

Siebel Sales Applications

Maximize Revenue Growth by Knowing Your Customers
Siebel Sales Applications

DESIGNED TO WORK

Siebel Sales provides complete sales pipeline management. All applications in this suite address a specific part of the sales process and are designed to work together to improve overall sales efficiency and cost-effectiveness.

After years of cutting costs and downsizing, CEOs are finally putting growth back on the corporate agenda—and setting extremely aggressive revenue goals in the process. To reach their ambitious target numbers, sales professionals require state-of-the-art tools that help them develop accurate forecasts, share information seamlessly between geographically dispersed teams, generate customized customer quotes, and close more deals more quickly.

Oracle's Siebel Sales enables your sales organization to do all these things and more. A mature software suite that has been on the market for more than a decade, Siebel Sales is available in 20 languages and is used by more than 3,000 enterprises in 18 industries worldwide. By offering different deployment options, Oracle provides a substantially more flexible solution than any other sales automation vendor, delivering tangible business value while maximizing your return on investment.

Gain Insight into Sales Activities

Sales organizations are under increased pressure - from both internal and external forces - to improve effectiveness while containing costs. Internally, directives from high up in the organization require your sales team to achieve higher conversion rates and generate more revenue more quickly than ever before. Your sales team also faces considerable external challenges. The traditional sales cycle is quickly vanishing, as brand loyalty erodes, regulations multiply, consumer expectations increase, and alternative channels proliferate. Your team must have up-to-the-minute knowledge of everything happening in the pipeline to succeed in today's much more fluid and complex sales environment.

Even though your organization undoubtedly collects large amounts of data on virtually all aspects of the sales process, this data is most likely scattered among multiple, disparate applications - both legacy and personal-productivity. You struggle to consolidate the data and make sense of it.

With Siebel Sales, you can replace all these standalone systems with a single software suite that provides you with an integrated view of all your sales activities. This enables you to measure the effectiveness of your spending and streamline sales processes, boosting the productivity of individual sales professionals while increasing the effectiveness of your sales organization as a whole.

MAXIMIZE SALES EFFECTIVENESS

To become best-in-class, a sales organization must have a sales automation solution that increases sales effectiveness by addressing these key issues:

- Pipeline visibility
- Sales analytics
- Best practices

Benefit from Next-Generation Software Today

Sales force automation applications must continually evolve to meet the increasing demands of sales professionals. Although first-generation solutions were a clear improvement over manual processes, these basic solutions have been outpaced by the fast-moving demands of an increasingly complex competitive climate.

In response to market demands and customer feedback, Siebel Sales next-generation functionality addresses five key areas:

- **Sales effectiveness.** Siebel Sales enables individual salespeople to segment their territories, prioritize actions, and collaborate with other team members, using proven best practices.
- **Management effectiveness.** By identifying and diagnosing problems, Siebel Sales allows you to deliver effective coaching that's tailored to the needs of each salesperson.
- **Customer relationship effectiveness.** Your organization needs a 360-degree view of all customer interactions. Siebel Sales makes this information easily accessible to all stakeholders, allowing them to anticipate customer needs, improve responsiveness, enhance customer satisfaction, and increase loyalty.
- **Enterprise alignment.** Siebel Sales helps your sales organization collaborate with other organizations—such as marketing, product development, inventory management, and financial planning—that are performing critical corporate functions in your enterprise.
- **Business insight.** Siebel Sales gives you access to the right information in a timely manner. From the real-time comprehensive view of your entire sales organization, you can execute tactical and strategic decisions that immediately influence your bottom line.

Move Beyond Automation to Actionable Insight

Improving sales effectiveness involves much more than simply automating the discrete tasks that sales professionals perform. You need timely access to comprehensive, accurate information that lets you know what is happening at every step of the sales process. Siebel Sales gives you this comprehensive view, helping you do everything from qualifying prospects to developing customer proposals, delivering successful presentations, tracking opportunities through the pipeline, and providing stellar after-sales support.

