



March 2011

Business Process Framework Certification

Rapid Offer Design & Order Delivery (RODOD)



Table of Contents

| | |
|---|-----------|
| Rapid Offer Design & Order Delivery - RODOD | 3 |
| RODOD Solution Overview | 3 |
| Business Process Framework RODOD Scope (High Level) | 5 |
| Business Process Framework RODOD Scope (diagrammatic) | 5 |
| Business Process Framework RODOD Scope (tabular) | 6 |
| Mapping Technique Employed | 6 |
| Manual and Automated Support | 6 |
| Solution Certification Versions | 6 |
| Business Process Framework Alignment (Detailed Scope) | 7 |
| 1.2.1 – Marketing & Offer Management..... | 7 |
| 1.2.1.5 – <i>Product & Offer Development & Retirement (tabular)</i> | 7 |
| 1.1.1 – Customer Relationship Management..... | 21 |
| 1.1.1.2 – <i>Customer Interface Management (tabular)</i> | 21 |
| 1.1.1.4 – <i>Selling (tabular)</i> | 26 |
| 1.1.1.5 – <i>Order Handling (tabular)</i> | 35 |
| 1.1.1.6 – <i>Problem Handling (tabular)</i> | 50 |
| Assessment Notes | 59 |
| Documentation / Asset Inventory | 60 |
| Process Conformance | 62 |

Business Process Framework RODOD Certification

Rapid Offer Design & Order Delivery - RODOD

This document provides details of Oracle's self-assessment and TMF's certification of Oracle's Rapid Offer Design & Order Delivery (RODOD) solution against the Business Process Framework.

RODOD Solution Overview

Most communications service providers' services are growing in terms of complexity and sheer number, and they need to deliver these services through multiple-channels (e.g. customer care, Web, kiosk, sales force, retail store). Whether they are triple-play, quad-play, mobility, or greenfield service providers, they must develop a strong product launch and order management environment to improve the customer experience while managing the operational costs of designing, launching, and delivering complex new products and services.

Only Oracle provides a fully-integrated, product-based rapid offer design and order delivery solution that cost-effectively speeds offer introduction and enables accurate order delivery.

Oracle Communications Rapid Offer Design and Order Delivery solution provides:

- Faster time to market with integrated end-to-end offer design configuration
- Shorter order cycles with complete visibility across the order lifecycle
- Reduced operational cost through advanced order management capabilities and integrations

RODOD is a comprehensive solution consisting of Oracle's Product Hub for Communications, Siebel CRM, Oracle Communications Order and Service Management (OSM), Billing & Revenue Management (BRM), and Application Integration Architecture (AIA) for Communications. Optional products include Oracle UIM & ASAP, Oracle E-Business Suite, Oracle Business Intelligence Enterprise Edition (OBIEE), and the Information Framework (SID) certified Oracle Communications Data Model (OCDM).

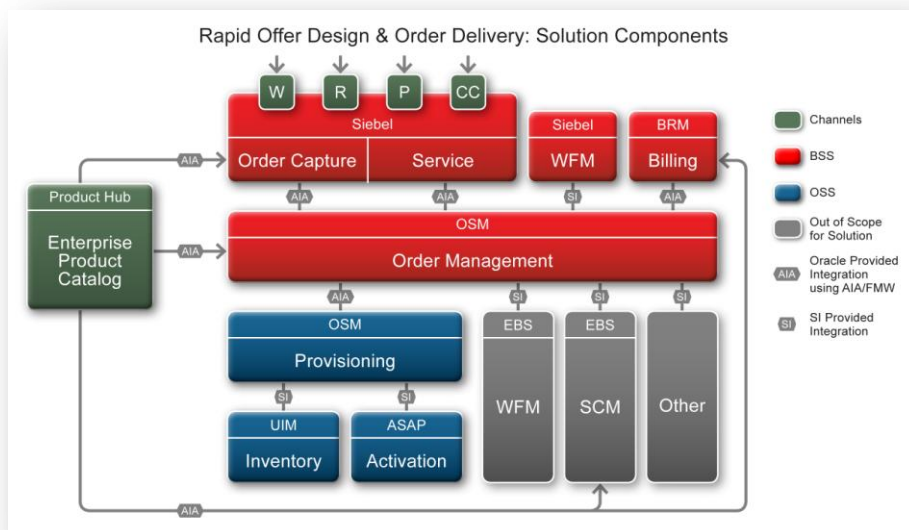


Figure 1 - Rapid Offer Design & Order Delivery: Solution Components

Over a four-year period, Oracle has proactively sought input from over 50 different Service Providers worldwide, via Customer Advisory Boards as well as Special Interest Groups, to understand, identify and prioritise their needs across the Concept to Cash processes. This led to a multi-year cross-applications roadmap and investment program to develop this productised “Rapid Offer Design and Order Delivery” (RODOD) solution.

The solution scope, its key design principles as well as the functional roles and capabilities in support of Concept to Launch, and Order to Cash are described in greater detail in the Rapid Offer Design and Order Delivery Whitepaper, which you can find in our RODOD Virtual Briefing Center (vshow.on24.com/vshow/rodod) or on the TM Forum Web Site (TMForum.org) in the Conformance Certification Assessment Results area for the Oracle RODOD Assessment.

Business Process Framework RODOD Scope (High Level)

Business Process Framework RODOD Scope (diagrammatic)

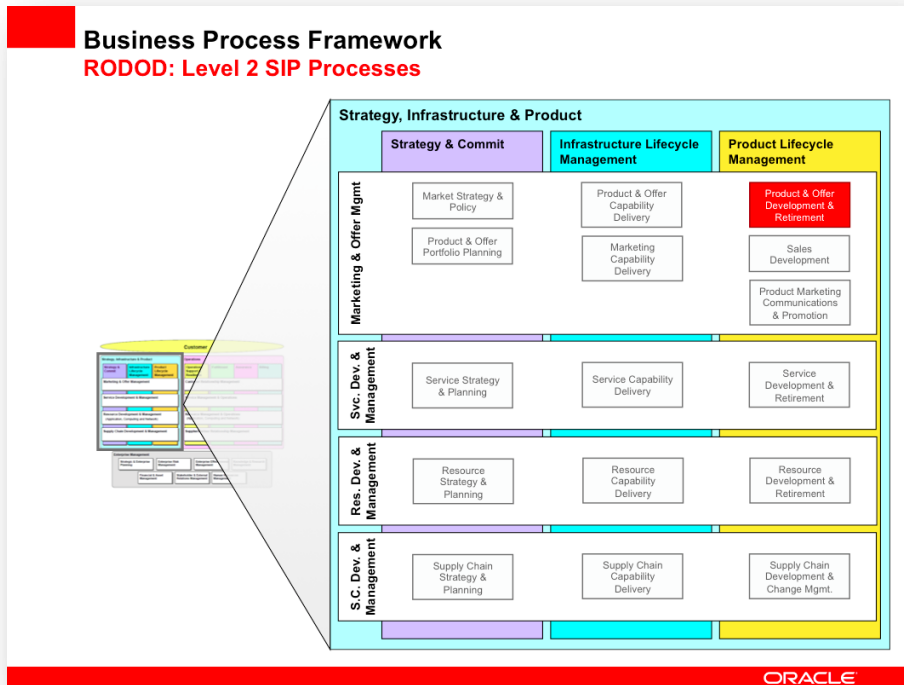


Figure 2 – RODOD: Level 2 SIP Processes

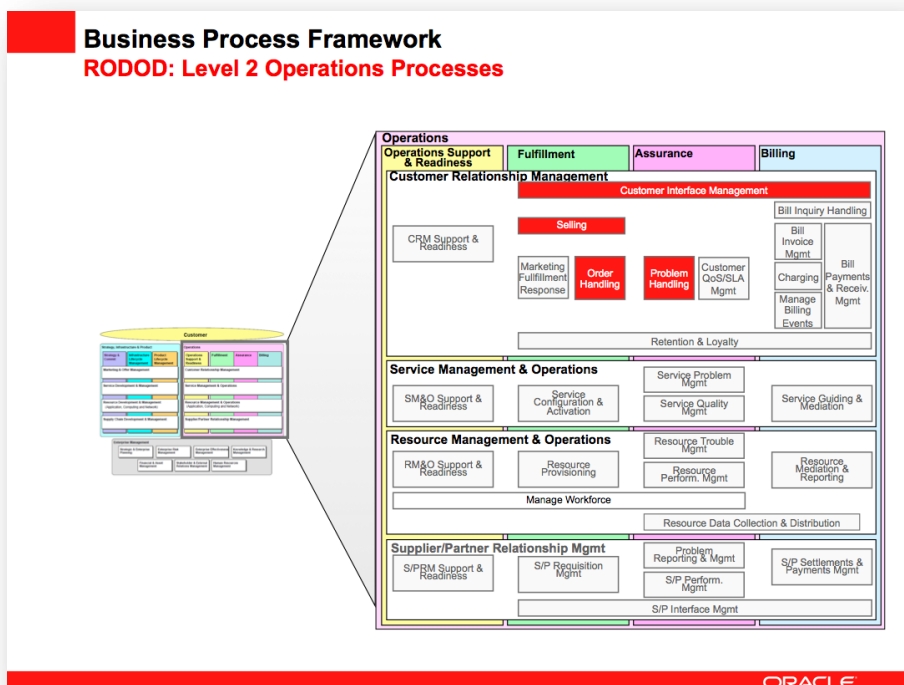


Figure 3 – RODOD: Level 2 Operations Processes

Business Process Framework RODOD Scope (tabular)

| Business Process Framework Level 1 Process Element | Business Process Framework Level 2 Process Element |
|--|--|
| Marketing & Offer Management | Product & Offer Development & Retirement |
| Customer Relationship Management | Customer Interface Management |
| | Selling |
| | Order Handling |
| | Problem Handling |

Mapping Technique Employed

Business Process Framework L3 descriptions are analyzed by looking for implied tasks (this is similar to how process decomposition can use Semantic Analysis). Then each task is mapped to appropriate company documentation to show how the tasks are supported.

A colour coding text high-lighting mechanism is used as part of the process mapping whereby high-lighted text will indicate the level of support for a Level 3 process implied task as follows:

- **GREEN High-lighting** of text is used to high-light key words/ key statements which are fully supported.
- **YELLOW High-lighting** of text is used to high-light key words/key statements which are partially supported.
- **GREY High-lighting** of text is used to high-light key words/key statements which are not supported.
- No High-lighting is used for Words/statements that are Not relevant and it is just for reference or to complete the sentence [No Process mapping is expected for those statement or words].

Manual and Automated Support

It is important to determine whether the implied task is supported by manual steps, automated steps or a combination of both, In this document, "A", "M" or "A/M" are used for each task to indicate that the step or steps is/are automated (A), manual (M), or both (A/M).

Solution Certification Versions

The following table provides the versions of the primary components in the RODOD solution that have been assessed as part of this certification.

| Product | Version |
|---|----------|
| Oracle Product Hub for Communications & E-Business Suite | R12.1.2 |
| Oracle Siebel CRM for Communications | 8.1.1.4 |
| Oracle Communications Order & Service Management (OSM) | 7.0.2 |
| Oracle Communications Billing & Revenue Management (BRM) | 7.4 |
| Oracle Application Integration Architecture for Communications <ul style="list-style-type: none"> • Product MDM Process Integration Pack • Order to Activate Process Integration Pack • Order to Bill Process Integration Pack | 2.5 IPS2 |
| Oracle Communications Data Model (OCDM) | 11.2.3 |

Business Process Framework Alignment (Detailed Scope)

1.2.1 – Marketing & Offer Management

1.2.1.5 – Product & Offer Development & Retirement (tabular)

