PEOPLESOFT ENTERPRISE STRATEGIC ACCOUNT PLANNING

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PEOPLESOFT ENTERPRISE

BENEFITS

- Align your customer strategy.
- Optimize team and partner collaboration.
- Measure and improve performance.

Oracle's PeopleSoft Enterprise Strategic Account Planning enables your organization to align sales strategy with customer needs and corporate objectives and measure progress against metrics-driven goals. You can segment your customers and consumers and work with partners to identify opportunities in high-potential or underperforming accounts. You can improve execution of the account strategy by triggering recommended actions based on actual versus target goal attainment. With PeopleSoft Strategic Account Planning, you can proactively manage your resources to extract more value from every customer relationship.

Evaluate Customer Value and Needs

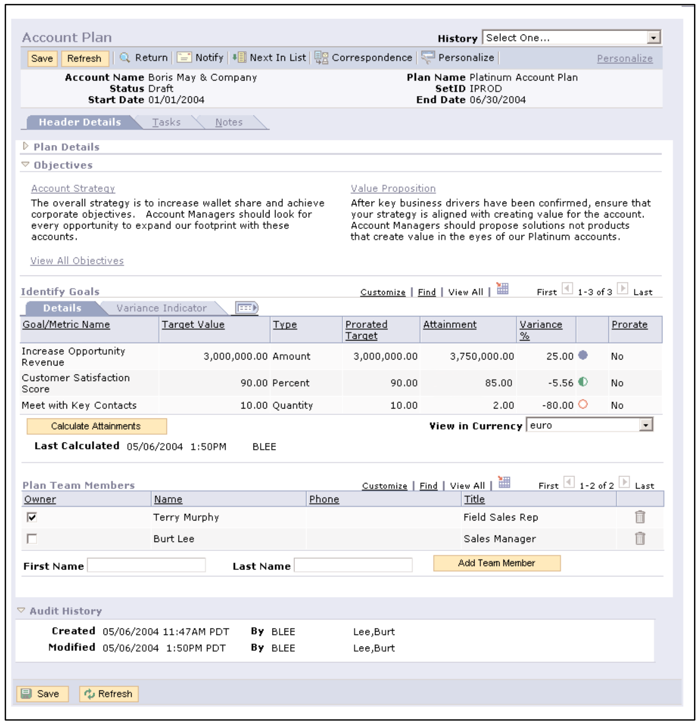
Most companies measure results in terms of products, territories, or employees. They often have limited visibility into which customers are actually driving the most revenue. Few companies can identify which customers are the most profitable to serve.

PeopleSoft Strategic Account Planning helps your organization identify the customers who will bring you the most value and greatest profit. It helps your account team evaluate each customer's current and long-term revenue potential, as well as strategic importance, so that you can invest the right level of resources to serve them profitably.

You can manage your customers at both the company and account manager level. Accounts will typically be grouped into customer portfolios at the company level. Your account managers can further segment their territories based on criteria they define. We can provide a flexible framework to manage your customers based on your unique account coverage strategy.

Global account managers who cover a few major customers can segment them into smaller divisions to identify cross-sell and up-sell opportunities. They also gain a deeper view to control how well the account is being marketed to and serviced.

Account managers who are responsible for a large set of accounts or consumers can segment them into smaller groups based on revenue, profitability, and common characteristics such as industry, geography, or buying requirements. This feature helps account managers focus their time and efforts on the right customers. For example, they can spend time this quarter on the accounts that have current, qualified opportunities while investing in business development initiatives to build pipeline for next quarter.



Strategic Account Plan

By using PeopleSoft Strategic Account Planning, you can plan your customer strategy and align your objectives across the enterprise. Metrics-driven goals enable you to measure and improve performance.

PeopleSoft Strategic Account Planning helps you understand who your customers are. It helps ensure that you can match the right value proposition to meet their needs and ultimately capture more value.

Develop a Measurable Strategy

The account strategy drives your plan for managing the customer lifecycle. It determines how you can capture more value from both high-potential and underperforming accounts. Different customers require different strategies. Each strategy must be based on measurable goals and objectives to help you track the progress your team and partners are making in the account.

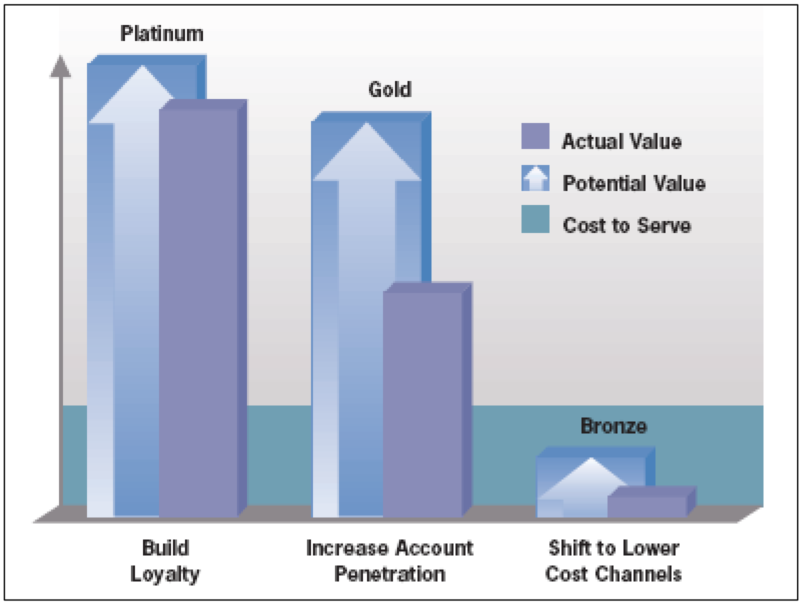
Account managers can use PeopleSoft Strategic Account Planning to:

- Define metrics-driven goals and qualitative objectives for each account.
- Align account goals and compensation with corporate objectives.
- Identify critical success factors for reaching plan targets.
- Outline the value proposition required to meet the customer's specific needs.

PeopleSoft Strategic Account Planning delivers configurable templates out of the box for setting the account strategy. Sales, marketing, and service managers can tailor these plan templates to track unique performance objectives for the account. Each plan template includes suggested goals, or you can quickly create new performance indicators that are specific to your business needs. A task group template specifying a required set of tasks to be performed can also be associated with the plan template.

Metrics can be defined once and deployed across all account plans. Both internal and third-party data sources can be leveraged for metric calculations. For example, you can use market share data to track your competitive position or import survey results to measure customer satisfaction. We give you a robust and extendable framework for measuring account performance.

The PeopleSoft Enterprise SmartView dashboard makes it easy to identify specific issues to address in the account. You can track performance in individual accounts or roll up key metrics to see aggregate performance in a single view. For each metric, account managers can compare actual versus target goal attainment. With PeopleSoft Strategic Account Planning, your executives and account team can quickly adjust the customer strategy in real time.



Invest Resources to Maximize Customer Value

Based on your customer segmentation, you can allocate the right resources to drive profitable revenue growth.

Allocate Resources Based on Customer Value

The next step is to determine how you will allocate limited resources to execute your account strategy. To drive profitable revenue growth, you need to choose the most cost-effective channels while ensuring a seamless experience that optimally meets your customers' needs. For example, to increase your penetration in high potential accounts, you can assign direct, dedicated sales resources to execute high-touch marketing campaigns that offer personalized services. To extract more value from underperforming or unprofitable accounts, you may want to shift to lower cost web and self-service channels for your sales, marketing, and service interactions.

PeopleSoft Strategic Account Planning enables you to match the right resources to market, sell to, and provide service to your customers. Team members are automatically or manually assigned to accounts based on criteria that you define. Territory changes are automatically updated so that your accounts are always assigned to the right account manager. You can also create account plans to leverage partners in capturing more value from key customers. Finally, you can quickly adjust your resource allocation by measuring and monitoring performance against account goals and objectives.

Identify New Opportunities to Increase Customer Value

The most effective account managers do not wait for their customers to voice a need. They understand the key drivers in their customers' businesses and anticipate what challenges their customers will encounter.

PeopleSoft Strategic Account Planning helps account managers proactively manage the key business issues their customers are facing in order to offer the right value proposition. PeopleSoft Strategic Account Planning provides a centralized repository of all account information, delivering a complete, 360-degree view across the enterprise of all the sales, marketing, and service interactions with the customer. This also has prebuilt integration to third-party data sources so that account managers can leverage real-time information to uncover new opportunities to increase customer value. For example, you can track key financial performance measures for each account and view income statements and balance sheets.

This understanding of your customers' needs can help you become a valued consultant that customers trust for advice. You can build customer loyalty and turn every customer interaction into a revenue opportunity. For example, you can recommend new offerings based on the issues identified in a service call. PeopleSoft Strategic Account Planning differentiates you from the competition and positions you to sell more into the account.

Collaborate with Account Team and Partners

To execute the account strategy effectively, your account team and partners need to coordinate their roles and responsibilities. PeopleSoft Strategic Account Planning improves collaboration by clearly identifying key tasks, due dates, and owners to meet the plan objectives. Managers control who can access and edit the account plan.

You can also use the inline analytics to drive plan execution. Based on progress against account goals, the application will trigger alerts and recommended actions. For example, if revenue falls below target, the account manager can be prompted to launch a targeted cross-sell campaign. PeopleSoft Strategic Account Planning enables you to embed planning metrics into active decision points in the application.

Strategic account plans are available at the point of customer interaction—anytime, anywhere. To facilitate sharing, account plans can be generated automatically and printed or emailed to managers, team members, and partners.

The account plan also helps the team identify which relationships they can leverage to influence key decision makers. The account team can view all the contacts associated with the account and track metrics, such as number of meetings with key contacts, to evaluate how well they are executing against the relationship strategy. Oracle's PeopleSoft Enterprise Strategic Account Planning helps you monitor account performance so you can quickly refine your strategy and allocate resources appropriately.

Contact Us

For more information about PeopleSoft Enterprise Strategic Account Planning, please visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.