- **Visibility into the sales pipeline.** Complete visibility into the sales pipeline lets your sales team allocate resources more effectively, systematically diagnose any problems, and proactively resolve issues. Siebel Sales lets you see the actual opportunities the sales force is pursuing and helps you manage those opportunities.
- **Access to sophisticated sales analytics.** To close more business, the entire sales organization - from senior management to individual salespeople—must have access to up-to-the-minute intelligence regarding pipeline trends, product demand, competitive trends, and the overall performance of the sales network. Siebel Sales enables your sales executives to track the overall health of the business by providing them with access to key performance metrics that monitor whether your organization is on track to satisfy strategic objectives.
- **Support for best practices.** Sales organizations need to follow best practices that maximize sales effectiveness and ensure consistent execution across all sales channels. This means implementing sales automation tools that support leading sales methodologies such as Enterprise Selling Process (ESP), Target Account Selling

(TAS), and Portfolio Management Process (PMP). By driving common, consistent processes that focus your efforts on achieving revenue targets, Siebel Sales helps you leverage resources develop strategic accounts and protect established accounts against competitors.

Get a Competitive Advantage with Siebel Sales

Designed to help globally dispersed field sales organizations focus on the right deals at the right time, Siebel Sales applications have been proven to grow revenues quickly and profitably.

Siebel Sales includes the following key applications:

TRIANGULATED FORECASTING

To maximize forecasting accuracy, organizations should assess forecasts from three perspectives.

- The field perspective, or “field assessment,” is based on a rollup of individual forecasts that provides you with a bottom-up view of current market conditions
- The pipeline perspective, or “pipeline assessment,” is generated by analysis opportunities at each stage of the pipeline, enabling you to assess sales targets from an aggregate, top-down perspective
- The historical perspective, or “analytical assessment,” is based on a comparison of current pipeline data with historical trends, helping your company apply knowledge gained from prior periods to current sales activities

- **Siebel Opportunity Management.** Gives you a complete picture of each opportunity, including history, key decision-makers associated with it, and all milestones. This application also tracks the source of each lead, the actions of other vendors competing for the business, and the customer’s key decision criteria. By consolidating all information about a particular opportunity in one place, Siebel Opportunity Management brings new team members up to speed quickly and easily.
- **Siebel Sales Forecasting.** Provides real-time graphical analysis and reporting along with snapshots of forecasting information over time. It eliminates the time-consuming and cumbersome manual processes formerly required to create forecasts, helping sales organizations of all sizes and types monitor the health of their business, accurately assess upcoming opportunities, and better meet sales goals—all in real time. Siebel Sales Forecasting helps your team proactively manage revenues by account, opportunity, product line, project, partner, division, organization, or employee. It also lets you conduct comprehensive matrix organization forecasting and sales team revenue allocation. With Siebel Sales Forecasting, your organization can manage recurring revenues and multiple currencies, and can complete robust currency conversions instantaneously.
- **Siebel Contact Management.** Ensures sales effectiveness by giving your sales team immediate access to a comprehensive view of every customer. Siebel Contact Management provides salespeople with a complete history of all customer interactions, including all inbound and outbound calls, e-mail exchanges, written correspondence, site visits, meetings, and product demos.
- **Siebel Activity Management.** Helps you schedule items on your to-do list, develop activity plans, manage the completion of complex tasks, and delegate tasks to others. Additionally, Siebel Activity Management enables you to synchronize activity, contact, and calendar information with popular personal information managers such as Microsoft Outlook, IBM Lotus Notes, and applications running on Palm OS devices.
- **Siebel Account Management.** Enables you to build deep and satisfactory relationships with key accounts by providing a comprehensive history of all interactions your sales team or partner organizations have with customers. Siebel Account Management also helps you enhance long-term “replenishment-oriented” sales processes such as those in the chemicals, communications, consumer goods, energy, and financial services industries.
- **Siebel Quotes.** Helps you develop, verify, revise, and submit quotes tailored to customer requirements. By using detailed information from Siebel Opportunity Management, Siebel Quotes helps you automatically generate quotes, verify that they are complete and accurate, and identify opportunities for up-selling and cross-selling. You can print quotes in a variety of formats and use e-mail to send them to customers over the internet. Siebel Quotes enables you to price products immediately and accurately from multiple price lists and in multiple currencies, taking into account volume discounts and complex pricing rules.
- **Siebel Pricer.** Lets you set consistent pricing across the organization, easing the