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|---|
| 1.2.1.5 Product & Offer Development & Retirement | Alignment | Mapping Comment |
| <p>1.2.1.5.2 Assess Performance of Existing Products</p> | <p>OBIEE Metrics: (A)</p> <ul style="list-style-type: none"> • Sales Products: Page 272 to 274 • Svc Requests: Page 306 to 309 <p>Sales Analytics Product Guide: (A/M)</p> <ul style="list-style-type: none"> • Page 73 • Page 74 • Page 75 • Page 76 • Page 77 • Page 78 • Page 79 <p>Service Analytics Product Guide: (A/M)</p> <ul style="list-style-type: none"> • Page 61 • Page 77 • Page 78 • Page 79 • Page 80 • Page 81 <p>E15886-03: (A/M)</p> | <p>Brief Description Analyze the performance of existing products to identify inadequacies and required improvements</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The Assess Performance of Existing Products processes analyze the performance of existing products to identify inadequacies and required improvements. These processes use information from customers and from operational activities to identify required improvements.</p> <p><i>Comprehensive sales and service metrics, pre-integrated through ETL's from the Siebel CRM system, provide the necessary insight to assess the performance of products from a sales, service (cost to serve), and customer feedback perspective.</i></p> <p><i>Specific examples of reports that can be used by an end-user to assess the performance of products from a sales, service and customer perspective include:</i></p> <p><i>Sales:</i></p> <ul style="list-style-type: none"> • Avg. Order Discount & Margin by Product Line • Avg. Order Selling Price by Product Line • Avg. Line Item Order Size by Product Line • Avg. Sales Cycle by Product Line • Win Rate by Product Line • Reason Won by Product Line • Reason Lost by Product Line <p><i>Service:</i></p> <ul style="list-style-type: none"> • Customer Satisfaction by Product Line • Top 10 Serviced Products • Top 10 Product Lines with Open-Critical SRs • Open-Critical SRs by Product Line • Service Requests by Product Line • Resolution Time <p><i>In addition to the Siebel pre-built analytics, the Oracle Communications Data Model (OCDM) offers a</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|---|
| | <ul style="list-style-type: none"> • OLAP Cubes: 9-1 to 9-143 • Sample Reports: 12-1 to 12-68 | <p><i>SID certified Intelligent Data Warehouse package that is tightly integrated with the business intelligence platform. With pre-built data mining, Oracle Online Analytical Processing (Oracle OLAP) and dimensional models, Oracle Communications Data Model provides you with industry-specific metrics and insights that you can use to perform detailed analysis around all aspects of product viability. Assets that would be particularly useful for analysing a products performance in OCDM include: Customer Acquisition Cube (p9-81), Revenue Cube (p9-110), Subscriber Churn Statistic Cube (p9-122), Product Management Sample Reports (p12-50).</i></p> |
| <p>1.2.1.5.4 Develop Product Commercialization Strategy</p> | <p>B31989-01: (A/M)</p> <ul style="list-style-type: none"> • Page 3-26 to 3-27 <p>B31989-01: (A/M)</p> <ul style="list-style-type: none"> • Page 3-28 to 3-31 | <p>Brief Description Ensure that product specific pricing, sales channel support and regulatory approvals are identified and agreed</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The Develop Product Commercialization Strategy processes ensure that product specific pricing, sales channel support and regulatory approvals are identified and agreed. These processes ensure that all commercialization aspects of the product development process associated with selling the product to the market, including pricing, rating, identification of sales support and sales channels features, are developed and agreed.</p> <p><i>The Product Lifecycle Management capabilities are used to systematically drive the Product Commercialization Strategy process. An item lifecycle can be defined by an administrator to mirror the required Product Commercialization Strategy process, expressed as a series of phases, each phase represents a set of tasks and deliverables that are required before promoting the item to the next phase. For example, the lifecycle phases for a new products commercialization might be: Seek Regulatory Approval, Define Merchandising Strategy (e.g. pricing, rating, channels & features), Define Sales Support, Final Approval, and Release to Development.</i></p> <p><i>Administrators create lifecycles to manage the lifecycle phases of items and item revisions. For example, a Product Manager will develop a specific lifecycle to support the Product Commercialisation Strategy process while having another lifecycle to manage the Product Development/Specification process.</i></p> <p>Additionally these processes manage the</p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|---|--|---|
| | <p>B31989-01: (A/M)</p> <ul style="list-style-type: none"> Page 11-1 to 11-3 | <p>enterprise cross-product pricing approval processes.</p> <p><i>Role based security and change management approval routings can be used to support the enterprise cross-product pricing approval processes, where one or all people in a group must approve pricing changes or recommendations, or all people in a group should be notified of a change. Role-based data security is provided, enabling users to secure individual data elements. Every item is secured using role-based data security. Your ability to view, edit and perform certain actions on an item is determined by your role on it.</i></p> <p><i>To summarise, through leveraging the Product Lifecycle Management, Role Based Security, Change Management and workflows, the process of managing the product commercialisation strategy can be tightly controlled and automated across the organisation and also include 3rd parties such as partners and suppliers.</i></p> |
| <p>1.2.1.5.5 Develop Detailed Product Specifications</p> | <p>OPH for Comms Whitepaper:</p> <ul style="list-style-type: none"> Page 5 <p>(Available to customers & partners at support.oracle.com)</p> <p>B31989-01: (M)</p> <ul style="list-style-type: none"> 3-1 | <p>Brief Description</p> <p>Develop and document the detailed product-related technical, performance and operational specifications, and customer manuals.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p><i>Within the Oracle RODOD solution the Product Hub for Communications is used as an enterprise data management solution that enables customers to centralize and master all product information from heterogeneous systems, creating a single view of product information that can be leveraged across all functional departments. The Oracle Product Hub for Communications release is focused on the Communications industry, and the referenced whitepaper has been provided as background to the verticalisation provided in this release.</i></p> <p>Extended Description</p> <p>The Develop Detailed Product Specifications processes develop and document the detailed product-related technical, performance and operational specifications, and customer manuals.</p> <p><i>Oracle's Product Hub for Communications is the primary application that an end-user will use to develop detailed product specifications. Oracle enables you to define hierarchical taxonomies of products, components, and items within the Item Catalog. The Item Catalog contains all the items in the system.</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|---|
| | <p>B31989-01: (M)</p> <ul style="list-style-type: none"> • 3-3 to 3-4 | <p><i>The definition of product specifications start with an 'Item Catalog Category' or 'ICC'. ICC's can be thought of as 'Product Classes', and these provide metadata common to all items that share the category. ICC's are hierarchically structured, with characteristics (attribute groups, attributes, value sets, functions, pages, lifecycles, criteria templates, and result formats) being inherited throughout the hierarchy.</i></p> |
| | <p>E13108-08: (M)</p> <ul style="list-style-type: none"> • 4-31 | <p><i>Oracle provides a pre-seeded metadata library that contains attribute groups, attributes, and value sets specifically designed to support the definition of detailed product specifications for the Communications industry. For reference you can view the complete pre-seeded attribute library that comes with the product in Section F of the Product Hub Implementation Guide.</i></p> |
| | <p>E13108-08: (M)</p> <ul style="list-style-type: none"> • 4-17 to 4-19 | <p><i>If a CSP needs to create new attributes and attribute groups to support the detailed product specification process then an administrator can do so and associate these to the appropriate ICC's. Attributes and attribute groups can be defined for capturing any type of product related data covering all aspects of technical, performance and operational specifications.</i></p> |
| | <p>B31989-01: (M)</p> <ul style="list-style-type: none"> • Page 3-4 to 3-5 | <p><i>Value-sets are used to ensure that as attributes are captured against item definitions by an end-user, validation can be automatically performed. Attributes can have a static or dynamic list of valid values, or a range of values. For each user-defined attribute, you can optionally specify a value set with data type and validation rules to be applied when the user inputs data. Once created, value sets can be reused for different attributes.</i></p> |
| | <p>B31989-01: (M)</p> <ul style="list-style-type: none"> • Page 8-1 to 8-3 | <p><i>Product Hub also provides specific functionality to support the management of documents as part of this process, for example the development of customer manuals, technical documentation, data-sheets, etc. Document Management and Collaboration (DOM) enables the storing, organizing, and sharing of product information, including unstructured data such as files, internet links, and images. DOM uses a content repository to store files and it uses Change Management to control changes to documents and files.</i></p> <p><i>To summarise, using the basic building blocks described above; the Item Catalog, Item Catalogue Categories, Attribute Groups, Attributes and Value-sets the Product Hub allows the end-user to document detailed product-related specifications in a structured way. Many of the industry specific attributes that are required to be captured during product specification are provided as standard</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|--|
| | <p>B31989-01: (A/M) <ul style="list-style-type: none"> • Page 3-26 to 3-27 </p> <p>B31989-01: (A/M) <ul style="list-style-type: none"> • Page 3-28 to 3-31 </p> | <p><i>through a pre-seeded metadata library, but the tool provides a flexible framework to extend these attributes as required by a CSP. DOM can be used to collaborate on the creation of product related documentation leveraging Change Management to control changes to documents and files.</i></p> <p><i>Below we will describe how the Product Hub and Product Lifecycle Management will help the end-user to define the detailed product specifications using the basic building blocks described above.</i></p> <p>These processes develop and document the required product features, the specific service and resource requirements and selections, the specific performance and operational requirements and support activities, any product specific data required for the systems and network infrastructure. The processes ensure that all detailed specifications are produced and appropriately documented.</p> <p><i>To ensure that all the required detailed product specifications are produced and documented, Product Lifecycle Management features are used to systematically drive this process. An item lifecycle is defined by an administrator as a series of phases, each phase represents a set of tasks and deliverables that are required before promoting the item to the next phase. For example, the lifecycle phases for a new promotion lifecycle might be: Concept, Design, Trial, Pre-Production, Production, and Retirement.</i></p> <p><i>Administrators create lifecycles to manage the lifecycle phases of items and item revisions. For example, you may have one lifecycle at the item level to manage new product introductions while having another lifecycle to manage the product revision process. Associating a lifecycle with an item catalog category (ICC) makes the lifecycle available for all items in the ICC. Lifecycles are inherited throughout the item catalog category hierarchy. For each lifecycle associated with an ICC, a Change Policy can be defined to specify for each lifecycle phase of the item whether a change is allowed or not allowed or is possible only through a change order. Administrators can define and update item change policies for item catalog categories. These item change policies determine the rules for how and when an item's attributes, attachments, and associations are changed. For example, a CSP launching a brand new service that has hundreds of specifications may wish to define item change policies for the different phases of the product launch. So when the service is in the concept or design phase, many of the attributes are allowed to change without formal approval, and the lifecycle</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|--|
| | <p>B31989-01: (A/M)</p> <ul style="list-style-type: none"> • Page 11-1 to 11-3 <p>B31989-01: (A/M)</p> <ul style="list-style-type: none"> • Page 3-31 to 3-33 <p>B31990-04: (M)</p> <ul style="list-style-type: none"> • 1-2 • 8-10 to 8-15 • 10-11 to 10-19 • 14-42 to 14-47 | <p><i>policy is not very restrictive. When the service progresses to the 'Trial' phase, the CSP might wish to place all attributes, attachments, and associations under stricter change control, perhaps requiring a change order for all modifications. Later, when the service is launched to the market and in the 'Production' phase, the CSP will likely want every facet of the service specification under tight control.</i></p> <p><i>Role based security is also used which is particularly useful in change management approval routings, where one or all people in a group must approve a change, or all people in a group should be notified of a change. Role-based data security is provided, enabling users to secure individual data elements. Every item is secured using role-based data security. Your ability to view, edit and perform certain actions on an item is determined by your role on it.</i></p> <p><i>New Item request is a workflow process, which allows you to route the definition and approval of a new item. When creating a new item, various aspects of an item like base attributes, user-defined attributes, etc. could be defined by various people in the organization using a workflow process. The definition routing and approval routing could be combined in a new item request workflow.</i></p> <p><i>To summarise, through leveraging the Product Lifecycle Management, Role Based Security, Change Management and New Item Request framework and workflows, the process of producing detailed product specifications can be tightly controlled and automated across the organisation and also include 3rd parties such as partners, suppliers and customers. Product Hub for Communications provides the framework for managing the product specification process and co-ordinating activities across the primary actors participating in the process (e.g. Product Managers across different domains; commercial, technical, operations, etc.).</i></p> <p><i>Each individual participating in the Product Specification process will use the UI's provided by Product Hub to define the required product specifications, and workflow, approvals and security will help to systematically drive this process. References have been provided from the user guide on how an end user would perform some of the key tasks when defining a product specification:</i></p> <ul style="list-style-type: none"> • <i>Creating New ICC's</i> • <i>Creating New Items</i> • <i>Creating Change Requests</i> • <i>Creating Documents</i> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|---|
| | <p>E13109-07: (A)</p> <ul style="list-style-type: none"> • 7-1 to 7-26 | <p><i>To summarise, Product Hub for Communications combined with the Product Lifecycle Management & Change Management capabilities facilitates the process of automating and guiding the process of developing detailed product specifications, ensuring that all specifications are produced appropriately based on the CSPs requirements.</i></p> <p>Additionally the processes ensure that the documentation is captured in an appropriate enterprise repository.</p> <p><i>All structured product data is stored within the Product Hub's database which acts as the single master product record. Oracle advocates the use of DOM (as described above) and a Content Management repository for the management and storing all unstructured data (e.g. documents, user manuals, project plans, etc.) relating to products and services. Oracle supports the WebDAV standard to enable users to collaboratively manage files, and provides pre-integration to WebDAV CMS's such as the Oracle ContentDB or Oracle's Unified Content Management (UCM).</i></p> <p><i>This section explains how Product Hub uses the attachments feature to associate unstructured data (files, folders, URLs, etc.) with attributed products and services via a Content Management repository.</i></p> |
| <p>1.2.1.5.6 Manage Product Development</p> | <p>E13623-05: (A/M)</p> <ul style="list-style-type: none"> • 1-1 to 1-2 | <p>Brief Description</p> <p>Ensure the co-coordinated delivery in line with the approved business case of all required product capabilities for that business case across the enterprise</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description</p> <p>The Manage Product Development processes ensure the co-coordinated delivery in line with the approved business case of all required product capabilities for that business case across the enterprise.</p> <p><i>In some cases the management of the Product Development process may be adequately supported through the Product Lifecycle Management capabilities described as part of the 'Develop Detailed Product Specifications' above. For more complex Product Development initiatives Oracle advocates the use of Oracle Project Management to maintain control & visibility of all aspects of a Product Development project. Oracle Projects is part of the same family of products as Product Hub for Communications and Product Lifecycle</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|--|
| | <p>E13623-05: (A/M)</p> <ul style="list-style-type: none"> • 1-3 to 1-4 <p>E13623-05: (A/M)</p> <ul style="list-style-type: none"> • 2-1 to 2-3 <p>E13623-05: (A/M)</p> <ul style="list-style-type: none"> • 2-39 to 2-41 | <p><i>Management, it is fully integrated but can be deployed as an optional component of the core RODOD stack based on a CSPs requirements.</i></p> <p><i>To ensure the co-ordinated delivery with the approved business case for a Product Development, a project manager can plan and monitor project information enabling them to track and manage a project through the project lifecycle, from creating and planning, through to completion.</i></p> <p><i>Budgeting and forecasting is supported allowing a project manager to create budgets and forecasts to manage the financial performance of a project throughout the project lifecycle aligned to the approved business case. The project manager has the flexibility to create multiple budgets and forecasts for a project to demonstrate different scenarios. The PM can track project status and performance by comparing project budget and forecast amounts to actual amounts using Project Performance Reporting and Project Status Inquiry features.</i></p> <p>These processes use project management disciplines to deliver the necessary capabilities, including process development, specific systems & network infrastructure developments, specific channel developments, specific operational procedures, etc. required to support the new product</p> <p><i>A project manager has the ability to define workplans for a project, which is a hierarchical grouping of tasks within a project. The PM can manually define a unique workplan for each of their projects, or alternatively to accelerate the process use pre-defined templates (maybe based on a previous project that had successfully developed a similar product). A PM can create tasks, or copy tasks from other projects and templates to save additional time. Workplans will drive the activities undertaken and completed by the project team and provide visibility of the progress of the project.</i></p> <p><i>Individual projects and workplans can be created by the PM to cover different aspects of a complete program of work, for example as specified in the Business Process Framework text, a PM may define individual workplans for process development, systems infrastructure, network infrastructure, channel development, etc. each required to support the ultimate launch of the new product.</i></p> <p><i>Progress is used to collect and report on the progress of workplans to help assess if execution is on track from both a task completion and financial perspective. These completion targets should be</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|---|
| | <p data-bbox="507 324 724 387">E13623-05: (A/M) • 3-1 to 3-2</p> <p data-bbox="507 1261 735 1323">B31989-01: (A/M) • Page 3-28 to 3-29</p> | <p data-bbox="767 259 1166 291"><i>aligned to the agreed business case.</i></p> <p data-bbox="767 324 1345 539"><i>In order to bring together potentially multiple workplans and projects, Program Management allows a collection of projects to be linked in a hierarchical fashion. The Oracle Projects program management functionality enables a PM to create a program by linking multiple projects to form a program hierarchy.</i></p> <p data-bbox="767 573 1361 853"><i>Programs enable PM's to view and manage workplan and financial information for a group of projects. You can track and report on rolled-up planned, actual, and forecasted effort, cost, and revenue, as well as progress and schedule information for all projects in the program hierarchy. Therefore, as a program manager, you have a strategic focus on the overall program, rather than a tactical project-centric focus.</i></p> <p data-bbox="767 887 1294 1039">It is predominantly a program/project management function, with the detailed management of individual capability delivery managed through separate processes in other horizontal process groupings.</p> <p data-bbox="767 1072 1366 1225"><i><u>See Note 2:</u> The program and project management of a product launch is closely related to process of developing the detailed product specification; certainly this will be one 'process-grouping' of the overall product launch program.</i></p> <p data-bbox="767 1258 1337 1538"><i>To help connect the 'Product Specification' & 'Manage Product Development' processes Oracle Projects can be linked to Oracle Product Lifecycle Management. CSPs can create their own lifecycle phases for product introductions, once the lifecycle phases have been defined, you create a lifecycle in Oracle Projects that controls how, when and by whom new products can be defined and attributed within the Product Hub.</i></p> <p data-bbox="767 1572 1361 1787">Note that delivery of products within the context of existing commercial arrangements is managed through the Supply Chain Development and Change Management process. If new suppliers/partners are required, the Supply Chain Capability Delivery process is used to deliver the necessary commercial arrangements.</p> <p data-bbox="767 1821 1294 1912"><i><u>See Note 3:</u> The Supply Chain Development and Change Management process is not part of this initial certification.</i></p> <p data-bbox="767 1946 1334 2036">Note that the management of major new or enhanced infrastructure development to support Product & Offer Development is managed within</p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|--|
| | <p>E17549-01: (A/M) <ul style="list-style-type: none"> • Page 14 - 17 </p> <p>E17427-01: (A/M) <ul style="list-style-type: none"> • Page 31 - 35 </p> <p>Siebel Marketing</p> | <p><i>all ICC data related to the product launch in Product Hub to Siebel CRM using the publication-framework user interface and the out-of-the-box AIA-based integration.</i></p> <p><i>In Product Hub once your ICC's and associated meta-data is defined Product Manager's will define and attribute the details of the new products and services being launched. This will be done in the 'Develop Detailed Product Specifications' process by creating items, BOMs, attribute values, value overrides, exclusion rules, compatibility rules, billing products, billing discounts, etc. This is the core product data that will be required by operations and the operational systems such as CRM, Billing, and ERP when products are launched. Again, Oracle provides out-of-the-box integration from Product Hub to CRM, Billing and ERP to automatically publish this product data as part of the product launch process. The Product Administrator uses the same publication-framework UI to select the products he/she wishes to publish/launch, and which target systems the product data should be published to.</i></p> <p><i>As part of the product launch process the product classes (ICC's) and all associated metadata such as attributes, value-sets pushed to Siebel from Product Hub also needs to be used within the Service Fulfillment domain to drive the order fulfillment process. This documentation explains how the product to service mapping specialist in OSM will query/import the product class and the associated transaction attributes from Siebel into a cartridge using the OSM design-time environment. The product to service mapping specialist will map the product class to a product specification in the cartridge. The product specification is used to associate decomposition rules, fulfillment functions and their dependencies. Once all the design time setup is completed the cartridge is deployed as part of the product launch process to support the run-time fulfillment of customer orders.</i></p> <p><i>In summary, the focus of this process is to take the detailed product specifications developed in '1.2.1.5.5 Develop Detailed Product Specifications' and ensure that these are synchronised to the various operational systems such as Siebel CRM, Billing & Revenue Management, and Order & Service Management as part of the Product Launch process.</i></p> <p>The initial introduction could be through commercial pilots or market trials, in which case the commercial negotiations for the pilot and/or trial are managed through these processes.</p> <p><i>Siebel Marketing can be used to define and execute</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|---|
| | <p>User Guide: (A/M)</p> <ul style="list-style-type: none"> • Page 13 - 16 • Page 17 - 19 • (M) <p>E17549-01: (A/M)</p> <ul style="list-style-type: none"> • Page 65 – 67 <p>E17427-01: (A/M)</p> <ul style="list-style-type: none"> • Page 31 – 35 | <p><i>stand-alone marketing campaigns to trial the launch of new products / promotions. Segmentation and eligibility rules can be used to identify control groups for the product trial, and promotional pricing defined across the groups to test market acceptance.</i></p> <p><i>The actual commercial negotiations for any pilot and/or trial product launch are typically manual processes supported & managed through the Planning & Budgeting capabilities provided as part of the Siebel Marketing solution. The Marketing Planning module can be applied to fit any organizational planning approach, including plans based on funding, budgets, time periods, business units, product lines, etc.</i></p> <p>These processes identify the shortcomings or issues, and manage the necessary improvements to the product to allow full rollout.</p> <p><i>As the results of the trials are analysed, appropriate adjustments to the products and services being launched can be manually made by a Product Manager through the Product Hub to fine tune the proposition that will be finally launched.</i></p> <p>At the conclusion of the pilots and/or trials when the product passes its acceptance tests or defined acceptance criteria, these processes manage the handover to operations.</p> <p><i>Once the products and services have been finalised based on the results of the trial, and are ready to be launched – the final revision of the products and services need to be pushed to the downstream operational systems. As mentioned above, the Oracle Product MDM PIP publishes the final product definitions to downstream systems such as Siebel CRM, Billing & Revenue Management (BRM) & E-Business Suite (EBS), and any updates to the product classes (less frequent) can be pulled into Order & Service Management (OSM).</i></p> <p>Once accepted as a stable product offering, rollout and/or expanded of the product to subsequent customers is managed by the Operations Support & Readiness processes.</p> <p><i>See Note 2: Here we are describing the process up until the point where products are published to the operational systems and handed over to the Operations Support & Readiness processes.</i></p> |
| 1.2.1.5.8 Manage Product Exit | | <p>Brief Description</p> <p>Identify existing products which are unviable and manage the processes to exit the product from the</p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|---|
| | <p>OBIEE Metrics: (A/M)</p> <ul style="list-style-type: none"> • Sales Products: Page 272 to 274 • Svc Requests: Page 306 to 309 <p>E15886-03: (A/M)</p> <ul style="list-style-type: none"> • OLAP Cubes: 9-1 to 9-143 • Sample Reports: 12-1 to 12-68 <p>Siebel Marketing User Guide: (A/M)</p> <ul style="list-style-type: none"> • Page 13 - 16 | <p>market.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description</p> <p>The Manage Product Exit processes identify existing products which are unviable and manage the process to exit the product from the market.</p> <p>The processes analyze existing products & sales offers to identify economically or strategically unviable products, identify customers impacted by any exit</p> <p><i>Comprehensive sales and service metrics, pre-integrated through ETL's from the Siebel CRM system, provide the necessary insight to assess the viability of products from both a sales and service (cost to serve) perspective.</i></p> <p><i>In additional to the Siebel pre-built analytics, the Oracle Communications Data Model (OCDM) offers a SID certified Intelligent Data Warehouse package that is tightly integrated with the business intelligence platform. With pre-built data mining, Oracle Online Analytical Processing (Oracle OLAP) and dimensional models, Oracle Communications Data Model provides you with industry-specific metrics and insights that you can use to perform detailed analysis around all aspects of product viability. Assets that would be particularly useful for analysing a products viability in OCDM include: Customer Acquisition Cube (p9-81), Revenue Cube (p9-110), Subscriber Churn Statistic Cube (p9-122), Product Management Sample Reports (p12-50).</i></p> <p><i>These Business Intelligence tools allow end users to manually review and analyse the Business Intelligence data provided to assess the viability of products and services offered and the potential impact on the subscriber base.</i></p> <p>develop customer specific or market segment exit or migration strategies,</p> <p><i>Siebel Marketing can be used to define and execute multi-wave marketing campaigns to target customers who will be impacted by the planned product exit. Typically the campaign will be manually configured by a Marketing Manager based on the Business Intelligence data (see above), to target the identified impacted customer segments with promotional offers to incentivise them to move to an alternative viable product.</i></p> <p>develop infrastructure transition and/or</p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|---|
| | <p>E17549-01: (A/M) <ul style="list-style-type: none"> • Page 65 – 67 </p> <p>E17427-01: (A/M) <ul style="list-style-type: none"> • Page 31 – 35 </p> | <p>replacement strategies, and manage the operational aspects of the exit process.</p> <p><i>From a systems perspective a similar approach is taken when retiring products as to when introducing or launching new products. Once a given product or service has been determined as ready for retirement (through the Business Intelligence data provided, or otherwise), the Product Manager can manually specify an end-date for the product exit within the central Product Hub and mark the product(s) as inactive. Through the pre-integration provided to the downstream operational systems these status updates can be automatically published from the Product Hub. By applying these changes to products that have gone into retirement, they will automatically be masked from any commercial catalogue, ensuring the service can no longer be sold into the customer base.</i></p> <p>A business proposal identifying the competitive threats, risks and costs may be required as part of developing the exit strategy. It includes any cross-enterprise co-ordination and management functions to ensure that the needs of all stakeholders are identified and managed.</p> <p><i><u>See Note 1</u>: This proposal could be an input, and/or further developed by management throughout the execution of this process.</i></p> |

