Oracle BI & EPM Partners – Get Specialized To Find & Win more Business

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Agenda - Why are we here?

To Find and Win more business

To discuss among us:

• How can Oracle help?
  • You to Get the Skills you Need
  • You to do Lead Generation – find more deals

• How can we beat the competition?
  • Get Specialized

• Some updates on Products and Strategy
  • Understand Oracle’s goto market story
  • cross selling EPM + BI
Get Specialised
OPN Specialized

- Elite level for Specialized Partners
- Expertise in multiple Oracle Solutions
- Dedicated support from Oracle Partner Business Center

Platinum

- Resell all Oracle technology products
- Eligible to resell Oracle Applications
- Eligible for Specialization

Gold

Remarketer

- Resell Oracle’s 1-Click products
- Business support from VAD
- No member contract or fees

Announced at Open World: October 2009
## Phase I Specializations – December 2009

### Category | Solution Specialization
--- | ---
**Database** | Oracle Database 11g  
| | Oracle Database 11g Performance Tuning  
| | Database Security  
| **Data Warehousing** | Oracle Real Application Clusters  
| | Oracle Enterprise Manager  
| | Oracle EM Application Quality Management  
| | Oracle Enterprise Linux  
**Middleware** | Service-Oriented Architecture  
| | **Oracle Business Intelligence Foundation**  
| | Application Grid  
**Applications** | Oracle E-Business Suite Financial Management: General Ledger  
| | Oracle E-Business Suite Financial Management: Payables  
| | Oracle E-Business Suite Financial Management: Receivables  
| | Oracle E-Business Suite Supply Chain Management: Inventory  
| | Oracle E-Business Suite Supply Chain Management: Purchasing  
| | Oracle E-Business Suite Supply Chain Management: Order Management  
| | Oracle E-Business Suite Supply Chain Management: Advanced Supply Chain Planning  
| | PeopleSoft Human Capital Management  
| | PeopleSoft PeopleTools  
| | PeopleSoft Financial Management  
| | JD Edwards EnterpriseOne Financial Management  
| | Oracle CRM On Demand  
| **Oracle Hyperion Financial Management**  
| **Oracle Hyperion Planning**  
| **Oracle Hyperion Essbase**  
| **Business Intelligence Applications for ERP**  
| **Business Intelligence Applications for CRM**  
| Primavera P6 Enterprise Project Portfolio Management  
| Oracle Policy Automation

### Industry Concentrations
- Healthcare Payer
- Healthcare Provider
- Retail
- Public Sector
- High Technology
- Accelerate

30 Solution Specializations  
6 Industry Concentrations
Specialization 1 – 2 – 3

1. Join Knowledge Zone
2. Apply
3. Complete Required Criteria
Specialist GLP – Guided Learning Path

Assessment
Specialization Tracker

OPN COMPETENCY CENTER
The Fast Track to OPN Education

Specializations Tracker

Available Specializations

- Application Grid
  - 1:1
  - 100% sales
  - Not applicable implementation
  - Not applicable developer
  - Not applicable support

- Oracle Database
  - 1:2
  - 50% sales
  - 1:1 implementation
  - 0:1 developer
  - Not applicable support

In order to qualify for a Specialization a Partner company must meet two types of criteria: Competency Criteria and Business Criteria. Track your company's staff competencies here.
Specialized Partners are...

Differentiated  Recognized  Preferred

ORACLE PARTNERNETWORK

Specialized. Recognized by Oracle. Preferred by Customers.

