Siebel CRM

The Future of Siebel, Strategy and Roadmap
For the World's Most Complete CRM

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Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle’s products remains at the sole discretion of Oracle.
Program Agenda

1. Oracle CX Strategy
2. Siebel Strategy and Roadmap
3. Siebel Highlights
4. Oracle Technology Uptake
5. Summary
Oracle CX Strategy
Overview
Your Customer has CHANGED
Oracle Customer Experience
Complete Customer Experience Platform

Integrated Customer Experience Foundation
- Social Network
- Mobile
- Analytic KPIs & Dashboards
- Predictive Analytics
- Integrations

Siebel CRM
Complete Applications
Siebel Strategy and Roadmap
Rich History, Strong Future

- ~20 year history of delivering best-in-class CRM solutions
- 21 Industry specific business processes
- 22 languages supported in a single repository
Customer Momentum and Support Timelines

84%

Working With Siebel 8.1.x/8.2.x
Siebel Roadmap – Endurance with Agility

Annual Innovation Packs (IPs), Monthly Patch Sets

- IP2013
- IP2014 Upcoming release
- IP2015*
  *0-12 months
- IP2016
- IP2017
- IP2018
- IP2019
- IP2020
- IP2021
- IP2022+
Simplicity with Sophistication

Customer Experience

Business Agility

Industry Innovation

Engineered Systems
Oracle Applications: Current Release and Roadmap

Siebel CRM

**Current Release**
Q3 2014

**Customer Experience**
- New customer self-service and PRM applications that deliver a more modern and intuitive user experience
- New complete cross-channel commerce capabilities for a consistent and enhanced customer experience
- New mobile applications framework for both connected/disconnected modes for Sales and Service

**Industry Innovation**
- New Telco subscription management user experience for Communications that increases customer satisfaction
- New embedded billing insight/analytics and multi-site ordering for service companies including Utilities
- Improved citizen experience and case processing for Public Sector
- New function space diary for Hospitality
- New Life Sciences and Field Service mobile solutions

**Increased Agility**
- Enhanced personalization and ability to change look and feel of applications by business users
- Improved application life cycle management – ease of development (IRM), deployment and diagnostics
- Streamlined installation and patching with a simple wizard based solution

**What’s Next**
0-12 month planning cycle

**Customer Experience**
- New persona driven UI based on roles to enhance usability and improve productivity for multiple browsers and devices
- New applications that promote intelligent cross-channel customer interactions through Next Best Action framework
- New Contact Center UI for cross-channel Service (Sales, Service, Social, Chat). A more engaging user experience for reps and agents for all types of Contact Centers

**Industry Innovation**
- Life Sciences mobile application focusing on the daily role of a Pharma rep with enhanced content delivery
- Clinical solutions with Risk-Based Monitoring for Trip Report
- New Financial Services mobile application that improves Sales effectiveness with Needs Analysis
- New Public Sector customer self-service portal with screening for services, knowledge management and social engagement, also enabled for mobile devices.
- New process for Telco, doubling order capture efficiency

**Increased Agility**
- Responsive Web Design that allows users to create views once and deploy across desktops and mobile devices
- Annual innovation packs and prescriptive, incremental, monthly patching process providing innovation, stability and recommended solutions for your business
- Cloud integrations with Marketing, Sales, Service and Social

**Future Directions**
Post 12 month planning cycle

**Customer Experience**
- Enable Sales and Service to collaborate improving customer experience while providing engagement transparency
- Call Center stability with the agility of Cloud Knowledge, Self-Service and Chat for memorable customer experiences
- Present digital corporate assets interactively using eDetailing with session, response tracking and reporting
- Enhanced search experience, intuitive catalog search and visualization of options/results for quicker search analysis

**Industry Innovation**
- Enhanced Public Sector portal for cross-channel with online applications and eligibility determination
- New Telco app to increase productivity in the Contact Center. Dynamic Bundling to simplify deal configuration
- New Retail Execution application supporting call-to-order-to-cash for Consumer Goods including Direct Store Delivery Support for Disconnected Mobile Users

**Increased Agility**
- New Open Interface framework for cloud integrations
- Agile Siebel Configuration & Deployment with business user driven application configuration
- Leverage the power of in-memory database for improved real-time performance with ad-hoc queries
- Embedded EDQ and Data Governance Management Reporting for improved master data management
Features Planned for IP-2014