1.1.1 – Customer Relationship Management

1.1.1.2 – Customer Interface Management (tabular)

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|--|
| 1.1.1.2 Customer Interface Management | Alignment | Mapping Comment |
| 1.1.1.2.1 Manage Contact | <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Contacts in Siebel: Page 79 to 82 | <p>Brief Description Manage all contacts/requests between potential or existing customers and the enterprise</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The purpose of this process is to manage all contacts between potential or existing customers and the enterprise. It deals with the identification of the contact, its development, enhancement and update.</p> <p><i>Siebel CRM is the central system used for managing all customer and prospect contact across the RODOD solution irrespective of channel. Siebel acts as the central engine that supports the management of customer, prospect & partner contacts, and provides appropriate interfaces to enable this to be supported across multiple channels; contact-centre, CTI, email, web self-service, chat, web-services, etc. (see Manage Request) below.</i></p> <p><i>Within Siebel a Contact is someone about whom the CSP needs to keep business or personal information. Siebel Communications helps you manage contacts and associate contact data with accounts, leads, opportunities, trouble tickets, or service requests. CSR's, Field Service Representatives, Sales Representatives, Marketing Agents are all examples of end users who might use contact management functions. End users can use Siebel Communications to manage and develop the contact as required, including:</i></p> <ul style="list-style-type: none"> • <i>Identify contacts (e.g. through CTI/CLI, searching or via a unique identifier) – Automated through the Siebel Communications Server (see below)</i> • <i>Record and track business and personal contact information - Manual</i> • <i>Create and track a list of activities for a contact – Manual and semi-automated through Activity Lists</i> • <i>Create/View/Modify a contact profile - Manual</i> • <i>Create/View/Modify information about trouble tickets and service requests that are associated with a contact - Manual</i> • <i>Create a Lead or Opportunity against a contact - Manual</i> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|---|--|--|
| | | <ul style="list-style-type: none"> Send correspondence to a contact – Automated through the Siebel Communications Server (see below) |
| <p>1.1.1.2.2 Manage Request (Including Self Service)</p> | <p>Siebel Communications Admin Guide: (A/M)</p> <ul style="list-style-type: none"> Siebel Communications Server: Page 17 <ul style="list-style-type: none"> Using the Communications Toolbar: Page 295 to 297 Using the Communications | <p>Brief Description Manage all requests (inbound and outbound) made by potential and existing customers</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The purpose of this process is to manage all requests (inbound and outbound) made by potential and existing customers. It receives the request and either enables its originator to automatically fulfill it, or identifies and activates the opportune process to accomplish the request; it manages the status of the request and is able to provide status information at any moment in which the request is active; it formally closes the request when all related activities have been terminated.</p> <p><i>The Siebel Communications Server provides an infrastructure to support several kinds of inbound & outbound communications activities for Siebel application users.</i></p> <ul style="list-style-type: none"> Session-based or interactive communications to make and receive voice calls through CTI. Inbound communications, supporting the processing of inbound email when used in conjunction with Siebel Email Response. Outbound communications, supporting the sending of outbound communications such as: <ul style="list-style-type: none"> Send Email, Send Fax, and Send Wireless Message commands for Siebel application users. Sending email replies, for Siebel Email Response. Sending communications content (e.g. template content including data from within the CRM system – e.g. order/trouble-ticket status information) to designated recipients using outbound communication requests. <p><i>An end-user (typically a customer support representative) will use the Siebel Communications Toolbar to initiate outbound communications with customers (make call, send email, send fax, send wireless message, send page) or accept incoming communications (accept call, accept email).</i></p> <p><i>Using the communications toolbar, agents can initiate outbound work items and accept inbound</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|---|
| | <p>Toolbar: Page 297 to 301</p> <p>Siebel Chat Guide: (A/M)</p> <ul style="list-style-type: none"> • About Siebel Chat: Page 9 • Siebel Chat Flows: Page 13 to 16 <p>Siebel E-Commerce Admin Guide: (A/M)</p> <ul style="list-style-type: none"> • Page 101 • Page 105 • Page 108 • Page 111 • Page 121 • Page 123 • Page 126 <p>Siebel E-Support Admin Guide: (A/M)</p> <ul style="list-style-type: none"> • Page 113 | <p><i>work items. In addition, agents may place work items on hold or transfer items to other agents using a choice of blind transfer, consultative transfer or conference transfer capabilities. This is the mechanism used to track the interaction through its life-cycle (receive/initiate, transfer, pause, forward and release/close). Activities & other types of records that are created whilst dealing with an interaction are automatically associated with the work item providing the ability to track and provide status information regarding the interaction. Associated records must be saved before releasing/closing the work item.</i></p> <p><i>The Siebel Communications Toolbar also supports the capability for agents to engage in real-time chat with customers working alongside the Siebel Chat module. Siebel Chat is a Web-based application for handling secure chat communications, including the following:</i></p> <ul style="list-style-type: none"> • <i>Handling chat interactions using chat-related buttons on the communications toolbar of the Siebel Call Center application.</i> • <i>Conducting chat conversations with a customer by using frequently used text (FUT), the URL library, and by searching the knowledge base and sharing resolutions.</i> • <i>Creating activities and service requests from chat interactions.</i> • <i>Transferring chat interactions to workgroups.</i> • <i>Wrapping up and terminating chat sessions.</i> <p><i>Examples of customer facing and agent facing chat flows (or end-user processes) have been provided to explain how this works in practice.</i></p> <p><i>Chat requests are typically initiated through a web-based self-service channel. Siebel's E-Commerce and E-Support self-service applications provide customers with the following capabilities to serve themselves through the web channel:</i></p> <p>E-Commerce:</p> <ul style="list-style-type: none"> • <i>Browse, Login and Review their Account</i> • <i>Contact the CSP via Email or Chat</i> • <i>Look up their Products, Assets, and Orders</i> • <i>Browse and Search the CSPs Commercial Product Catalogs</i> • <i>Configure Products or Promotions</i> • <i>Create and Manage Orders</i> • <i>View and Modifying their Assets (aka purchased Products & Services)</i> <p>E-Support:</p> <ul style="list-style-type: none"> • <i>Browse, Login and Review their Account</i> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|---|
| | <ul style="list-style-type: none"> • Page 197 to 199 <p>Siebel ASI Reference: (A)</p> <ul style="list-style-type: none"> • Page 16 to 18 | <p>protocols, such as SOAP, UDDI, and WSDL.</p> <p><i>There are many ASI's provided as standard, several of which are specific to the Communications industry.</i></p> <p>Based on the specific transaction type and involved external party, this conformance will require the identification of the necessary data formats to be sent externally, and conversion of externally received messages into the required internal enterprise formats. In addition, interactions with external parties may require that messages and transactions need to be undertaken with defined and agreed orchestration for message exchange.</p> <p><i>Inbound ASIs can be built using data synchronization services. Within data synchronization services, a data map translates the data in the form of integration objects between an internal integration object and an interface integration object, making the externally published ASI interface independent from the underlying Siebel CRM system. This design allows for both the ability to support external messages and data formats and the conversion of externally received message formats (which might be required by a 3rd party) into the internal message format expected by the underlying Siebel system.</i></p> <p>The actual agreement between the parties to use specific interaction standards is part of the Support Customer Interface Management and Support Selling L3s.</p> <p><i>Noted. The Support Customer Interface Management and Support Selling L3s will own the agreement between 3rd parties and the implementation of the required interaction interfaces.</i></p> |

