

PeopleSoft Proposal Management



When selling products, you use customer management systems to track customer pipeline, product packages, and costs. Adding services into the negotiation often creates complexity due to manual estimation and inconsistent service offerings. By integrating your process of prioritizing, estimating, and engaging services, your organization gets the information you need to respond to customer demands. PeopleSoft Proposal Management allows you to prioritize opportunities and estimate costs and scope to maximize your services organization's profits.

KEY BENEFITS

- Gain visibility into your services pipeline
- Boost project profitability with accurate estimates
- Increase project execution efficiency

Integration Increases Visibility into Pipeline

By using the power of PeopleSoft Proposal Management with Oracle's PeopleSoft Sales application, service organizations can track opportunities from the earliest stages of lead development through scope and cost estimation to final contract negotiation. Seamless product and service integration means that you gain better visibility into the pipeline:

- Combine goods and services quotes to simplify multiple sales negotiations.
- Incorporate estimated services costs into an integrated quote for more accurate information.
- Respond to negotiations accurately with data from across your organization.
- Automatically move an accepted quote to resource and execution phase.

Planning and Estimating Boosts Profitability

An integral part of managing a proposal for services is accurately estimating and planning costs, resources, timeline, and scope. Underestimated quotes lead to unpaid customer bills. Overestimates skew bottom-line expectations. When you're able to plan and estimate with accuracy and confidence, you increase profits while keeping customers satisfied. You can:

- Create proposals that outline activities, timelines, resource needs, cost amounts, bill amounts, and margin percentages.
- Track changes to scope, cost, and timelines in the proposal during negotiations until the deal is signed.
- Record multiple versions of proposals so that adjustments can be made and different options presented.
- Improve project planning and estimating capabilities to include other types of resources such as assets, material, and facilities.
- Automatically create a project resource list with the various types of resources estimated on the proposal, appropriate bill rates, and a project budget that is spread

PEOPLESOFT ENTERPRISE SERVICE AUTOMATION SOLUTIONS

PeopleSoft Proposal Management is part of the PeopleSoft Enterprise Service Automation suite (ESA), an integrated family of project management applications. These products provide a complete solution to help you invest in the right portfolio of projects, standardize project delivery, and optimize your project resources.

across time periods.

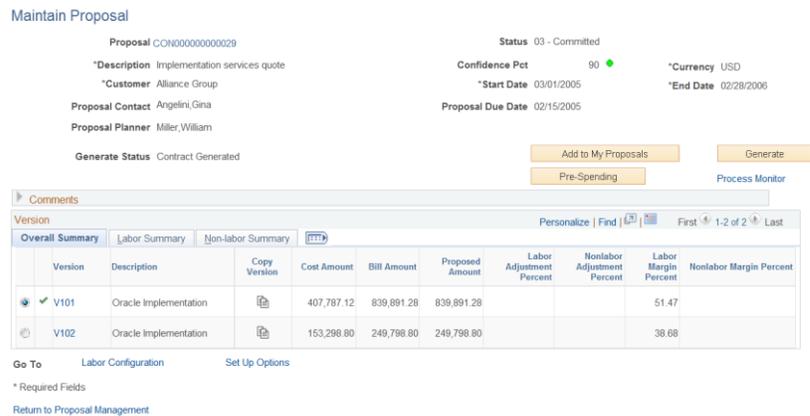


Figure 1. Track confidence in your pipeline, manage multiple versions of proposals, and plan detail cost and staff estimates with accuracy.

Automated Transition to Execution Increases Efficiency

Once your customer accepts a proposal, it is critical that you are able to move quickly from sales mode to execution mode. PeopleSoft Proposal Management leverages your proposal to automatically generate resource requests for labor, create a live project, and generate a contract for billing and revenue recognition.

It is imperative that you have visibility into the opportunity pipeline for service work so that you can plan for future demand of labor resources and forecast revenue. Will you have the right people with the right skills available to execute on the proposals you are likely to win? PeopleSoft Proposal Management helps you:

- Identify resource requirements so that you can plan for resource needs as the proposal moves to a higher degree of confidence.
- Gain insight into the skill base to know if you need to start hiring or training.
- Reserve resources so that if a proposal is won, resources will staff that project.
- Forecast services revenue with real-time contract information.

It is critical that you are able to leverage the work that went into the original proposal when it comes time to create a contract and project for a customer so that you can eliminate redundant data entry, increase accuracy, and reduce billing discrepancies. You'll be able to:

- Create project plans in PeopleSoft Project Costing with project activities, timelines, resource requirements, and a project team.
- Convert cost, revenue, and billing terms, resource cost and bill rates, and proposal timelines into PeopleSoft Contracts.



CONTACT US

For more information about [insert product name], visit oracle.com/partners or call +1.800.ORACLE1 to speak to an Oracle representative.

CONNECT WITH US

-  blogs.oracle.com/oraclepartners
-  facebook.com/oraclepartners
-  twitter.com/oraclepartners
-  oracle.com/partners

Hardware and Software, Engineered to Work Together

Copyright © 2015, Oracle and/or its affiliates. All rights reserved. This document is provided for information purposes only, and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document, and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group. 0215