SIEBEL SERVER SYNC FOR MS EXCHANGE SERVER

- Integration with Microsoft Outlook and Exchange overcomes the challenge of making your CRM system transparent
- Interactions with Siebel CRM applications occur as part of your users' daily tasks
- A server-based synchronization engine synchronizes calendar appointments, contacts, employees, and tasks
- Access to Microsoft Outlook Calendar is provided from within Siebel Sales
- A Microsoft Outlook add-in enables users to link Outlook contacts, tasks, and appointments to Siebel Sales data, such as opportunities and service requests

SIEBEL PORTFOLIO MANAGEMENT PROCESS

KEY BENEFITS

The Portfolio Management Process (PMP) is a structured methodology that enables sales professionals to assess their customer accounts and apply the right strategies to each one. Siebel PMP

- Provides a clear view of a portfolio's revenue potential
- Helps create a plan to prioritize investments and returns for strategic customers
- Creates a standard process for managing account portfolios that can be consistently applied across your sales organization
- Improves collaboration among the members of the "virtual" sales team \
- Uses partner capabilities and resources across portfolios

burden and expense of manual price management while increasing corporate agility and enhancing customer satisfaction. By developing, managing, and deploying complex pricing rules, Siebel Pricer helps you implement specialized pricing by product, account, promotion, or other pricing criteria, ensuring easy adoption of new pricing models and quick responses to changing market conditions.

- **Siebel Configurator.** Enables you to enforce business rules while delivering context-based messages that facilitate up-selling and cross-selling. To provide the ideal solution for each customer at the optimal price, your sales team needs a comprehensive tool that ensures the accuracy, completeness, and validity of complex orders. By using Siebel Configurator internally, your sales team can improve productivity and order accuracy; by implementing it for external use on your company's Web site, you can easily guide buyers through self-service product customization.
- **Siebel Proposals and Siebel Presentations.** Builds high-quality sales proposals and presentations tailored to customer requirements. Your ability to close sales often depends on creating customized proposals and making effective presentations to customers. Proposals created with Siebel Proposals can be viewed in Microsoft Word, IBM Lotus WordPro, or on a standard Web browser; presentations built with Siebel Presentations can be delivered in Microsoft PowerPoint or IBM Lotus Notes Freelance Graphics.
- **Siebel Assignment Manager.** Automatically routes opportunities, accounts, contacts, and activities to precisely the right sales team members—company employees as well as channel or business partners—based on flexible and configurable business rules.
- **Siebel Territory Manager.** Helps you keep your salespeople appropriately aligned with their respective territories. Because maintaining your sales force is a major cost for your organization, you want to make sure that your representatives are working efficiently and not competing with each other for customer accounts.
- **Siebel Target Account Selling (TAS).** The Target Account Selling sales methodology is an opportunity-based set of processes that helps sales professionals assess their opportunities, conduct organizational and competitive analyses, and develop and execute effective sales strategies. This structured and repeatable sales methodology enables the sales organization to build successful relationships with customers while shortening selling cycles and increasing sales revenue per employee. Siebel TAS quickly and easily helps sales professionals assess their opportunities and competitive position, develop strategies, identify customer milestones, and formulate and execute closing plans.
- **Siebel Enterprise Selling Process (ESP).** The Enterprise Selling Process methodology enables account teams to target, penetrate, and nurture large strategic accounts. By automating the account planning process and improving coordination across the account team, Siebel ESP helps sales professionals more-effectively execute strategic plans, develop new business opportunities, manage key executive and partner relationships, and coordinate team activities.
- **Siebel Portfolio Management Process (PMP).** The Portfolio Management Process methodology is a set of account-based management sales procedures designed to assist sales reps and managers alike in targeting accounts that promise to yield the highest return. The Siebel PMP structured sales methodology helps sales professionals meet or exceed revenue targets while protecting established account relationships from competitors.
- **Siebel Workflow.** Automates business processes within Siebel Sales. The intuitive graphical interface of this interactive software tool lets sales managers automate specific business policies and procedural tasks, improving sales effectiveness as well as improving customer service.
- Siebel provides several **interoperability options** for exposing CRM data within common desktop applications, such as Microsoft Outlook or IBM Notes as well as