1.1.1.4 – Selling (tabular)

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|---|
| 1.1.1.4 Selling | Alignment | Mapping Comment |
| <p>1.1.1.4.4 Acquire Customer Data</p> | <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Siebel Accounts: Page 47 to 49 <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Siebel Opportunities: Page 113 to 115 <p>Siebel Order Mgmt Guide: (A/M)</p> | <p>Brief Description Capture and record all pertinent customer data required for the initiation, realization and deployment of the agreed sales proposal.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The purpose of this process is to capture and record all pertinent customer data required for the initiation, realization and deployment of the agreed sales proposal.</p> <p><i>The selling process within Oracle's RODOD solution is exclusively managed from within the Siebel CRM solution. An 'Account' is the central entity used within Siebel, and all selling related customer data is associated with this key entity, e.g. leads, opportunities, quotes, orders, agreements, profiles (customer, billing, etc.), installed assets, etc. This section of the documentation illustrates a sequence of procedures performed by an end-user to set-up and configure a customer Account.</i></p> <p>In most standard offerings the necessary customer data is often captured on the sales proposal agreement form associated with the standard offerings.</p> <p><i>See Note 1: In Siebel terminology an Opportunity is any lead that could result in a sale, and is therefore the primary entity used for gathering the necessary customer data associated with a sales proposal. Detailed information about the configuration of the customers proposed products and services will generally be captured in a customer Quote or Order, which may or may not be associated with an Opportunity. Opportunities are most likely to be used to support a B2B sales situation. This section of the documentation describes how an end-user would use the Opportunity functionality to capture the sales proposal information against a customer account.</i></p> <p>For non-standard and/or complex sales agreements associated, for instance, with a customer RFP, extensive customer information may be required to plan and roll-out the agreed solution.</p> <p><i>See Note 1: Typically most sales proposals in the Communications industry in both consumer and</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|--|
| | <ul style="list-style-type: none"> Asset-Based Ordering: Page 205 to 213 <p>Siebel Order Mgmt for Comms Guide: (A/M)</p> <ul style="list-style-type: none"> Network Ordering: Page 369 to 384 <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> Business Functions in Siebel Comms: Page 22 to 24 | <p><i>business market segments are complex in nature. Offerings can contain both physical goods and services, each of which may need to be uniquely configured based on the customers preferences, and have complex and varying price types, e.g. one-time, recurring and usage-based charging. Once a customer has successfully purchased a service, the related assets usually need to be tracked so future changes to the installed services and assets can be changed (upgraded, disconnected, added to, etc.). Siebel's 'Asset-Based Ordering' supports these types of complex requirements, and the referenced documentation provides an overview of this capability and a use case of how an end-user might use this functionality.</i></p> <p><i>For example, Centrex designs require extensive capture of details surrounding deployment of handsets, features associated with each handset, customer Centrex groups, etc.</i></p> <p><i>In many cases the Siebel Configurator has the capability to handle the configuration and validation of complex products in its own right. However for configuring complex orders for services such are large networks with 100's of nodes and potentially 1000's of connections, Siebel provides an advanced 'Network-Ordering' capability. Used in conjunction with Asset-Based Ordering, this is an ideal tool where a bespoke design of a network service is required for a customer, with potentially complex configuration required at each site or node.</i></p> <p><i>In some cases the necessary level of precise detail may be available from the Develop Sales Proposal. Where this is not the case, this process is responsible for determining the precise customer information required to support the agreed proposal, capturing (through forms, or customer interviews, etc.) the required customer information, and storing the details in a form required by other processes.</i></p> <p><i>The precise customer information required to support the agreed proposal with the customer will be captured by the end-user through a series of application screens that support the related business functions, as mentioned above. The Account will represent the overall customer organisation, against the account there may be several associated Profiles (e.g. Billing, Financial), Agreements will be used to define agreed terms and conditions, Opportunities will be used to manage the sales opportunity and Quotes and Orders will be used to define the precise configuration of the product and services being bought. A more comprehensive list of business functions that supports the end-user in the</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|---|---|--|
| | | <p><i>gathering of customer information is provided in the 'Business Functions in Siebel Comms' section of the referenced documentation.</i></p> |
| <p>1.1.1.4.7 Manage Sales Accounts</p> | <p>Siebel Apps Admin Guide: (A/M)</p> <ul style="list-style-type: none"> • About Opportunities: Page 349 to 350 • Opportunities Scenarios: Page 350 to 351 • Opportunities Activities: Page 360 • Lead Qualification & Sales Methods: Page 353 to 354 • Organisation Analysis: Page 362 to 365 | <p>Brief Description Manage the sales accounts assigned to the sales channel on a day-day basis</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The purpose of the Manage Sales Accounts processes is to manage the sales accounts assigned to the sales channel and/or sales manager on a day-day basis.</p> <p><i>Day-to-day sales accounts are generally managed through Siebel Opportunities. An opportunity can either represent a lead or an opportunity (which is a qualified lead) and is defined as a potential revenue-generating event.</i></p> <p><i>Siebel Marketing can be used in the prospecting process to generate leads, which will be automatically assigned to the most qualified sales rep through the Siebel assignment manager. The sales rep will use Siebel to accept, develop and qualify the lead, which may result in it becoming a qualified opportunity.</i></p> <p>These processes are responsible for contacting the customers associated with each sales account on a regular basis appropriate for the type of account,</p> <p><i>Activities and Activity Plans can be used to track and drive (using automatic notifications) activities for opportunities by maintaining a calendar and to-do list for the opportunity, and delegate activities to other sales team members.</i></p> <p><i>Activities are also used to help guide sales reps using formally defined sales methodologies. A sales method can encompass all activities associated with the sales process, from prospecting to forecasting to closing deals.</i></p> <p>to develop the appropriate relationships and contacts,</p> <p><i>Siebel supports the end-user by helping to develop relationships and contacts leveraging capabilities such as the automatic creation of organization charts to help the user analyze their key contacts and capabilities such as mapping the politics in the</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|--|
| | <ul style="list-style-type: none"> • Enterprise Selling Process: Page 405 to 407 • Target Account Selling: Page: 419 to 421 • Portfolio Management: Page: 435 to 437 | <p><i>customer organization by identifying informal lines of influence between contacts. This helps the end user to develop the right relationship strategy to win the opportunity</i></p> <p>to prospect for leads, to promote the enterprise's product offerings, etc</p> <p><i>As described above, Opportunities are used to manage sales accounts but Siebel CRM also provides a number of modules specifically aimed at helping to comprehensively manage different types of sales accounts. These modules provide functionality to help guide sales professionals through the process of managing their sales accounts:</i></p> <ul style="list-style-type: none"> • <i>The Enterprise Selling Process (ESP) module helps sales professionals identify the customer's business drivers and initiatives, uncover opportunities in key business and service units, develop global account strategies, manage key executive and partner relationships, and coordinate team activities.</i> • <i>The Target Account Selling module provides full support for the Target Account Selling (TAS) sales methodology. Using the Target Account Selling methodology and the Target Account Selling module, sales professionals can assess opportunities, conduct organizational and competitive analysis, and develop and execute effective sales strategies.</i> • <i>The Portfolio Management Process (PMP) is an account-based, structured methodology for sales professionals who manage a portfolio of accounts, and who must be responsible for, penetrate, retain, and grow those accounts. A portfolio contains a set of accounts organized by industry application, geographic location, and so on. Typically, a portfolio contains strategically important accounts that represent high-potential business for the sales organization.</i> |
| <p>1.1.1.4.3 Negotiate Sales Contract</p> | | <p>Brief Description Close the sale with terms that are understood by the customer, and are mutually agreeable to both the customer and the service provider.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The purpose of this process is to close the sale with terms that are understood by the customer, and are mutually agreeable to both the customer</p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|---|
| | <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Siebel Agreements: Page 84 to 85 <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Siebel Agreements: Page 85 | <p>For complex sales proposals associated with customer RFPs this process may extend over long time periods and require extensive interaction with customers to achieve agreement. Aspects of contract price determination may include issues of CPE prices from third party vendors, allowances based on customer location, etc.</p> <p><i>For complex sales proposals, Agreements can be developed and tailored to the unique requirements of the customer over time and through negotiation with the customer. Siebel Agreements allows for many types of tailored agreements to be created including; a contract that typically covers the ongoing relationship between customer and service provider, a sales agreement covering things like price/discounts/special rates/financing/etc., a service agreement covering services covered/price/SLAs/maintenance/warranty/etc., and so on.</i></p> <p><i>For the most complex agreements Siebel also supports the concept of Master & Sub-agreements. If, for example, a large commercial account requires a master agreement and one or more sub-agreements, end users can designate the main agreement as a master agreement and then generate its associated sub-agreements.</i></p> <p>For RFPs, many of the commercial terms being sought may be developed or originated by the customer, and the negotiating team may need to develop strategies to achieve acceptable commercial outcomes.</p> <p><i>Data from which to build agreements comes from the agreement library in Siebel Communications. In the more complex cases, where a customer has defined their own terms as part of a formal RFX process, through negotiation with the Sales and Legal teams – customer specific terms once agreed can be added into the agreement library by the sales or legal team administrators for use in a customer’s specific contract/agreement. The agreement library is a data repository developed by your company’s sales and legal organizations, it includes information such as recommended and required text for agreement sections, answers to agreement questions, sample cover letters, and sample executive summaries.</i></p> <p>The sale is concluded through negotiations and joint agreement on features, service levels, pricing and discounts, resulting in a sign-off formal agreement/contract between the customer and service provider. Depending upon specific circumstances, final agreement from the Service</p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|--|
| | <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Siebel Agreements: Page 89 to 90 <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Siebel Agreements: Page 90 to 91 | <p>Provider's perspective may require escalation to, and agreement from, an appropriately delegated manager. The formal agreement could include zero or more confirmed orders from the customer.</p> <p><i>Following the conclusion of formal negotiations, final approval of the contract and terms will need to be sought from the 'Approver' (tracked against the agreement), who is the designated member of the agreement team who is authorized to approve the agreement. Siebel also provides the ability to 'Auto-Document' the agreement where the agreement sections are assembled into a Microsoft Word file according to the template selected, and inserts the specific information from the customer's agreement record. The document can be edited, printed and signed, as necessary. The saved Word document is then automatically associated with the agreement record.</i></p> <p>These orders are then passed on as requests to allow formal Customer Orders to be generated and processed.</p> <p><i>Following the finalisation of a customer's Agreement, new quotes and orders generated for that customer / account will have the Agreement tied to it to ensure the agreed terms and conditions are applied.</i></p> |
| <p>1.1.1.4.5 Cross/Up Selling</p> | <p>Siebel Order Mgmt Guide: (A/M)</p> <ul style="list-style-type: none"> • Product Recommendations: Page 113 to 124 • Scenario for Product Recommendations: | <p>Brief Description</p> <p>Ensure that the value of the relationship between the customer and service provider is maximized by selling additional, or more of the existing, products.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description</p> <p>The purpose of this process is to ensure that the value of the relationship between the customer and service provider is maximized by selling additional, or more of the existing, products.</p> <p><i>Siebel Order Management provides a number of mechanisms for driving cross and up-sell across the customer base. This section of the Order Management guide provides details on how a marketing administrator can define up-sell and cross-sell recommendation rules which are executed during the order capture process.</i></p> <p><i>The reference provided here gives an example scenario of how a marketing administrator would configure the required cross-sell and up-sell rules</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|---|
| | <p>Page 114 to 115</p> <ul style="list-style-type: none"> • Cross-sell & Up-sell Recommendations: (A/M) <p>Oracle RTD for Siebel Intelligent Offer Generation: (A/M)</p> <ul style="list-style-type: none"> • Overview: Page 7 to 10 • Inbound Offer Management: Page 87 to 101 <p>(Available to customers & partners at support.oracle.com)</p> <ul style="list-style-type: none"> • End-user Scenarios: Page 93 to 95 | <p><i>within the commercial product catalogue, and how these rules will automatically drive recommendations to an end user which they can accept or reject during an interaction with a customer. As an end-user, when a sales rep (e.g. CSR) adds a product or service to a customer order Siebel will automatically evaluate all cross-sell and/or up-sell rules associated with the product and display a list of ranked messages. The sales rep can accept or reject the recommendation messages; when accepting, the appropriate product or service will automatically be added to the order, upon rejection the rules will be automatically re-evaluated and the resulting ranked messages displayed to the sales rep.</i></p> <p><i>The reference provided here gives an example screenshot of how cross-sell and upsell recommendations are automatically presented to an end-user, and how they would accept or reject these system generated recommendations.</i></p> <p>The ongoing analysis of customer trends (e.g. usage, problems, complaints) is used to identify when the current offerings may no longer be appropriate for the customer, or when the opportunity for a larger sale arises. Based on the data collected, more appropriate offerings should be recommended to the customer.</p> <p><i>As well as standard cross-sell and up-sell rules that are available to marketers as part of the standard Siebel Order Management capabilities, Oracle provides a sophisticated real-time decisioning (RTD) engine that is pre-integrated with the operational CRM system to provide intelligent Offer recommendation and Retention management features across multiple channels such as call-centre and E-Commerce. Oracle RTD service combines predictive analytics technology with dynamic eligibility rules and scoring rules to maximize the value from customer interactions. The criteria for rules can be based on a variety of attributes, for example, historical and transactional data from Siebel CRM, the age of a customer, the salary of a customer, recent sales, recent trouble-tickets, recent life events, and so on. RTD can anticipate customer needs in real time automatically, and adapt each interaction to the needs of the customer.</i></p> <p><i>RTD proactively makes a decision about the best way to proceed with the customer in the context of the specific interaction (e.g. is an up-sell, cross-sell, or retention activity most appropriate) and presents this to the end user (e.g. a CSR in a contact-centre, or a customer on the web) for their evaluation.</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|---|
| | <ul style="list-style-type: none"> • RTD Recommendations: (A/M) | <p><i>The reference provided here gives an example screenshot of how RTD recommendations (Retention Actions and Intelligent Offers) are automatically presented to an end-user, and how they would accept or reject these system generated recommendations.</i></p> |