Phase 1 Specializations

December 2009
How can we help? – You to Get the Skills you Need

• **How to Sell and Demonstrate Oracle solutions**
  - BIC2G – Demo kits
  - Presentation material
  - Training

• **Implement for Success**
  - Technical training – “Bootcamps” (2 to 5 days)
  - Functional training
  - “Expert” Assistance from OCS – skills transfer, QA, technical help
From Target to Close – BI & EPM Partner Toolbox

Sales Model… Where to find help:

- Co-Selling (Oracle sells Licence)
- Partner Resells Licence
- Joint Partner & Oracle Marketing
- Trusted Business Case
- Trusted Implementation Plan

Flowchart:
- PLANNING & TARGETING
- MARKETING LEAD GENERATION
- PIPELINE: DISCOVERY & QUALIFICATION
- SOLUTION DEVELOPMENT
- SOLUTION PRESENTATION & DEMONSTRATION
- PRICING & RESOLUTION
- CLOSE
- SKILLS ENABLEMENT
- SALES SKILLS ENABLEMENT
- PRODUCT IMPLEMENTATION SKILLS ENABLEMENT
- PARTNER CERTIFICATION
- SUCCESSFUL PROJECT IMPLEMENT = CUSTOMER REFERENCE
To get more clients engaged with you on Oracle BI & EPM projects, we jointly work to help you run your Demand Generation activities:

• **Awareness**
  - EPM TV
  - Oracle.com “Solution Catalog”

• **Interest**
  - Exec Forums – Dinner / Breakfast briefings: Management Excellence
  - BI Symposium series – from Disk to Dashboard
  - “Entry Points” - Starting the conversation with Customers
  - Verticalise the solution

• **Action**
  - Targetted transactional campaigns to agreed segment
  - Target Account Planning jointly with Oracle Sales / “Speed Dating”
  - Packaged initial implementation offers – POC / POS
  - Bi 11g launch campaigns

**How can we help?** – You to do Demand Generation
Example

Find Business – OBI-Apps Surge Campaign

BI-Apps Test Drive Campaign

<<<<< Run by Partner

Oracle Financial Analytics

Oracle Financial Analytics are designed to give organizations insight into the factors underpinning their profitability, performance, revenue and costs. Being pre-built and tightly integrated with Oracle E-Business, they are quick to implement with less risk and cost than traditional BI solutions.

Key Benefits

- Secure, role-based access to accurate and timely financial information helps improve decision making.
- Increase cash flow and working capital through more effective receivables, payables and inventory management.
- Guided navigation helps provide insight to actions e.g.: "what should I do now based on current events".
- 100% web based dashboards and ad-hoc reporting designed for end users.
- Complete pre-built Business Intelligence environment for Oracle E-Business users.
- Less cost, risk and quicker implementation than a traditional "build it yourself" Business Intelligence solution.

Oracle E-Business and BI Applications

Oracle E-Business Suite is the most comprehensive suite of integrated, global business applications helping companies to effectively manage their business. Oracle’s BI Applications are an integrated suite of pre-built business intelligence solutions for E-Business modules designed to ensure that customers can get the best insight into the valuable data held in their E-Business systems.

Being pre-packaged and integrated with Oracle E-Business offers the benefits of rapid deployment, lower Total Cost of Ownership and built-in best practices, whilst also being able to be easily extended to meet specific needs.

Oracle Financial Analytics

Oracle Financial Analytics are one component of Oracle BI Applications covering General Ledger, Accounts Payable and Accounts Receivable. Hundreds of key performance indicators and more than 200 reports enable financial managers to improve cash flow, lower costs, and increase profitability whilst maintaining more accurate, timely, and consistent financial reporting.

- Access cash management and monitor operational effectiveness of the payable department to ensure timely transaction costs
- Monitor Daily Sales Outstanding (DSOs) and cash cycles to manage working capital, manage collections, and control receivables risk
- Manage financial performance across locations, customers, products, and territories, and resolve real-time alerts on events that may impact financial condition
- Identify most profitable customers, products, and channels, and understand profitability drivers across regions, divisions, and profit centers
WIN
More Business
“BI Eco-system”
Differentiate by Adding Value

OBI-Apps: Pre-Built
OBI ERP & CRM
Analytics

Spatial Analytics

OLAP / Essbase

BI-driven Business Process & SOA

Data Mining

Performance Management Applications { Hyperion }

World’s Fastest Database Machine
Exadata Database Machine  Version 2  
made by Sun and Oracle  (Announced Oct. 2009)