mobile devices. This enables users to interact with customer data in the applications and on the mobile devices where they are already working. These include:

- Siebel (Disconnected) Mobile: full-function Siebel CRM applications optimized for mobile devices, whether connected or disconnected
- Siebel CRM Desktop: Enables a subset of Siebel CRM functionality addressing the most common user tasks from within a Microsoft Outlook or IBM Lotus Notes client
- Siebel Server Sync for Microsoft Exchange (SSSE): Synchronizes calendar, task, and contact data between Siebel CRM and Microsoft Exchange, which in turn allows propagation to Microsoft Outlook and popular mobile devices.
- CalDAV / CardDAV: Exposes the Siebel Calendar and Contact lists to mobile device users with standards-compliant devices.

Share Information On the Go with Siebel Mobile Sales

Siebel Mobile Sales applications support the increasing number of sales professionals who work outside their connected office environments. With the rich functionality of Siebel Sales applications—coupled with the convenience of a mobile device—these applications deliver vital information that mobile professionals need, whenever, wherever, and however they need it. With Siebel Mobile Sales applications, you can leverage your existing investments in enterprise applications, and extend it to thousands of remote users in a cost-effective manner.

Siebel Mobile is ideal for field sales representatives whose access is limited to their mobile device while travelling or in the field with a customer. Siebel Mobile is designed to maximize usability, productivity and collaboration. The application is available in connected as well as disconnected mode. It is also available for specific industries like financial services and life sciences, apart from the cross industry application.

SIEBEL MOBILE SALES

KEY BENEFITS

Implementing Siebel Mobile Sales applications translates directly into lower costs, more-profitable and more-predictable revenue growth, and higher-quality customer interactions. Among other benefits, Siebel Mobile Sales lets you

- Enable sales professionals to use the application in connected and offline mode
- Update enterprise databases on the fly, increasing the accuracy and timeliness of corporate data
- Improve sales reps' access to accurate, up-to-date business, customer, and product information anytime, anywhere
- Lower sales operation costs through higher worker productivity and efficiency
- Increase customer satisfaction by providing relevant information in real time
- Improve IT operations by configuring business rules once and deploying them across multiple business platforms

Access the Right Information at the Right Time with Oracle Sales Analytics

Enterprises depend on information to optimize performance. However, most organizations are hampered by information that is incomplete, out of date, or otherwise inadequate for answering critical business questions in a timely fashion. Oracle Sales Analytics is designed to help sales organizations leverage the power of timely, actionable information to improve the quality of decision-making.

By seeking out and aggregating information hidden in systems across the enterprise—including financial management, supply chain, and CRM applications—Oracle Sales Analytics provides sales professionals with the insight they need to take immediate and effective action. Not only do they get a complete and comprehensive picture of customer needs and buying patterns, but they can also immediately spot potential problems and identify opportunities to increase revenue, decrease costs, and enhance profitability.

Provide Insight When and Where You Need It

To compete effectively in today's marketplace, companies need to deliver the right information to the right person at the right time. Oracle Sales Analytics provides timely metrics, alerts, and reports that enable sales team members to take action based on facts rather than intuition. It can also proactively deliver insight to salespeople in the field via laptops, cell phones, or other mobile devices, ensuring that they always have the

latest information for making informed decisions and increasing their close rates.