1.1.1.5 – Order Handling (tabular)

| Business Process Framework Process Element | Software Vendor Mapping | |
|---|--|---|
| 1.1.1.5 Order Handling | Alignment | Mapping Comment |
| <p>1.1.1.5.1 Determine Customer Order Feasibility</p> | <p>Siebel Product Administration Guide: (A/M)</p> <ul style="list-style-type: none"> Product & Promotion Eligibility: Page 353 to 356 Product & Promotion Compatibility: Page 364 to 366 | <p>Brief Description Check the availability and/or the feasibility of providing and supporting standard and customized product offerings where specified to a customer.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The purpose of the Determine Customer Order Feasibility process is to check the availability and/or the feasibility of providing and supporting standard and customized product offerings where specified as part of the standard product offering process flow, to a customer.</p> <p><i>The Oracle RODOD solution supports two primary types of Customer Order Feasibility checks:</i></p> <ul style="list-style-type: none"> Commercial Order Feasibility – these commercial order feasibility checks are performed by the Siebel CRM solution Technical Order Feasibility – these technical feasibility checks are performed by Order & Service Management leveraging the Technical Service Qualification capability <p><i>For Commercial Order Feasibility Siebel firstly enforces ‘Product & Promotion Eligibility’ rules. Product and promotion eligibility allows a Product Manager to manually create rules specifying which customers are eligible to buy a product and which customers are eligible for product promotions. Some examples of product eligibility are; A CSP may have different wireless plans available for different geographical areas, or an ISP may have certain DSL services only to customers who live within a specified distance of certain cities. These rules are automatically evaluated and enforced at ‘run-time’ to ensure that to products are sold to ineligible customers.</i></p> <p><i>Another important aspect of Commercial Order Feasibility is enforcing ‘Product & Promotion Compatibility’ rules. Compatibility allows a Product Manager to manually define rules specifying which combinations of products, product attributes, or product promotions are required and which combinations are not allowed. Some examples of product compatibility are; When selling a 4g/LTE wireless plan an LTE enabled handset must be provided as part of the bundle, or an ISP must provide an 8mbps speed line (or higher) if selling</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|---|
| | <p>Siebel Order Mgmt for Comms Guide: (A)</p> <ul style="list-style-type: none"> Submitting an Order for TSQ: Page 82 to 83 <p>E17427-01: (A)</p> <ul style="list-style-type: none"> Understanding the O2A Process: Page 11 to 29 O2A Business Process Flows: Page 15 to 19 | <p><i>IPTV as part of the bundle. These rules are automatically evaluated and enforced at 'run-time' to ensure that no incompatible products are sold to end-customers.</i></p> <p><i>Once all the Commercial Order Feasibility checks have been performed then Technical Order Feasibility checks can be performed.</i></p> <p><i>Oracle's integrated RODOD solution supports the concept of Technical Service Qualification (TSQ) as part of the overall Order Handling process. Firstly, Siebel CRM supports the concept of submitting a commercially qualified Sales Order specifically for the purpose of technical qualification, pages 82 & 83 of the Siebel Order Management guide describes how sales orders can be submitted for technical qualification. TSQ orders can be submitted for standard and fully customized product offerings. As the TSQ order is processed by Order & Service Management after order submission the fulfilment status in the sales order is automatically updated (possible values; Pending TSQ, Passed TSQ, Failed TSQ). If the order does not pass the TSQ qualifications then the 'Status Context' field will be automatically populated with an explanation of why the line item failed the TSQ.</i></p> <p>These processes invoke requests to SM&O provisioning processes to determine the availability and supportability of product offerings to a customer. These processes are also responsible for determining whether the offering can be supported by other CRM processes.</p> <p><i>Once a commercial Sales Order is submitted from Siebel CRM for technical qualification, this is passed seamlessly through the out-of-the-box AIA based 'Order-to-Activate' integration to Order & Service Management (OSM). OSM understands that this order is for qualification rather than for delivery and dynamically generates an orchestration plan so the technical feasibility of the order can be determined. OSM executes the orchestration plan and invokes a request (or several requests if the customers order contains more than one service that needs to be provisioned) to the SM&O provisioning process. The resulting provisioning order in the SM&O 'designs' the requested service, but does not 'assign' and 'activate' (because this is a 'qualify' order rather than a 'deliver' order) and reports back to OSM with a status update, i.e. was the design process completed successfully. If yes then this part of the customers service is technical feasible to be provisioned. The results of the Order Feasibility check are automatically passed back to the originating Siebel CRM Sales Order as status</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|---|
| | | <p>updates, both at the order-line and order-header levels. This provides comprehensive cross-channel visibility of the TSQ to both the agent and the customer.</p> |
| <p>1.1.1.5.2 Authorize Credit</p> | <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Profiles: Page 67 to 68 <p>Siebel Order Mgmt Guide: (A/M)</p> <ul style="list-style-type: none"> • Integrating with 3rd Party Credit-Check: Page 63 - 70 <p>E15769-01: (A)</p> <ul style="list-style-type: none"> • Credit Check Integration Flow: Page 119 - 126 | <p>Brief Description Assess a customer's credit worthiness in support of managing customer risk and company exposure to bad debt</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The purpose of the Authorize Credit processes is to assess a customer's credit worthiness in support of managing customer risk and company exposure to bad debt. This process is responsible for initiating customer credit checks and for authorizing credit and credit terms in accordance with established enterprise risk and policy guidelines.</p> <p><i>From an end-user perspective, the process of assessing a customer's credit worthiness is initiated against a customer's account from within the Siebel CRM application. An end-user can create a 'Financial Profile' against an account from which a credit-check on the customer can be performed, either through integration with a 3rd party credit bureau, or internal back-end systems.</i></p> <p><i>Siebel CRM provides a comprehensive framework for integrating to 3rd party credit-check applications, and for controlling how, when and by whom credit-checks should be performed from an end-user perspective. End-users are guided as to when credit-checks need to be performed, and this can be configured based on an organisations requirements. By default credit checks will only be performed if; Payment Method = Purchase Order, Skip Credit = No, PO Amount > Credit Auto-Approval Limit. The documentation provides further details on how Administrators & End-users can adjust the Credit Auto-Approval limits for accounts, how auto credit-checks can be skipped for an account, and restricting who can administer credit-checking. This chapter in the Siebel Order Management guide discusses this in detail.</i></p> <p><i>Typically when business customers are paying for products and services with purchase orders, a back-office AR or credit management application will perform the actual credit-check on the customer account. It is the responsibility of the 3rd party AR application to make a credit determination in accordance with risk and policy guidelines using the previous history with the customer account and</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|---|--|---|
| | | <p>other credit data. Oracle provides out-of-the-box AIA based integration between Siebel CRM and Oracle E-Business to enable a synchronous credit-check call initiated from Siebel CRM. As standard Siebel supports credit checks against both Quotes & Sales Orders, however this OOTB integration has only been enabled to work with Sales Orders.</p> |
| <p>1.1.1.5.6 Issue Customer Orders</p> | <p>Siebel Order Mgmt Guide: (A/M)</p> <ul style="list-style-type: none"> Asset-Based Ordering: Page 205 to 212 <p>Siebel Order Mgmt Guide: (A/M)</p> <ul style="list-style-type: none"> Checking Credit for a PO: Page 165 | <p>Brief Description Issue correct and complete customer orders.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The purpose of the Issue Customer Orders processes is to issue correct and complete customer orders. These processes ensure that all necessary information about the Customer Order (for example, type of product, install address, special requirements, etc.) is available.</p> <p>Siebel CRM provides CSRs, customers and partners the ability to work with and define complete, accurate and validated quotes & orders using Asset-Based Ordering (ABO). ABO ensures that all necessary information about a customer's order is collected and available and allows CSPs to:</p> <ul style="list-style-type: none"> Generate asset records from orders (automatic) Create quotes for new products and services using existing assets (user driven, supported by application functionality) Create quotes to modify existing products and services (user driven, supported by application functionality) Modify in-process orders that have been submitted for fulfillment (user driven, rules enforced through application and integration logic) Suspend, resume, or discontinue an existing service (user driven, supported by application functionality) Have visibility into the asset life cycle during customer interactions <p>The customer orders may be required to satisfy pertinent customer requests from the Selling processes (in particular taking into account the purchase order from Negotiate Sales),</p> <p><i>See Note 1: When a Purchase Order has been selected as the payment type for a quote or order during the Negotiate Sales process, this will be an important aspect of the order that is submitted during this process. For example, Siebel will automatically enforce the requirement for a PO</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|--|
| | <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> Scenarios for Agreements: Page 85 to 87 <p>Siebel Order Mgmt Guide: (A/M)</p> <ul style="list-style-type: none"> Modifying an Asset: Page 215 to 216 <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> Opportunities in Siebel for Comms: Page 113 to 120 | <p><i>credit-check if the PO Amount is greater than the Credit Auto-Approval limit. See 1.1.1.5.2 for more details.</i></p> <p>¹ <i>Agreements & Entitlements will often be negotiated and defined during the selling process. These legally binding commercial agreements, both simple & complex (each potentially with multiple levels, each with different terms, conditions & discounts), can be associated with an order (and revised if necessary) to ensure negotiated terms through the selling process are enforced during the order handling processes.</i></p> <p>may arise as a result of requests for customer provisioning activity to satisfy customer problem restoration activities, may arise to alleviate customer performance issues.</p> <p><i>See Note 1:</i> Where a customer is experiencing a fault or performance issues with their provisioned services, Siebel Asset-Based Ordering can be used to change a customer's service configuration by re-configuring their problematic 'Installed Assets' and submit/issue this change order for provisioning.</p> <p>These processes assess the information contained in the customer order relating to the sales request or initiating customer process request to determine the associated customer orders that need to be issued.</p> <p><i>When negotiating in a more complex sales cycle (typically in a B2B situation), an Opportunity will be used to help manage the sale. Siebel CRM allows sales representatives to manually add the relevant products and services required by the customer against the opportunity, and forecast against these. To ensure consistency when providing formal quotations to the customer, and when ultimately an order is placed, Siebel allows Quotes to be automatically generated from an Opportunity as also automatically update an Opportunity with product information defined in the Quote. Siebel also supports the automatic creation of an Order from a Quote agreed with a customer. This coordination of data across Opportunities, Quotes and Orders ensures that when an Opportunity closes with a customer the associated customer orders that need to be issued are well understood and managed.</i></p> <p>The issued customer order may require a feasibility assessment.</p> |