- World’s Fastest Database Machine
- Lowest TCO / transaction

http://www.oracle.com/features/exadata.html

{  Much faster / lower cost than  
- Teradata, Netezza, IBM …  }
## Compete by Adding Value

<table>
<thead>
<tr>
<th>OBIEE</th>
<th>Bl-Server Common Enterprise Information Model joins multiple heterogeneous data sources for one source of the Truth.</th>
</tr>
</thead>
<tbody>
<tr>
<td>OBI-Apps</td>
<td>Fastest Value to Customer with Pre-Built ERP &amp; CRM Analytics and Data-warehouse with a single Common Enterprise Information Model and fully conformant dimensions: all upgraded in sync. with the source applications.</td>
</tr>
<tr>
<td>Data Mining</td>
<td>Spatial Analytics (with Oracle Spatial DB Option) is much easier with OBIEE: we have many satisfied customers (Government, Utilities, Telco …) .</td>
</tr>
<tr>
<td>SOA + BI</td>
<td>Bl-driven Business Processes embedded in Applications work flow (like we have in Oracle Fusion Applications) much easier with OBIEE as component of (open) SOA and BPEL. Hyperlink keeping data-context in OBI Dashboards for drill up, down and across, and into Actions.</td>
</tr>
<tr>
<td>OLAP</td>
<td>Essbase is the market leading and original OLAP engine, loved by business users and I.T.</td>
</tr>
<tr>
<td></td>
<td>Hyperion Performance Management Applications are the #1 market leaders: delivering Fast Close and Enterprise scale, agile Planning and Budgeting.</td>
</tr>
</tbody>
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OBIEE Common Enterprise Information Model
Enables Consistency, Security, Reuse, Flexibility

PRESENTATION LAYER
- User Roles, Preferences
- Simplified View
- Logical SQL Interface

SEMANTIC OBJECT LAYER
- Dimensions
- Hierarchies
- Measures
- Calculations
- Aggregation Rules
- Time Series

PHYSICAL LAYER
- Map Physical Data Connections
- Schema

Role-Based Views of the Information Relevant to the User
Consistent Definition of Business Measures, Metrics, Calculations
Model Once, Deploy Everywhere

Federates access Joining all Enterprise Data Sources
Oracle’s BI / Geospatial Platform

- Geographic visualization of BI as “just another interactive chart type”
- Bi-directional map integration
- Visualize and associate multiple measures on map
- “Drill” and “Navigate” dashboards from map

MapViewer ↔ OBIEE

Interactive Mapping
Spatial Analysis
Optimized Spatial Data Management

Business Intelligence
Enterprise Business Information Model
Optimized Data Access
Analytical Capabilities

Oracle Spatial
## Example Spatial Database

<table>
<thead>
<tr>
<th>Category</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mapping Agencies and Cadastres</strong></td>
<td>Ordnance Survey, USGS, NGA, Census Bureau, Australia, NAVTEQ, Tele Atlas, Land Registry Ireland, LR Northern Ireland, LR Scotland, Dutch Cadastre, KMS Denmark, LR Singapore</td>
</tr>
<tr>
<td><strong>Emergency Response</strong></td>
<td>FEMA, State Emergency Management Agencies, BT 999, UK National Flood Protection</td>
</tr>
<tr>
<td><strong>Transportation Infrastructure &amp; Maintenance</strong></td>
<td>Victoria Rail, Austria Rail, Denmark Rail, Dutch Rail, German Rail, Over 35 US State DoTs, Alberta Transportation, 10</td>
</tr>
<tr>
<td><strong>Telecommunication Services</strong></td>
<td>BT, AT&amp;T, Verizon, Nextel, Sprint, Cingular, Over 20 National Telcos</td>
</tr>
<tr>
<td><strong>Utilities</strong></td>
<td>Thames Water, E.On, SNAM, Hydro-Quebec, RWE, Société des Eaux de Marseille, NI Water, Oshawa, Georgia Power, Stadtwerke Augsburg, …</td>
</tr>
<tr>
<td><strong>Central/Local Government</strong></td>
<td>Beijing Doncheng District, New York City, Chicago, Los Angeles, San Jose, Washington DC, Cleveland, Malmo, Gothenburg, Stockholm, Milan………</td>
</tr>
<tr>
<td><strong>Agriculture</strong></td>
<td>Portugal, Spain, Ireland, Poland, Italy, Greece, England, Finland, Czech, Slovakia</td>
</tr>
</tbody>
</table>
Data Mining Provides Better Information, Valuable Insights and Predictions