Even more important, because Oracle Sales Analytics is part of Oracle Business Intelligence applications, companies can easily combine data from sources across the enterprise to provide salespeople with complete views of their accounts. With Oracle Sales Analytics, companies can maximize the value of their customer relationships and improve the effectiveness of their sales organization.

Increase Accuracy of Forecasts and Monitor Results

Sales executives need up-to-the-minute information for monitoring sales activities and accurately comparing their progress with sales goals. Moreover, measuring progress against past company experience can provide early insight into potential problems, enabling sales professionals to take proactive steps to get the opportunity back on track.

With Oracle Sales Analytics, sales executives can receive alerts when territory performance drops below weekly targets, enabling them to take appropriate action, such as coaching their sales representatives or assigning additional resources to a particular account. Oracle Sales Analytics also provides sales professionals with real-time insight into sales opportunities, including how long each opportunity has been in the pipeline and the current status of team selling efforts.

Increase Sales Force Effectiveness

Sales managers need fact-based insight into the effectiveness of their sales representatives so they can provide the necessary coaching to improve performance. Additionally, a holistic view of pipeline opportunities enables better decision-making by helping sales representatives focus on the best opportunities. By providing best-practices metrics, Oracle Sales Analytics enables sales managers to identify strengths and weaknesses and address them at the individual level. It also provides managers with the ability to apply the same best practices throughout the sales organization.

Improve Responsiveness

Whether in the office or in the field, your sales professionals need information from all functional areas of the company so they can respond quickly to customer issues and resolve them before they become problems. Your sales force may need to perform account and activity checks, review service requests, or determine the best products to up-sell and cross-sell. With Oracle Sales Analytics, sales professionals receive timely information that gives them a complete picture of each customer relationship, enabling them to take action to maintain account satisfaction.

Maximize Resource Use

By understanding their pipelines, sales executives can identify critical opportunities and assign resources to maximize profitability rather than expending them on less promising activities. Although traditional sales reporting and analytics applications have typically focused solely on an organization's pipeline, Oracle Sales Analytics provides sales professionals with new levels of business insight into every aspect of the customer relationship. Using Oracle Sales Analytics in combination with Oracle Order Management and Oracle Fulfillment Analytics gives sales representatives access to actionable information from financial, billing, order management, and CRM systems to help them increase customer satisfaction, lower sales costs, and maximize revenue.

Promote Faster Implementation

Providing actionable insight to the sales organization requires powerful analytic tools.

However, most business intelligence solutions are costly, time-consuming to implement, and difficult to modify when business requirements change—as they invariably do. Oracle Sales Analytics is an out-of-the-box solution designed for fast deployment at a dramatically reduced cost that involves minimal risk and provides better business results. By including prebuilt data models, more than 150 metrics, and best practices based on Oracle's experience across thousands of sales-force-automation implementations, Oracle Sales Analytics allows users to customize and extend the application without programming. The intuitive Web-based interface requires very little training, enabling rapid user adoption.

Tailor Reports and Dashboards

Oracle Sales Analytics includes a prebuilt, fully configurable, and extensible data warehousing solution based on Oracle Business Analytics Warehouse, a comprehensive data repository optimized for analysis and tailored to industry-specific customer and business needs. Oracle Business Analytics Warehouse unifies all customer, sales, marketing, service, e-commerce, and product data across the enterprise and includes a high-performance extract, transform, and load (ETL) engine that transforms data from Siebel Sales applications and other internal and external sources into actionable intelligence. Oracle Sales Analytics also offers prebuilt data extractors that let companies directly extract and aggregate the vast amounts of corporate data stored in enterprise resource planning (ERP) systems and other applications.