¹ Provided as additional context

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|---|
| | <p>Siebel Order Mgmt for Comms Guide: (A)</p> <ul style="list-style-type: none"> Submitting an Order for TSQ: Page 82 to 83 <p>Siebel Order Mgmt Guide: (A)</p> <ul style="list-style-type: none"> Creating a Quote or Order: Page 213 to 215 <p>Siebel Order Mgmt Guide: (A)</p> <ul style="list-style-type: none"> Creating a Modify Quote or Order: Page 215 to 216 <p>Siebel Order Mgmt for Comms Guide: (A)</p> <ul style="list-style-type: none"> Processing a Sales Order through AIA: Page 69 to 74 <p>Siebel Order Mgmt Guide: (A)</p> <ul style="list-style-type: none"> Revision Orders: Page 220 <p>E17427-01: (A)</p> <ul style="list-style-type: none"> Revision Orders Design Considerations: Page 23 to 24 | <p><i>TSQ Order: As discussed in 1.1.1.5.1, Siebel CRM supports the concept of submitting a Sales Order specifically for the purpose of technical qualification, pages 82 & 83 of the Siebel Order Management guide describes how sales orders can be submitted for technical qualification.</i></p> <p>may require new provisioning activities,</p> <p><i>Orders (or quotes) for new products and services against an account or contact that require new provisioning activities are the simplest type of Asset-Based Order (ABO), which is supported by Oracle's Order-to-Activate (O2A) productised integration between Siebel & OSM. This is classified as a 'New' customer quote or order.</i></p> <p><i>Change orders (or quotes) against a customer's existing products or services (aka Installed Assets) is another example of an order type supported by Siebel's ABO and the O2A process integration. This is classified as a 'Modify' customer quote or order.</i></p> <p><i>Once a customers' Order is ready for submission it is submitted and processed through the O2A AIA based integration, which will result in the execution of the required provisioning activities for the successful fulfilment of the order.</i></p> <p>may require a change to a previously issued customer order,</p> <p><i>Changes to 'in-flight' customer orders tend to be an order-of-magnitude more complex to handle than simple order types such as New and Modify orders. The combination of Siebel's ABO, OSM and the O2A AIA based integration supports several 'in-flight' order types, including:</i></p> <p><i>Revision Orders (inflight): The fulfillment of certain services may take days and weeks, and some B2B and infrastructure projects may take months to complete. During this period, customers change their minds and request changes to their orders that become revision orders in Siebel. In many cases, continuing the base order when a revision is submitted is costly for the CSP, and sometimes the operation cannot be fully undone. For these reasons, support for revision orders provides the following benefits:</i></p> <ul style="list-style-type: none"> <i>Enhances customer satisfaction by allowing customers to change their orders within an agreed-upon limit.</i> <i>Reduces the costs associated with fulfilling unwanted goods and services requests and wasting system capacity, unrecoverable</i> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|--|
| | <p>Siebel Order Mgmt Guide: (A)</p> <ul style="list-style-type: none"> Follow-On Orders: Page 221 <p>E17427-01: (A)</p> <ul style="list-style-type: none"> Follow-On Orders Design Considerations: Page 27 <p>Siebel Order Mgmt for Comms Guide: (A)</p> <ul style="list-style-type: none"> Cancelling and Order: Page 81 <p>E17427-01: (A)</p> <ul style="list-style-type: none"> Revision Orders Design Considerations: Page 24 <p>Siebel Order Mgmt Guide: (A)</p> <ul style="list-style-type: none"> Deactivating an Installed Asset: Page 222 to 223 | <p>resources, acquired stock, and so forth.</p> <ul style="list-style-type: none"> Reduces human intervention to manually retrofit data records when recovery cannot be automated. <p><i>Follow-on Orders (inflight but past PONR):</i>The fulfillment of some services may take days and weeks, and some B2B and infrastructure projects may take months to complete. During this period, customers change their minds and request order changes that become revision orders in Siebel if the subject order lines did not reach the Point-of-no-Return (PONR) or become follow-on orders otherwise. In many cases, not taking an order pending the completion of in-flight orders is not acceptable; hence, Siebel simulates the future state of in-flight orders and allows for the creation and submittal of follow-on orders that are nothing more than change orders based on the projected future state of a customer's assets.</p> <p>or may require cancellation of a previously initiated customer order.</p> <p>The Oracle RODOD solution treats the cancellation of an in-flight Order as a type of 'Revision' order. Order to Activate supports these cancellation patterns:</p> <ul style="list-style-type: none"> Cancel the entire order. Siebel introduced a Cancel Order button that resubmits the order with the Fulfillment Mode order header attribute value set to CANCEL. Drop an order line. When an ADD for a new product is dropped, Siebel will drop the order line from the revision order. Creating a revision order that drops all orders lines produces the same effect as cancelling the entire order. <p>The customer order may also relate to the cancellation of previously purchased specific services.</p> <p>Siebel ABO can also be used to create a Disconnect or Deactivate order that will cancel or disconnect an existing service.</p> <p>Other useful order types supported by Siebel ABO not mentioned explicitly here include Suspend and Resume orders; when you create a suspend order, you stop a service, the customer is still the owner of the service, but no service is being delivered. When you create a resume order, you recommence a service that has been suspended.</p> <p>Where, the initiating request for a purchased product offering has a standard customer order</p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|--|
| | <p>Siebel Order Mgmt Guide: (A)</p> <ul style="list-style-type: none"> The Order Management Life-cycle: Page 16 to 17 | <p>this process is responsible for issuing the customer order, and for creating a record of the relevant initiating sales request and the associated customer order. Where the initiating request for a purchased product offering has special or unusual requirements, and a specific feasibility assessment has been previously undertaken, this process is responsible for issuing the customer order, and for creating a record of the relevant initiating request information and the associated customer order.</p> <p><i>This process is tracked through the 'Order Management Life-cycle'. One example of how order management might be used is provided here, however end users may start the order management process at a number of different screens and views, but the underlying order management cycle is essentially the same:</i></p> <ul style="list-style-type: none"> An opportunity is created to track a customer's interest in products & services A quote is automatically generated from the opportunity and the products & services are configured to the customer's specific requirements The quote is accepted and automatically converted to a sales order Order validation and enrichment tasks are performed such as ATP checks, TSQ checks, credit checks, attaching PO's, etc. Order is submitted to provisioning/activation On order completion the appropriate product order line-items are automatically created as 'Installed Assets' These 'Installed-Assets' are associated with the customer account and are a central part of the customer's service profile. <p><i>A more complete description of the Order Management Life-cycle has been provided in the associated reference.</i></p> <p>Where the initiating request for a purchased product offering has special or unusual requirements, and a specific feasibility assessment has not been previously undertaken, this process marks the issued customer order as requiring special handling, and passes management for further processing to the Track & Manage Customer Order Handling process.</p> <p><i>In Oracle's RODOD solution, the need for a Technical Service Qualification (TSQ) order is controlled at the CRM layer. If a TSQ on a special or unusual product or service is required this will be initiated from the Sales Order in CRM and handed to the 'Track &</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|---|
| | | <p><i>Manage Customer Order Handling' process for qualification. If the 'Qualify Order' passes the TSQ then the sales order can be submitted for 'Delivery' down to the 'Track & Manage Customer Order Handling' process. Further details on RODOD's support for TSQ is provided above.</i></p> <p>The orchestration, if required, and tracking of the customer order progress is the responsibility of the Track & Manage Customer Order Handling processes.</p> <p><i>See Note 2: Once a commercial order is submitted from Siebel, Oracle's Order & Service Management (OSM) is responsible for the orchestration and tracking of the customer order. See the following section (1.1.1.5.4) for further details.</i></p> |
| <p>1.1.1.5.4 Track & Manage Customer Order Handling</p> | <p>E17427-01: (A)</p> <ul style="list-style-type: none"> Understanding Order to Activate: Page 11 to 29 <p>E17427-01: (A)</p> <ul style="list-style-type: none"> Understanding | <p>Brief Description Ensure customer provisioning activities are assigned, managed and tracked efficiently to meet the agreed committed availability date</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The objective of the Track & Manage Customer Order Handling processes is to ensure customer provisioning activities are assigned, managed and tracked efficiently to meet the agreed committed availability date.</p> <p>Responsibilities of these processes include, but are not limited to:</p> <p><i>The Order to Activate business process is at the core of business and operational support systems for any Communications Service Provider (CSP). The process extends from the time a quote or order is created, to the time when the goods and services are delivered and properly billed.</i></p> <p><i>The AIA based Order to Activate Process Integration Pack (PIP) works with the Order to Bill PIP and participating applications to enable the orchestration, tracking and handling of the customer order, including support for these business processes:</i></p> <ul style="list-style-type: none"> Scheduling, assigning and coordinating customer provisioning related activities; Generating the respective service order creation request(s) to Issue Service Orders based on specific customer orders; <p><i>A customer order is captured in CRM. Once an order is complete and validated in CRM, it is submitted to</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|--|
| | <p>Order to Activate: Page 11 to 29</p> <ul style="list-style-type: none"> Deliver Customer Order Flow: Page 17 <p>E18012-01: (A)</p> <ul style="list-style-type: none"> About the Task Web Client: 1-1 to 1-4 | <p><i>OSM (Central Order Management) for delivery. Customer orders (both Qualify and Deliver request types) received in OSM are first recognized (as AIA Customer Orders), mapped to fulfillment patterns, and enriched with fulfillment metadata. OSM decomposes and orchestrates the customer order. OSM divides the order into sub-orders, called order components, which have cross-order components, cross-order lines, and cross-order dependencies, to reflect the specific demands of the CSP. The outcome is an order orchestration plan. The fulfillment flow that is produced orchestrates fulfillment requests to different fulfillment providers using preconfigured fulfillment functions, such as sync customer into billing, initiate and fulfill billing, provision order, ship order, and install order.</i></p> <p><i>The swimlane diagram on page 17 of the referenced documentation illustrates this process flow. In the 'Order Lifecycle Management' swimlane there is a representative example of a dynamically generated orchestration plan that is created by Central Order Management (COM) from the customer order as described in the explanation above. You will see that one of the steps represented in this 'Sample Central Fulfillment Deliver Flow' is 'Provision Order'. This is a specific example of where the COM layer issues a Service Order down to the Provisioning/SM&O layer based on the specific customer order. This is what Oracle classifies as the SOM or 'Service Order Management' layer.</i></p> <p><i>This is a fully automated process unless specific manual processes have been built into the design of the order orchestration processes.</i></p> <ul style="list-style-type: none"> Escalating status of customer orders in accordance with local policy; <p><i>See monitoring jeopardy & escalations below.</i></p> <ul style="list-style-type: none"> Undertaking necessary tracking of the execution process; <p><i>A CSR or Customer can track the progress of their order through the status updates provided upstream to Siebel CRM from OSM during order execution. For detailed tracking of the execution process the OSM Task Web Client can be used. The Task Web Client provides the user interface for order tracking and operational reporting information. You use it to create, view, edit, track, and report on provisioning-level service orders and tasks in the OSM system.</i></p> <ul style="list-style-type: none"> Adding additional information to an existing customer order; |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|--|
| | <p>E18012-01: (A)</p> <ul style="list-style-type: none"> Manually Amending Orders: 3-21 to 3-24 <p>E18012-01: (A)</p> <ul style="list-style-type: none"> Adding Additional Info to Orders: 3-13 to 3-16 <p>E18012-01: (A)</p> <ul style="list-style-type: none"> Cancelling Orders: 3-19 to 3-21 <p>E18012-01: (A)</p> <ul style="list-style-type: none"> Jeopardy Notifications: 3-26 <p>E17427-01: (A)</p> <ul style="list-style-type: none"> Using Order Fallout Management in O2A: Page 81 to 90 <p>E18007-01: (A)</p> <ul style="list-style-type: none"> Order Fallout Management: 7-1 to 7-4 | <ul style="list-style-type: none"> Modifying information in an existing customer order; Modifying the customer order status; <p><i>In response to 1.1.1.5.6 we discussed the various options a CSR or customer has for modifying their in-flight orders through out-of-the-box integration between Siebel CRM and OSM (e.g. revision, follow-on, cancel orders). The OSM Task Web Client provides the ability for an Order Management back-office specialist to manually amend in-flight orders should the need arise.</i></p> <p><i>An Order Management back-office specialist can also add remarks and attach documents pertaining to each order using the Add Remark option. For example, if the task for an order has taken longer to complete than expected, you can add a remark explaining why this has happened.</i></p> <ul style="list-style-type: none"> Canceling a customer order when the initiating sales request is cancelled; <p><i>In response to 1.1.1.5.6 we discussed how a CSR or customer can cancel an in-flight order, and through out-of-the-box integration this cancellation flows through to OSM. The OSM Task Web Client also provides the ability for an Order Management back-office specialist to manually cancel in-flight orders should the need arise.</i></p> <ul style="list-style-type: none"> Monitoring the jeopardy status of customer orders, and escalating customer orders as necessary; and <p><i>Within OSM a jeopardy notification is a message that you can configure in Design Studio to occur under specific conditions, and to be sent to specific users or systems for escalation. You can configure jeopardy notifications to be sent once, periodically, or when certain conditions arise in an order or task to alert users or systems of processes, orders, or tasks that may be at risk.</i></p> <p><i>Fallout occurs when one or more errors are identified that prevent an order from being processed normally. Order fallout can occur at any point in the order's lifecycle and in multiple places. If an order goes into a fallout state this can cause the order to go into jeopardy because it will not be fulfilled. To mitigate the risk of the order reaching jeopardy status OSM detects, reports, and resolves order fulfillment fallout incidents such as system, validation, and fulfillment errors. Oracle's Order-to-Activate integration automates the creation of trouble tickets in CRM when fallout occurs to take</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|--|
| | <p>E17427-01: (A)</p> <ul style="list-style-type: none"> Order Update Design Considerations: Page 22 to 23 Understanding the Process Integrations for Siebel CRM: Page 67 - 72 | <p><i>advantage of the rich notification, reporting, and management capabilities of CRM.</i></p> <ul style="list-style-type: none"> Indicating completion of a customer order by modifying the customer order status. <p><i>Throughout the fulfillment process, OSM maps fulfillment function responses to common statuses, which are then aggregated into order line statuses and order header status values. The status management capability automatically updates the corresponding sales order in CRM with relevant customer status and milestone values. OSM also updates CRM when order lines reach their point-of-no-return (PONR) to prevent the submission of new in-flight revision orders. It also updates CRM with any enrichment to order lines that may have taken place during fulfillment. Ultimately, for a successful order, each order line-item status and then the order header status will be set to 'Completed' through up-stream notifications from OSM.</i></p> <p><i>On the completion of the order in CRM, the Asset Based Ordering (ABO) functionality in Siebel generates asset records against the customer's account based on the successfully completed order-lines. End-users can then use the Accounts screen to view the customer's Installed Assets, and if required create modify orders referencing the customer's existing assets.</i></p> <p>Note that some specific product components may be delivered directly by suppliers/partners. In these cases the Track & Manage Customer Order Handling process is responsible for initiating requests, through S/P Requisition Management for the delivery by the supplier/partner of the specific product components.</p> |
| | <p>E17427-01: (A)</p> <ul style="list-style-type: none"> Order Topology: Page 14 to 15 | <p><i><u>See Note 1</u>: In cases where partners or suppliers are responsible for provisioning or fulfilling certain elements of a customer's order (e.g. 3rd party used for shipping or WFM, 3rd partner service provider), OSM's Central Order Management functionality automatically decomposes the order into sub-orders, each of which targets a particular fulfillment provider. Any of these fulfillment providers could be either in-house or a 3rd party supplier or partner. For example the logical topology could be; three in-house billing providers based on customer segment (wholesale, residential, and business), three provisioning stacks based on service family and geography (in-house Mobile, partner VoIP, partner Broadband), two shipping providers, one for in-house products and another for partner supplier products, finally - one 3rd party workforce management provider for CPE installation. OSM is</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|---|---|--|
| | | <p>responsible for orchestrating the requests to these fulfillment providers and monitoring the subsequent responses. An example of this type of topology is provided in the documented reference.</p> |
| <p>1.1.1.5.5 Complete Customer Order</p> | <p>Siebel Apps Admin Guide: (A/M)</p> <ul style="list-style-type: none"> Activities: Page 181 to 182 | <p>Brief Description Manage customer information and interactions after customer contracts or associated service orders have been finalized and during the order completion phase</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The purpose of the Complete Customer Order processes is to manage customer information and interactions after customer contracts or associated service orders have been finalized and during the order completion phase. The customer may participate in commissioning or end-to-end testing and then satisfactory delivery. The customer is trained in the functionality and benefits of the solution. These processes are responsible for ensuring that any customer information required by other CRM processes is updated as part of the customer order completion.</p> <p><i>As described in response to '1.1.1.5.4 Track & Manage Customer Order Handling', OSM provides the central order management capability that manages the provisioning of a customer's order, delivering status updates to the CRM Sales Order as each milestone completes. Tasks that need to be performed by the customer and tracked after the order has been successfully provisioned and before the order can be officially 'closed (such as end-to-end testing, training, etc.) can be tracked and recorded as 'Activities & Activity Plans' against the Order. For example if a customer is required to perform a series of end-to-end tests for a new product or service this can be recorded as an 'Activity Plan' against the order-line that relates to that product or service. The final order will only be 'Closed' once all associated Activities against the order have been completed.</i></p> |
| <p>1.1.1.5.8 Close Customer Order</p> | | <p>Brief Description Close a customer order when the customer provisioning activities have been completed. Monitor the status of all open customer orders, and recognize that a customer order is ready to be closed when the status is changed to completed.</p> <p>Extended Description The objective of the Close Customer Order processes is to close a customer order when the</p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|--|
| | <p>E17427-01: (A)</p> <ul style="list-style-type: none"> Order Update Design Considerations: Page 22 to 23 Understanding the Process Integrations for Siebel CRM: Page 67 - 72 | <p>customer provisioning activities have been completed. These processes monitor the status of all open customer orders, and recognize that a customer order is ready to be closed when the status is changed to completed.</p> <p><i>Throughout the fulfillment process, OSM maps fulfillment function responses to common statuses, which are then aggregated into order line statuses and order header status values. The status management capability automatically updates the corresponding sales order in CRM with relevant customer status and milestone values. OSM also updates CRM when order lines reach their point-of-no-return (PONR) to prevent the submission of new in-flight revision orders. It also updates CRM with any enrichment to order lines that may have taken place during fulfillment. Ultimately, when all order components for the order are complete, OSM changes the order to the Completed state and communicates the status to the originating system, in this case Siebel CRM. The 'Track & Manage Customer Order Handling' process will then be responsible for closing the customer order in CRM and performing any post-order completion activities such as generating the customers 'Installed Asset' records.</i></p> |
| <p>1.1.1.5.7 Report Customer Order Handling</p> | <p>E18012-01: (A)</p> <ul style="list-style-type: none"> About the Task Web Client: 1-1 to 1-4 <p>E18012-01: (A)</p> <ul style="list-style-type: none"> Viewing Orders: 4-1 to 4-12 | <p>Brief Description Monitor the status of customer orders, provide notifications of any changes and provide management reports.</p> <p>Extended Description The objective of the Report Customer Order Handling processes is to monitor the status of customer orders, provide notifications of any changes and provide management reports.</p> <p><i>A CSR or Customer can track the progress of their order through the status updates provided upstream to Siebel CRM from OSM during order execution. For detailed tracking of the execution process the OSM Task Web Client can be used. The Task Web Client provides the user interface for order tracking and operational reporting information.</i></p> <p><i>The 'Viewing Orders' capability in OSM provides real-time visibility of orders, and allows an end-user to find orders, view order histories, and view order reports.</i></p> <p>These processes are responsible for continuously monitoring the status of customer orders and managing notifications to processes and other parties registered to receive notifications of any</p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|--|
| | <p>E18007-01: (A)</p> <ul style="list-style-type: none"> • How OSM Processes an Order: 2-1 to 2-4 <p>E18012-01: (A)</p> <ul style="list-style-type: none"> • About Notifications: 3-24 to 3-28 <p>E18011-01: (A)</p> <ul style="list-style-type: none"> • About the OSM Reporting Interface: 1-1 to 1-6 | <p>status changes. Notification lists are managed and maintained by the Support Order Handling processes.</p> <p><i>As OSM processes customer orders, each order is continuously monitored tracking the order status, the execution of each task, the dependencies between tasks, etc.</i></p> <p><i>OSM provides a comprehensive notification framework. Notifications are used to alert users or systems to processes, orders, or tasks that may be at risk or to events that occur in the system. Notifications can be sent to users or they may trigger an automation plug-in to perform work in an up-stream or down-stream system.</i></p> <p>These processes record, analyze and assess the customer order status changes to provide management reports and any specialized summaries of the efficiency and effectiveness of the overall Order Handling process. These specialized summaries could be specific reports required by specific customers.</p> <p><i>OSM also provides a dedicated reporting interface to allow reports to be generated using standard ad-hoc query and reporting tools. Using the reporting interface, you can generate order overview, order history, pending order/task, process, task and notification reports. The Reporting Interface augments the reports that are available through the OSM Web Client.</i></p> <p><i>Comprehensive sales and service metrics, pre-integrated through ETL's from the Siebel CRM system, provide the relevant metrics for analysing Orders through Oracle's Business Intelligence Enterprise Edition (OBIEE). For further order handling related management information, reports can be generated and OLAP cubes analysed using the SID certified Oracle Communications Data Model (OCDM).</i></p> |