Segment #1: IF CUST_MLO > 14 AND INCOME < $90K, THEN Prediction = Cell Phone Churner, Confidence = 100%, Support = 8/39

Segment #3: IF CUST_MLO > 7 AND INCOME > $175K, THEN Prediction = Cell Phone Churner, Confidence = 83%, Support = 6/39
Example Oracle Data Mining Use Cases

- **Retail**
  - Customer segmentation
  - Response modeling
  - Recommend next likely product
  - Profile high value customers

- **Banking**
  - Credit scoring
  - Probability of default
  - Customer profitability
  - Customer targeting

- **Insurance**
  - Risk factor identification
  - Claims fraud
  - Policy bundling
  - Employee retention

- **Higher Education**
  - Alumni donations
  - Student acquisition
  - Student retention
  - At-risk student identification

- **Healthcare**
  - Patient procedure recommendation
  - Patient outcome prediction
  - Fraud detection
  - Doctor & nurse note analysis

- **Life Sciences**
  - Drug discovery & interaction
  - Common factors in (un)healthy patients
  - Cancer cell classification
  - Drug safety surveillance

- **Telecommunications**
  - Customer churn
  - Identify cross-sell opportunities
  - Network intrusion detection

- **Public Sector**
  - Taxation fraud & anomalies
  - Crime analysis
  - Pattern recognition in military surveillance

- **Manufacturing**
  - Root cause analysis of defects
  - Warranty analysis
  - Reliability analysis
  - Yield analysis

- **Automotive**
  - Feature bundling for customer segments
  - Supplier quality analysis
  - Problem diagnosis

- **Chemical**
  - New compound discovery
  - Molecule clustering
  - Product yield analysis

- **Utilities**
  - Predict power line / equipment failure
  - Product bundling
  - Consumer fraud detection
In-Database Data Mining
Speeds Time to Value, Lowers TCO

Traditional Analytics

Data Import

Data Mining Model “Scoring”

Data Preparation and Transformation

Data Mining Model Building

Data Prep & Transformation

Data Extraction

Oracle Data Mining

Results

• Faster time for “Data” to “Insights”
• Lower TCO—Eliminates
  • Data Movement
  • Data Duplication
• Maintains Security

Savings

Model “Scoring”
Data remains in the Database

Embedded data preparation

Cutting edge machine learning algorithms inside the SQL kernel of Database

SQL—Most powerful language for data preparation and transformation

Data remains in the Database

SAS ? : Hours, Days or Weeks

Secs. Mins or Hours

Oracle Data Mining

Source Data

SAS

SAS Work Area

SAS Processing

Process Output

Target

SAS

ORACLE
Modeling & Analytics in the BI Continuum

- Standardized Reporting
- Ad-Hoc Query & Reporting
- Operational
- Strategic
- Dynamic
- Essbase for all Lines of Business
- Future Oriented

Future-Oriented

- Modeling
- Advanced Analytics
- Static
Essbase for all Lines of Business

Market Dynamics

• **Characteristics**
  – Existing mature & established business from Hyperion
  – The leading OLAP market product; well established in the Finance lob community
  – Evolving into
    • Natural business component of BI environments, extends into What if Modelling
    • For all analyst users, in all LOBs (not just Finance)

• **Top solution areas**
  – Expand DW reach and user productivity - whether Oracle or non-Oracle DW
  – Complementary to existing BI tools – whether Oracle or non-Oracle BI
  – Extension of new BI tech deals
  – Extension of BI Apps (esp Financial Analytics)