Enable Scalable Intelligence

Oracle Sales Analytics includes Oracle Business Intelligence Server, an advanced analytics platform that delivers unsurpassed scalability. By supporting thousands of users, huge data volumes, and multiple heterogeneous data sources at a significantly lower total cost of ownership than other solutions, Oracle Business Intelligence Server provides seamless access to information contained in relational, host, and XML-based systems.

Additionally, your organization receives timely, complete, and relevant intelligence from multiple data sources and systems—front-office, back-office, legacy, and e-commerce—while enjoying high performance. Oracle Business Intelligence Server also provides an open and fully extensible platform that lets you leverage existing investments in data warehouses and business intelligence tools.

Provide Self-Service Access

Oracle Business Intelligence Answers complements Oracle Sales Analytics applications by giving your organization self-service access to interactive, proactive intelligence over multiple devices. With Oracle Business Intelligence Answers, any sales professional can easily get real-time answers to ad hoc business questions; analyze the results; create charts, pivot tables, and reports; and then save, organize, or share the results with team members or sales managers.

In addition, Oracle Business Intelligence Delivers ensures that the right information is delivered to the right person at the right time. Oracle Business Intelligence Delivers lets each of your sales team members create proactive analytic agents that automatically detect events of interest to them. The agents immediately notify the users (via Web, wireless, voice, or mobile device) when relevant information is available, and then deliver that data automatically to each user's preferred device.

ORACLE SALES ANALYTICS

KEY BENEFITS

Enables business users to

- Analyze pipeline opportunities to determine necessary actions for meeting sales targets
- Determine which products and customer segments generate the most revenue
- Understand which competitors you face most often and how to win against them
- Identify up-sell and cross-sell opportunities within existing accounts

Enables IT to

- Accelerate deployment of sales analytics to connected and remote users alike
- Reduce implementation cost and risk

through integrated analytic solutions

- Integrate data from multiple enterprise sources across the company value chain
- Flexibly adapt to changing business needs by leveraging, rather than replacing, existing technology investments
- Deliver better business results

Collaborate Across the Organization

All members of your extended enterprise—employees, customers, or partners—must collaboratively set goals, measure progress, and drive results. Oracle Sales Analytics delivers rich and immediately useful information to all stakeholders. With its intuitive interface and internet-based architecture, Oracle Sales Analytics can provide thousands of users with self-service access to up-to-the-minute analytics that are personalized and relevant and that incorporate data from multiple sources across the organization.

Measure Sales Effectiveness

Your marketing and sales professionals need help to gain insight into product demand, pricing trends, and promotion effectiveness. Siebel Product Selling Effectiveness enables your organization to analyze information on all these topics (and more) across all channels, including the Web, call centers, field sales, and reseller partners. Empowered with this information, your sales and marketing professionals can fine-tune channel management, focus promotional and sales efforts on the most-profitable products, and identify the most effective cross-sell and up-sell opportunities.

Provide Executive Monitoring

Executives need ways to track the health of their department or company without having to monitor multiple data sources. Through consolidated views that include key metrics pertaining to marketing, sales, service, customers, and products, Oracle Sales Analytics provides executives with aggregated analytics dashboards that give them easy access to the information they need. Data used to populate dashboards can come from other Siebel CRM applications or from ERP or other legacy systems.

Unparalleled Ease of Use and Deployment

Each Siebel Sales application can be accessed with a standard Web browser, reducing deployment costs while letting organizations provide in-depth information to partners, resellers, customers, and prospects via the Web. The application suite is available on all major computing platforms and accommodates mobile, connected, thin, and handheld clients. In addition, Siebel Sales supports major European and Asian languages, multiple currencies, and performs automatic currency conversions.

With a rich visual development environment and prebuilt support for seamless integration with leading middleware products, Siebel Sales satisfies even the most-rigorous requirements for application deployments. Its architectural flexibility enables organizations to configure once and deploy everywhere and its automated upgrades and remote software distribution capabilities provide full lifecycle management at reduced expense. With many thousands of implementations at leading enterprises around the globe, Oracle's Siebel Sales has delivered proven return on investment faster than ever before.



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