1.1.1.6 – Problem Handling (tabular)

| Business Process Framework Process Element | Software Vendor Mapping | |
|---|--|--|
| 1.1.1.6 Problem Handling | Alignment | Mapping Comment |
| <p>1.1.1.6.3 Track & Manage Customer Problem</p> | <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Service Requests & Trouble Tickets: Page 163 to 166 <p>Siebel Field Service Guide: (A/M)</p> <ul style="list-style-type: none"> • Escalation Times: Page 222 to 224 <p>Siebel Assignment</p> | <p>Brief Description Ensure that recovery activities are assigned, coordinated and tracked efficiently, and that escalation is invoked as required for any open customer problem reports in jeopardy.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The purpose of the Track & Manage Customer Problem processes is to ensure that recovery activities are assigned, coordinated and tracked efficiently.</p> <p><i>Within Oracle's RODOD solution the tracking & management of customer problems is primarily managed through Siebel CRM's TroubleTicket & Service Request capabilities. Siebel Communications Service Requests and Trouble Tickets are used by customer service representatives (CSRs) and their managers, as well as network operations center (NOC) agents. Trouble tickets are typically used to record and track problems with the functioning of services and networks, whereas service requests are typically used to record and track general customer problems and requests. Examples of general problems and requests are billing problems, requests for new equipment, and requests for billing statements.</i></p> <p>and that escalation is invoked as required for any open customer problem reports in jeopardy.</p> <p><i>Escalation times are deadlines that can be added to entitlements to ensure that events are escalated to the appropriate parties at the appropriate intervals. For example, you can automate the following: event escalation; notification of appropriate employees; work routing, assignment, and processing; enforcement of authorization and transition rules. Importantly, escalation warnings are signalled before a contractual commitment has been breached.</i></p> <p>Responsibilities of these processes include, but are not limited to</p> <ul style="list-style-type: none"> • Scheduling, assigning and coordinating tracking any recovery activities, and any repair and restoration activities delegated to other processes; <p><i>The Siebel Assignment Manager is a fully integrated</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|---|
| | <p>Manager Guide: (A)</p> <ul style="list-style-type: none"> • Overview of Siebel Assignment Mgr: Page 23 to 40 • Service Scenario: Page 22 <p>Siebel Field Service Guide: (A/M)</p> <ul style="list-style-type: none"> • Overview of Field Service: Page 27 to 35 <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Parent & Child Trouble Tickets: Page 168 to 169 | <p><i>assignment engine built into Siebel CRM that can be used for automatically assigning appropriate individuals to tasks based on a comprehensive set of criteria (e.g. skills, location, availability, workload, etc.). This engine is used across Sales, Service & Marketing domains.</i></p> <p><i>In the context of Customer Service; Service Requests can often be resolved by the first customer service representative (CSR) who services the customer. However, when the request cannot be resolved, or when the service request is logged through the Internet, ownership must be transferred to a service representative who possesses the expertise to handle the request. This is managed automatically by the Siebel Assignment Manager.</i></p> <p><i>In the event that a Field Service engineer is required to resolve a customer's problem a Service Request will be manually created and managed / scheduled appropriately. For example:</i></p> <ol style="list-style-type: none"> 1. <i>Service request activities are created either manually or semi-automated via activity templates throughout the life cycle of the service request.</i> 2. <i>Automatic verification of the service level agreements for the customer will be performed.</i> 3. <i>Based on the diagnosis of the problem and the service level agreement, manual creation of a return material authorization (RMA) or a service order may be required, and linked to the service request, to allow prompt resolution.</i> 4. <i>Orders can be manually created to ship the replacement parts to the customer or the field engineer.</i> 5. <i>Dispatch activities can be automatically assigned (with manual verification if required) to a field engineer with the right skill set, tools, time, and location.</i> <ul style="list-style-type: none"> • Generating the respective service trouble report creation request(s) to Create Service Trouble Report based on specific customer problem reports; <p><i>Grouping several trouble tickets under one parent can be useful for managing a single network problem that results in calls from many customers. Siebel CRM supports the ability to associate parent and child Trouble Tickets to support this process. If a generic Service Trouble Ticket (or Problem Report) needs to be created to resolve a series of specific Customer Trouble Tickets (or Problem Reports), an end user should create the required Parent Service Trouble Ticket. Once this is created the user should manually select the affected Customer Trouble</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|---|
| | <ul style="list-style-type: none"> Scenario for Service Requests and Trouble Tickets: Page 165 <p>Siebel Field Service Guide: (A/M)</p> <ul style="list-style-type: none"> Service Support: Page 49 to 61 Audit Trail: Page 61 to 62 <p>Siebel Field Service Guide: (A/M)</p> <ul style="list-style-type: none"> Field Service Activities: Page 69 to 73 <ul style="list-style-type: none"> Activity Templates: Page 71 | <p><i>Tickets from the Trouble Ticket list view and associate these with the newly created Service Trouble Tickets.</i></p> <p><i>Once this parent/child relationship is established between the Parent Service Trouble Ticket and the Child Customer Trouble Tickets, when the Service Trouble Ticket is resolved, this resolution can cascade down to the related Customer Trouble Tickets. An example scenario covering this process is provided in the documented reference.</i></p> <ul style="list-style-type: none"> Undertake necessary tracking of the execution progress; <p><i>When a Trouble Ticket or Service Request is created against a customer's account all activities connected with the issue are recorded, i.e. the CSP's entire response across activities, orders, parts movement, assignments, etc.</i></p> <p><i>Siebel CRM also provides a fully automated audit trail capability to track the history of the changes that have been made to service requests. An audit trail is a record showing which operation was performed, when it was performed, and how the value was changed.</i></p> <ul style="list-style-type: none"> Modifying information in an existing customer problem report based on assignments; <p><i>When working with Trouble Tickets and Service Orders, Activities can be used to assign and manage tasks associated with resolving the customer's issue. For example, if a task requires multiple steps that one or more people might carry out, activities greatly simplify the job. Activities can help:</i></p> <ul style="list-style-type: none"> Define and assign the task Provide information to complete the task Track the progress of the task Track costs and bill for the task <p><i>Activities can be manually added to a Trouble Ticket or Service Request, or Activity Templates can be used to automatically generate the Activities (or Activity Plans) required to resolve a problem based on pre-defined templates. This will drive the activities required to resolve the Trouble Ticket or Service Request associated with the Activities, updates to the TT or SR will be made manually by the user as they work through their assigned activities.</i></p> <ul style="list-style-type: none"> Modifying the customer problem report status; Canceling a customer problem report when the specific problem was related to an incorrect |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|--|
| | <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Closing a Trouble Ticket: Page 172 <p>Siebel Field Service Guide: (A)</p> <ul style="list-style-type: none"> • Verifying Entitlements: Page 219 to 223 <p>Siebel PRM Guide: (A/M):</p> <ul style="list-style-type: none"> • Page 219 to 225 | <p>customer problem report; and</p> <p><i>These manual modifications and update requirements are supported through standard Trouble Ticket and Service Order management.</i></p> <ul style="list-style-type: none"> • Monitoring the jeopardy status of open customer problem reports, and escalating customer problem reports as necessary. <p><i>Entitlements in Siebel CRM can be defined to automatically determine the level of service a customer is entitled to receive (e.g. for what products and services, response time, restore time, etc.). Escalation times are deadlines that can be manually added to entitlements when they are defined for a customer to ensure that events are automatically escalated to the appropriate parties at the appropriate intervals when the entitlements are associated with an active Service Order. For example, you can automate the following: event escalation; notification of appropriate employees; work routing, assignment, and processing; enforcement of authorization and transition rules. Importantly, escalation warnings are signalled before a contractual commitment has been breached.</i></p> <p>Note that some specific product and/or service components may be owned and managed by suppliers/partners. In these cases the Track & Manage Customer Problem process is responsible for initiating requests...</p> <p><i>The Siebel Partner Relationship Management (PRM) module automates and streamlines the relationship between CSPs and their channel and alliance partners, distributors, resellers, agents, brokers, or dealers. You can use Siebel PRM to manage two types of service requests:</i></p> <ul style="list-style-type: none"> • <i>Customer Service Requests: Customers will sometimes log service requests that your partners are either solely or partly responsible for. You can refer customer service requests to partners, work on them collaboratively with partners, or track service requests that partners have logged on behalf of your customers.</i> • <i>Partner Service Requests: Partners will sometimes log service requests that you must respond to. For example, partners may have questions about your products or about the partnership, or they may need other forms of service.</i> <p><i>Service Requests can be manually assigned to Partners but it is generally better to use Siebel</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|---|---|--|
| | <p>Siebel Comms Guide: (M)</p> <ul style="list-style-type: none"> • Closing a Trouble Ticket: Page 172 | <p><i>Assignment Manager to automatically assign the service request by creating rules based on geography, partners' skills, expertise in a specific product, language ability, territory, workload and availability, or other criteria.</i></p> <p>...through S/P Problem Reporting & Management processes for restoration and recovery by the supplier/partner of the specific service components</p> <p>See Note 3.</p> <p>These processes will co-ordinate all the actions necessary in order to guarantee that all tasks are finished at the appropriate time and in the appropriate sequence.</p> <p><i>As described above, Trouble Tickets and Service Orders co-ordinate all the actions required to be completed (and their sequence) through Activities, and Entitlements drive automated workflows to ensure all tasks are completed in a timely manner to avoid breaches in agreed SLA's.</i></p> <p>The Track & Manage Customer Problem processes will also inform the Close Customer Problem processes by modifying the customer problem report status to cleared when the customer problem has been resolved.</p> <p><i>Once all Activities associated with a Customer Problem Report (Trouble Ticket or Service Request) have been completed then the 'Close Customer Problem' processes can close the corresponding Problem Report.</i></p> |
| <p>1.1.1.6.2 Report Customer Problem</p> | | <p>Brief Description</p> <p>Monitor the status of customer problem reports, provide notifications of any changes and provide management reports.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description</p> <p>The objective of the Report Customer Problem processes is to monitor the status of customer problem reports, provide notifications of any changes and provide management reports.</p> <p>These processes are responsible for continuously monitoring the status of customer problem reports and managing notifications to processes and other parties registered to receive notifications of any status changes.</p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|--|
| | <p>Siebel Field Service Guide: (A/M)</p> <ul style="list-style-type: none"> • Verifying Entitlements: Page 219 to 223 <p>Siebel Apps Admin Guide: (A/M)</p> <ul style="list-style-type: none"> • Using the Inbox: Page 125 to 127 <p>Service Analytics Product Guide: (A/M)</p> <ul style="list-style-type: none"> • Service Analytics & Dashboards: Page 12 to 25 <p>(No download available)</p> <ul style="list-style-type: none"> • Oracle Answers: Page 7 to 11 | <p><i>As discussed in response to '1.1.1.6.3 Track & Manage Customer Problem', Escalation times are deadlines that can be manually added to entitlements when they are defined for a customer to ensure that events are automatically escalated to the appropriate parties at the appropriate intervals when the entitlements are associated with an active Service Order. For example, you can automate the following: event escalation; notification of appropriate employees; work routing, assignment, and processing; enforcement of authorization and transition rules.</i></p> <p><i>Notification of status changes, escalations, approvals, etc. to individuals can be managed through a users Inbox. A users Inbox is a single screen that shows all approval and notification items assigned to them regardless of the screen where the item originated. Enough detailed information about the item so that they can act on the item from the Inbox and not need to navigate to other screens for more information.</i></p> <p>Notification lists are managed and maintained by the Support Problem Handling processes.</p> <p>See Note 3.</p> <p>These processes record, analyze and assess the customer problem report status changes to provide management reports and any specialized summaries of the efficiency and effectiveness of the overall Problem Handling process.</p> <p><i>Oracle Service Analytics provides a series of Dashboards, Reports & Metrics that provide comprehensive insight into the entire Problem Handling process. Pages 12 to 25 in the referenced documentation provides details on contents and typical usage of the Management Dashboards provided as standard, and there are many more examples of service related Executive Reports that are also provided in the subsequent pages in the documentation.</i></p> <p>These specialized summaries could be creation of specific reports required by customers and/or other specific audiences.</p> <p><i>For specialised and ad-hoc Queries, Reports and Dashboards, Oracle Answers (provided as part of Service Analytics) allows end-users to use all pre-build metrics and dimensional attributes to build their own tailored summaries required by customers and other specific audiences.</i></p> <p>These processes will make the necessary reports</p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|---|--|--|
| | <ul style="list-style-type: none"> • Oracle Answers: Page 7 to 11 | <p>about the problem that occurred, the root cause and the activities carried out for recovery of normal operation.</p> <p><i>In this case this process would be supported by an end user using Service Analytics and Oracle Answers to build the necessary report(s) to provide the specific analysis required.</i></p> |
| <p>1.1.1.6.4 Close Customer Problem Report</p> | <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Resolving & Closing Trouble Tickets: Page 171 to 172 • Customer Satisfaction Survey: Page 172 to 173 | <p>Brief Description Ensure that a problem affecting the customer is solved</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The purpose of the Close Customer Problem Report processes is to close a customer problem report when the problem affecting the customer is solved.</p> <p><i>Resolving a trouble ticket may require several manual procedures, performed by more than one person or group. End users can create an activity for each step and assign the activity to themselves, another qualified person, or a group.</i></p> <p><i>Activity plans consist of a list of activities to be completed to resolve a problem. If an appropriate activity template exists, end users can select the template to populate their activities list with a defined set of activities. Then end users can customize the list, if necessary.</i></p> <p><i>Once all Activities associated with a Customer Problem Report (Trouble Ticket or Service Request) have been completed then the corresponding Problem Report can be manually closed. Once closed further changes cannot be made unless it is re-opened.</i></p> <p>These processes are also responsible for possibly contacting the customer to inquire about the customer's satisfaction with resolution of the problem.</p> <p><i>As part of closing a trouble ticket, end users can conduct a customer survey in person, or they can use the Correspondence screen to send a letter and survey to the originator of a trouble ticket. When they mail a survey, an activity is automatically generated for the mailing.</i></p> <p>These processes monitor the status of all open customer problem reports and recognize that a customer problem report is ready to be closed when the status is changed to cleared.</p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|--|--|
| | | <p>See the above reference to closing Trouble Tickets. When a service request or trouble ticket is broken down into different activities, the agent can monitor progress towards completion of the activities and close the service request or trouble ticket once all activities are completed/cleared.</p> |
| <p>1.1.1.6.5 Create Customer Problem Report</p> | <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Service Requests & Trouble Tickets: Page 164 <p>Siebel Comms Guide: (A/M)</p> <ul style="list-style-type: none"> • Service Requests | <p>Brief Description This process creates a new Customer Problem Report.</p> <p><i>Covered within the body of the Extended Description.</i></p> <p>Extended Description The objective of the Create Customer Problem Report process is to create a new customer problem report.</p> <p>A new customer problem report may be created as a result of customer contacts indicating a problem with their purchased product offerings</p> <p><i>Depending on the type of problem being reported by a customer, the appropriate service related problem report will be initiated within Siebel CRM; i.e. a Trouble Ticket for tracking problems with the functioning of services and networks, or a Service Request where Field Service assistance is required for resolving the customer's problem. Service requests and trouble tickets can be created within Siebel by:</i></p> <ul style="list-style-type: none"> • Customers using Self-Service e.g. Siebel E-Support (Automatic) • Customers using an Automated Call Distributor (ACD) and/or IVR (Semi-Automatic) • Call Centre agents responding to customer phone calls (Manual) • Call center agents responding to customer email from customers (Semi-Automatic) <p><i>Creating a customer problem report from a customer email is streamlined through the use of Siebel Email Response. When customers send with details of a problem, Siebel Email Response automatically routes the email to the correctly skilled agents, allowing them to respond and react immediately.</i></p> <p>or, at the request of analysis undertaken by other processes in the CRM or SM&O horizontal process layers, which detect a failure or degradation which may be impacting customers.</p> <p><i>Other process layers may initiate the creation of Trouble-Tickets, for example when service failures or service degradation is detected. Specific supported</i></p> |