• **Essbase/BI EE linkage**
  – 26% of top deals included both BI EE & Essbase
  – 22% of top 100 BI EE deals included some Essbase
  – 33% of top Essbase deals included some BI EE
Complete Solution, from Disk to Dashboard

- **Performance Management Applications**
- **“Hyperion”**
Market-leading Performance Management Applications Suite

EPM Workspace

PERFORMANCE MANAGEMENT APPLICATIONS

| Strategy Management | Business Planning | Profitability Management | Financial Reporting & Compliance |

BI Applications

Business Intelligence Foundation

Fusion Middleware

OLTP & ODS Systems
Data Warehouse Data Mart
OLAP
SAP, Oracle, Siebel, PeopleSoft, Custom
Excel XML
Business Process

ORACLE
Market-leading Performance Management Applications
Join up Fragmented Management Processes

**Strategic Planning**
- Set Strategic Objectives
- Long-Term Planning
- Corporate Development
- Treasury Strategies

**Planning and Budgeting**
- Cascade Targets
- Detailed Budgeting
- Allocate Resources
- Forecasting

Master Data
Business Rules
Metrics/KPIs
Targets, Plans & Actuals

**Financial Close Process**
- Data Cleansing
- Consolidate
- Internal Reporting & Analysis
- External Reporting & Compliance

**Cost and Profitability Management**
- Define Costing Methods
- Define Cost Drivers
- Perform Allocations
- Report & Analyze
Market-leading Performance Management Applications Suite

• Hyperion Financial Management
  – New Equity Pickup Module
  – Enhanced Intercompany Processing
  – BI Publisher Integration for System Reporting
  – Oracle Data Integrator Support
  – Drill-Through to Oracle EBS

• Hyperion Planning
  – Ad-hoc Analysis in Smart View
  – Document Attachments
  – Oracle Data Integrator Support
  – Drill-Through to Oracle EBS

• Hyperion Strategic Finance (CY2008)
  – Support for Financial Data Quality Mgmt
  – Automated Export to Essbase
  – Integration with Oracle Crystal Ball
BI Apps & Essbase GB Promotion (H2 fy10 - WE)

Applicable to Companies below $500m but above $100m in Revenue
- Reduce User Minimums from Current 25 to 10
- A Maximum Discount to apply of 50% on each transaction (50% to partner if indirect)

ALSO - Applicable to Companies below $100m in Revenue
- Standard SMB discount of 50% on the 10 users (Price List adjustment)
- Standard partner discount will then apply (on top of 50%)

NOTE:
- This approval is applicable only to the Western European GENERAL BUSINESS Market defined as companies below $500m in Annual Revenue.
- This Approval is applicable to the 31st May 2010
- For In-Direct Deals this Approval allows terms to Certified & Advantage Partners only
- Approval is Applicable to All Products on the Business Intelligence Applications Component Price List with the exception of Hyperion Strategic Finance (already at 5 User Minimums); Hyperion Data Integration Management + Options (Already at Computer Metric), Hyperion Data Relationship Management (Based on Records Metric)
- Approval is Applicable to the following Products from Oracle Technology Global Price List 1st October 2009: only Essbase Plus
From Target to Close – BI & EPM Partner Toolbox

Sales Model… Where to find help:

PLANNING & TARGETING

MARKETING LEAD GENERATION

Joint Partner & Oracle Marketing

Co-Selling (Oracle sells Licence)

PipeLine: DISCOVERY & QUALIFICATION

Trusted Business Case

Partner Resells Licence

SOLUTION DEVELOPMENT

SOLUTION PRESENTATION & DEMONSTRATION

Trusted Implementation Plan

PRICEING & RESOLUTION

CLOSE

SKILLS ENABLEMENT

SALES SKILLS ENABLEMENT

PRODUCT IMPLEMENTATION SKILLS ENABLEMENT

PARTNER CERTIFICATION

SUCCESSFUL PROJECT IMPLEMENT = CUSTOMER REFERENCE