. For example:

- Sales managers can use Sales SmartViews to build alignment on their teams. They can easily create PeopleSoft Enterprise SmartViews with targeted customers that include all critical sales accounts or territories, and then they can measure them according to a set of key metrics, such as customer calls, units sold, or forecasted and actual revenue.
- Service managers can use Service PeopleSoft SmartViews to easily group customers into segments and measure important targets and goals per customer. These can include contract renewal programs, product return processes, and customer satisfaction, escalation, and cost-to-service metrics management. Service Managers may also use SmartViews to get a sense of the health of their call center using overall responses reports. These reports contain a set of aggregate response to customer survey questions. The overall score of these responses conveys how well the company is doing in the customers' eyes or the customer's disposition by looking at a single data point and then digging down further for more details.
- Marketers can use Marketing PeopleSoft SmartViews to gain an overall picture of the customer base by creating and managing portfolios of customers based

on behavior, needs, products, and geography. These capabilities give marketing departments the flexibility to manage and adapt their programs around a defined set of customers and metrics—without assistance from IT.

- Partner program managers can use Partner PeopleSoft SmartViews to create a systematic approach to monitoring partner effectiveness and actively managing the entire portfolio of partner relationships. This is especially important for partner programs, which traditionally have been plagued with poor ROI due to lack of visibility into channel sales and the time-consuming process of program administration. By employing a Partner SmartViews strategy, you create a winning combination of higher revenue, greater customer satisfaction, and lower operating costs.

Offer the Right Value Propositions to the Right Customers

With PeopleSoft Enterprise SmartViews, an organization can access critical metrics about the customer base on one page, including profitability, goals, and key performance indicators. For the first time, you can see the overall value, cost, needs, and profit of a customer segment and you can drill down into individual accounts and guide business plans accordingly—all from a single source.

Portfolio	Total No. Responses	Total No. Resources	Comparison Rate Status	Comparison Rate
Customer Value Segmentation (432)	475,825	438,816	2.0	2.0
Customer Value Segments (432)	475,825	438,816	2.0	2.0
Prospect collections (122)	48,150	34,756	1.2	1.2
1st year (11)	12,500	9,200	1.5	2.0
2nd year (20)	15,000	19,809	1.0	0.8
3rd year (70)	20,050	10,345	1.0	1.0
Single Buyers (208)	147,175	124,975	3.0	2.9
West (90)	100,125	86,040	4.0	4.0
Midwest (50)	20,000	8,900	3.0	2.5
Northeast (42)	15,000	17,005	3.0	3.3
Southeast (20)	12,050	13,980	2.0	1.8
Married Buyers (81)	150,000	178,098	2.5	3.0
affluent Buyers (9)	130,500	100,967	1.5	1.0

Example of a Marketing SmartViews

Marketers can use Marketing SmartViews to get an overall picture of the customer base by creating and managing portfolios of customers based on behavior, needs, products, and geography. These capabilities give marketing departments the flexibility to manage and adapt their programs around a defined set of customers and metrics— without assistance from IT.

For example, you can use our segmentation tools to create the following portfolios:

- High-Value Customers: A high actual and potential value, coupled with relatively low cost to service, may lead to a retention strategy.

- **High-Potential Customers:** A high potential value, medium actual value, and low cost to service may lead to a development strategy.
- **Underperforming Customers:** Lack of profitability may lead to a strategy to move these customers up the value chain. Creating portfolios like these makes it possible for you to proactively identify strategies and plans designed to maximize return on customer relationships, either by segment or by individual accounts.

Through integrated action links that provide two-click access to Strategic Account Planning, Online Marketing, and Marketing applications, PeopleSoft Enterprise SmartViews enables you to define account plans, generate online campaigns, and create multichannel marketing programs. Once these are in place, you can monitor the results—as they execute—from a single view.

Building on the earlier example, a company may develop specific strategies for each level of customer as follows:

- **High-Value Customers:** Establish business rules to retain the customer base by escalating service to the highest levels of support, creating strategic account plans to ensure sales coverage, and focusing on customer loyalty.
- **High-Potential Customers:** Establish business rules to help grow and develop the customer base by personalizing service, triggering proactive sales calls, and initiating targeted cross-sell marketing activities.
- **Underperforming Customers:** Establish business rules to increase profitability of the customer base by reducing costs through self-service or automated response and increasing revenue through targeted up-sell activities.

We then provide the applications necessary to proactively manage and monitor customer value. You can track performance at a glance using SmartViews or set up performance-based, real-time alerts and notifications that enable you to take action and make mid-course corrections.

Turn Insight into Action

PeopleSoft Enterprise SmartViews brings together customer analysis from across the enterprise into a fully integrated solution that focuses your company around its customers. As a result, it's easy to measure and track key customer segments based on your most important value metrics, including cost, revenue, wallet share, and target for each customer and segment. Every metric includes targets, goals, and attainment numbers to allow you to compare actual results to goals and quickly assess the success of your strategies.

We turn this insight into action through the Active Analytics Framework (AAF). Our real-time decision engine, embedded within transactional systems, allows you to enforce your strategies and best practices across all customer touch points. Based on key customer metrics, AAF automatically makes suggestions to ensure best practices at the point of contact. Actions can be pushed through all channels and multiple mediums—including on-screen alerts, email, agent recommendations, and integrated processes. AAF is smart in that it can self-correct to achieve consistently

optimal results.

For example, these capabilities enable sales representatives to better focus on key deals and accounts that represent the greatest revenue potential at the lowest cost, or the highest risk of defection. Customer service representatives can spend their valuable time with high-value customers and point others to more cost-effective options like self-service. And, by utilizing the ability to take action at the point of interaction, marketers can seamlessly communicate campaigns, programs, and offers to the field and directly to customers.

By providing answers to the most important questions facing support, sales, and marketing managers, we enable them to make more informed decisions—which can lead to higher customer satisfaction and greater revenue opportunities.

Maximize Profitability

With PeopleSoft Enterprise SmartViews, organizations can create a closed-loop process where issues are identified, strategies are carefully managed, and results are optimized. The results are a more targeted and streamlined approach to Customer Relationship Management (CRM), as well as more effective and profitable customer relationships. Oracle's PeopleSoft Enterprise SmartViews delivers a balanced view of your entire customer base and provide you with the means to evaluate the real-time business performance of CRM initiatives and the ongoing value of your most important asset: your customers.

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