| Business Process Framework Process Element | Software Vendor Mapping | |
|--|---|--|
| | <p data-bbox="523 264 735 322">& Trouble Tickets: Page 164</p> <p data-bbox="501 544 715 573">SWITroubleTicket</p> <p data-bbox="501 824 663 882">Siebel Comms Guide: (A/M)</p> <ul data-bbox="501 889 735 1010" style="list-style-type: none"> • Scenario for Service Requests & Trouble Tickets: Page 165 to 166 | <p data-bbox="767 264 967 293"><i>examples include:</i></p> <ul data-bbox="767 327 1358 517" style="list-style-type: none"> • <i>NOC agents responding to network problems create a Trouble-Ticket (Manual)</i> • <i>A network communications management system that is integrated with Siebel Communications to automatically create a Trouble-Ticket (Automatic)</i> <p data-bbox="767 551 1315 669"><i>The automatic creation of Trouble-Tickets by external systems such as a network management system is enabled through the published 'SWITroubleTicket' Siebel web service.</i></p> <p data-bbox="767 703 1353 792">These processes are responsible for capturing all the necessary customer information to be included in the new Customer Problem Report.</p> <p data-bbox="767 831 1358 1106"><i>As described in the documented scenario for Service Requests & Trouble Tickets, Siebel provides extensive support for capturing all the necessary customer information when logging a customer problem report. Much of the data collection will be manual, but workflows are provided where appropriate that helps to automate Service Request & Trouble Ticket management (e.g. auto creation and auto assignment of TT's & SR's).</i></p> |

Assessment Notes

Generic notes that have been referenced within the assessment document have been provided here:

Note 1: *This part of the Business Process Framework process description does not represent a direct process requirement, however this text has been provided as further information to contextualise the overall support for the level 3 process in question.*

Note 2: *This part of the Business Process Framework process description refers to another L3 process area so is not part of the scope of this specific L3 process. This text has been provided as further explanation regarding how this maps to the related L3 process area.*

Note 3: *This part of the Business Process Framework process description refers to another Business Process Framework process that is not covered by the scope of this certification.*

Documentation / Asset Inventory

The table below details all of the documentation provided as part of this certification and a URL of where the documentation can be downloaded from if it is available on the public internet.

| Documentation Description | Download location |
|---|--|
| RODOD Whitepaper | http://www.oracle.com/us/industries/communications/rapid-offer-design-order-wp-077276.pdf |
| Oracle Product Hub for Communications Whitepaper | No download available on the public internet. Available to customers & partners at: https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&doctype=WHITE PAPER&id=1086492.1 |
| E13109-07 Oracle Product Information Management User Guide | No download available |
| E13108-08 Oracle Product Information Management Implementation Guide | http://download.oracle.com/docs/cd/B53825_07/current/acrobat/121pimig.pdf |
| B31990-04 Oracle Product Lifecycle Management User Guide | http://download.oracle.com/docs/cd/B40089_10/current/acrobat/120plmug.pdf |
| B31989-01 Oracle Product Lifecycle Management Implementation Guide | http://download.oracle.com/docs/cd/B34956_01/current/acrobat/120plmig.pdf |
| E13623-05 Oracle Project Management User Guide | http://download.oracle.com/docs/cd/B53825_07/current/acrobat/121pjtag.pdf |
| E17549-01 Oracle Product Master Data Management Integration 2.5 Implementation Guide | http://download.oracle.com/docs/cd/E20059_01/doc.250/e17549.pdf |
| E17427-01 Oracle Order to Activate Integration Pack for Siebel CRM and OSM 2.5 Implementation Guide | http://download.oracle.com/docs/cd/E20059_01/doc.250/e17427.pdf |
| Siebel Pricing Administration Guide Version 8.1 | http://download.oracle.com/docs/cd/E14004_01/books/PDF/PriceAdm.pdf |
| Siebel Product Administration Guide Version 8.1 | http://download.oracle.com/docs/cd/E14004_01/books/PDF/ProdAdm.pdf |
| Siebel Order Management Guide Version 8.1 | http://download.oracle.com/docs/cd/E14004_01/books/PDF/OrdMgt.pdf |
| Siebel Marketing User Guide Version 8.1 | http://download.oracle.com/docs/cd/E14004_01/books/PDF/MKTG User.pdf |
| OBIEE Metrics - Oracle Business Intelligence Applications 7.9.6 Metric Reference Guide | No download available |
| E15886-03 Oracle Communications Data Model | http://download.oracle.com/docs/cd/E16762_01/doc/doc.112/e15886.pdf |
| Siebel Communications Guide Version 8.1 | http://download.oracle.com/docs/cd/E14004_01/books/PDF/CommSIA.pdf |
| Siebel Order Management Guide for Communications | http://download.oracle.com/docs/cd/E14004_01/books/PDF/OrdMgtSIA.pdf |
| Siebel Applications Administration Guide Version 8.1 | http://download.oracle.com/docs/cd/E14004_01/books/PDF/AppsAdmin.pdf |
| E12185-01 Oracle Real-Time Decisions for Siebel Intelligent | http://download.oracle.com/docs/cd/E12181_01/doc/rtdd.221/e12185.pdf |

| Documentation Description | Download location |
|---|---|
| Offer Generation Installation and Reference Guide | |
| E15769-01 Siebel CRM Integration Pack for Oracle Order Management- Order to Cash 2.5 - Implementation Guide | http://download.oracle.com/docs/cd/E20059_01/doc.250/e15769.pdf |
| E18012-01 Oracle Communications Order and Service Management Task Web Client User's Guide | No download available |
| E18007-01 Oracle Communications Order and Service Management Concepts | No download available |
| E18011-01 Oracle Communications Order and Service Management Reporting Interface Guide | No download available |
| Siebel Assignment Manager Administration Guide Version 8.1 | http://download.oracle.com/docs/cd/E14004_01/books/PDF/AssignMgrAdm.pdf |
| Siebel Field Service Guide Version 8.1 | http://download.oracle.com/docs/cd/E14004_01/books/PDF/FieldServ.pdf |
| Partner Relationship Management Administration Guide Version 8.1 | http://download.oracle.com/docs/cd/E14004_01/books/PDF/PRMAdm.pdf |
| Service Analytics Product Guide | No download available |

Process Conformance

Note that many of the assessed areas of process support involve a significant component of manual activity. Where this arises, the role of the assessed solution is to facilitate the human operator in delivering overall support for the process concerned. The nature and extent of the automated vs manual activity varies for different process areas and details on this for each case are presented in the separate Business Process Framework Alignment table included above.

The conformance results below should therefore be read in this context, and should be interpreted by reference to the detailed mapping comments provided in that Framework Alignment table.

| Assessed Business Process Framework Conformance - ORACLE RODOD | | | |
|--|-----------------|---|---|
| Business Process Framework Process Element | Assessed Domain | Conformance Level | Comment |
| <i>Within Level 1:</i> 1.2.1 – Marketing & Offer Management | Product/Market | <i>Not Applicable for Level 1 process</i> | TM Forum does not assess process Level 1 elements hence Conformance Level is not awarded at this level. |
| <i>Within Level 2:</i> 1.2.1.5 – Product & Offer Development & Retirement | Product/Market | Scope Partially Conformant (2) | Partially Conformant due to subset of contained Level 3 processes not presented in scope for this assessment. Conformance marked here is relevant for 6 contained L3 process elements (see entries below). These represent a subset covering 6 out of 8 L3 process elements contained in 1.2.1.5 Product & Offer Development & Retirement |
| 1.2.1.5.2 – Assess Performance of Existing Products | Product/Market | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.2.1.5.4 – Develop Product Commercialization Strategy | Product/Market | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.2.1.5.5 – Develop Detailed Product Specifications | Product/Market | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.2.1.5.6 – Manage Product Development | Product/Market | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.2.1.5.7 – Launch New Products | Product/Market | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the |

Assessed Business Process Framework Conformance – ORACLE RODOD

| Business Process Framework Process Element | Assessed Domain | Conformance Level | Comment |
|--|------------------------|---|--|
| | | | support provided |
| 1.2.1.5.8 – Manage Product Exit | Product/Market | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| <i>Within Level 1:</i> 1.1.1 – Customer Relationship Management | Customer | <i>Not Applicable for Level 1 process</i> | TM Forum does not assess process Level 1 elements hence Conformance Level is not awarded at this level. |
| <i>Within Level 2:</i> 1.1.1.2 – Customer Interface Management | Customer | Scope Partially Conformant (2) | Partially Conformant due to subset of contained Level 3 processes not presented in scope for this assessment. Conformance marked here is relevant for 3 contained L3 process elements (see entries below). These represent a subset covering 3 out of 4 L3 process elements contained in 1.1.1.2 Customer Interface Management |
| 1.1.1.2.1 – Manage Contact | Customer | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.1.1.2.2 – Manage Request (Including Self Service) | Customer | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.1.1.2.4 – Mediate & Orchestrate Customer Interactions | Customer | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| <i>Within Level 2:</i> 1.1.1.4 – Selling | Customer | Scope Partially Conformant (2) | Partially Conformant due to subset of contained Level 3 processes not presented in scope for this assessment. Conformance marked here is relevant for 4 contained L3 process elements (see entries below). These represent a subset covering 4 out of 7 L3 process elements contained in 1.1.1.4 Selling |
| 1.1.1.4.4 – Acquire Customer Data | Customer | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |

Assessed Business Process Framework Conformance – ORACLE RODOD

| Business Process Framework Process Element | Assessed Domain | Conformance Level | Comment |
|--|------------------------|----------------------------|--|
| 1.1.1.4.3 – Negotiate Sales Contract | Customer | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.1.1.4.5 – Cross/Up Selling | Customer | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.1.1.4.7 – Manage Sales Accounts | Customer | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| <i>Within Level 2:</i> 1.1.1.5 – Order Handling | Customer | Scope Fully Conformant (3) | Fully conformant. Conformance marked here is relevant for all 7 contained L3 process elements (see entries below). These represent the full set of 7 L3 process elements contained in 1.1.1.5 Order Handling |
| 1.1.1.5.1 – Determine Customer Order Feasibility | Customer | Scope Fully Conformant (5) | Fully conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.1.1.5.2 – Authorize Credit | Customer | Scope Fully Conformant (5) | Fully Conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.1.1.5.4 – Track & Manage Customer Order Handling | Customer | Scope Fully Conformant (5) | Fully Conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.1.1.5.5 – Complete Customer Order | Customer | Scope Fully Conformant (5) | Fully Conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.1.1.5.6 – Issue Customer Orders | Customer | Scope Fully Conformant (5) | Fully Conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.1.1.5.7 – Report Customer Order Handling | Customer | Scope Fully Conformant (5) | Fully Conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.1.1.5.8 – Close Customer Order | Customer | Scope Fully Conformant | Fully Conformant. See references/comments in the |

Assessed Business Process Framework Conformance – ORACLE RODOD

| Business Process Framework Process Element | Assessed Domain | Conformance Level | Comment |
|--|------------------------|-----------------------------------|---|
| | | (5) | separate Framework Alignment table for detail on the support provided |
| <i>Within Level 2:</i> 1.1.1.6 – Problem Handling | Customer | Scope Partially Conformant (2) | Partially Conformant due to subset of contained Level 3 processes not presented in scope for this assessment. Conformance marked here is relevant for 4 contained L3 process elements (see entries below). These represent a subset covering 4 out of 6 L3 process elements contained in 1.1.1.6 Problem Handling |
| 1.1.1.6.2 – Report Customer Problem | Customer | Scope Fully Conformant (5) | Fully Conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.1.1.6.3 – Track & Manage Customer Problem | Customer | Scope Fully Conformant (5) | Fully Conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.1.1.6.4 – Close Customer Problem Report | Customer | Scope Fully Conformant (5) | Fully Conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |
| 1.1.1.6.5 – Create Customer Problem Report | Customer | Scope Fully Conformant (5) | Fully Conformant. See references/comments in the separate Framework Alignment table for detail on the support provided |