Customer Experience
- New re-designed UI for Siebel applications for both desktop and tablets.
- Open UI
  - Hierarchy View for Account, Contact & org chart and organizational views, inline editing and attachments, iHelp and Smartscript designer
  - Marketing & Loyalty Program Designer
  - Barcode scanning with global search and Print and email Invoice and Signature capture
  - Product Configurator administration & Quote and Order Home Pages
- Hybrid Mobile applications using MAF
- Enhanced performance and usability with disconnected applications
- CRM Desktop to support Service interactions
- Social Data profiling (MDM/CRM)

Industry Innovations
- Subscription Management for Communications
- Life Sciences Mobile solution with content presentation using edetailing
- Relationship banker tablet solution with needs analysis
- New Public Sector Self-Service solution for Eligibility determination
- New clinical Risk based Trip monitoring and integrated Health Sciences Solution
- CRM Desktop application for Financial Services (Banking and Insurance)

Business Agility
- Responsive Web Design that allows users to create views once and deploy across desktops and mobile devices
- Usability improvements for Install, Patching and Upgrade process
- Annual innovation packs and prescriptive, incremental, monthly patching process providing stability and recommended solutions for your business
- Intelligent interactions with Next Best Action
- Oracle CX integrations bring the agility of cloud for Siebel customers across Marketing, Sales, Service and Social
### Features Delivered/Planned

<table>
<thead>
<tr>
<th>Features</th>
<th>IP-2012</th>
<th>IP-2013</th>
<th>IP-2014</th>
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<tbody>
<tr>
<td>Open UI – Framework including CTI, Smart Script, TBUI, Email Response</td>
<td>New UI - Customer Dashboard Scheduling, Search, Reports Scheduling and Parameterization,</td>
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<td>CRM Desktop for Lotus Notes</td>
<td>Intelligent offer presentment and execution with Next Best Action framework</td>
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<td>Real-time rewards and recognition with high performance loyalty engine</td>
<td>Advanced Scheduling and Dispatching – ORS 2.1 integration</td>
<td>Product configurator administration &amp; Quote and Order Home Pages</td>
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<td></td>
<td>Deeper Loyalty – 8.2.2 solution, Complete Meeting Packages</td>
<td>Marketing &amp; Loyalty Program Designer</td>
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<td>• High Availability upgrade and Single Step SEA-&gt;SIA upgrade</td>
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<td>• Deployment and Diagnostics for Operational Excellence</td>
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Siebel Highlights
Innovation IP2014 and Beyond
Customer Experience
## Open UI – By Features

### Usability and Productivity
- CTI, Email Response, Notifications
- Calendar – Daily, Weekly, Monthly completely configurable
- Siebel Search
- Chart and Reports
- Product Configurator, MVGs, Textboxes
- Smart Script, TBUI
- File attachments with drag and drop capabilities
- Currency, datetime controls
- Customer Dashboard
- Accessibility
- SiteMap filtering

### Business Agility – Runtime Configuration
- Change look and feel of applications based on color themes, navigation – tab versus menu navigation
- Set theme by user preference

### Usability and Productivity
- Binocular Find and Search – single navigation paradigm
- Siebel Chat
- Promotion configuration and catalog for C/OM
- Dispatch board for agents
- Drag and Drop framework – integrated with shopping cart and calendar appts
- Partner Relationship Management
- Self-Service applications
- Redesigned Siebel Marketing and loyalty
- Function space diary for event management
- Self-Service Registration

### Business Agility – Runtime Configuration
- Change Look and feel of applets and views
- Ability to create application look and feel by Roles, Responsibilities and User groups

### Usability and Productivity
- iHelp
- Gantt Chart and Resource Scheduler
- Hierarchy View for Account, Contact & org chart
- Organizational Analysis View
- Inline editing for attachments & Correspondence
- Barcode scanning with global search
- Product Configurator administration
- Notifications for Universal Inbox
- Quote and Order Home Pages
- Smartscript designer
- Marketing Program Designer
- Print and email Invoice and Signature capture

### Business Agility – Runtime Configuration
- Responsive Web design
- Ability to create views once and deploy across desktops and tablets

### Roadmap
User Interface

New User Interface professionally re-designed across the application

- New context Sensitive navigation
- Collapsible Content menus
- Device friendly design
Mobile – Disconnected

Enhanced Disconnected solution focused on the day in the life of a mobile user

- Hybrid Application delivered based on Oracle Mobile Application Framework
- Improved Synchronization for performance
- Content driven applications with edetailing
CRM Desktop

Embedded CRM in the desktop application – MS Outlook or Lotus Notes

- Service Applications with Field Service
- New Fins Application with Call reporting
- Outlook 2013 (32 or 64 bit), Lotus Notes 8.5.3 (32 bit)

- Service requests with activities, attachments and product details
- Financial Objects with call reporting
Customer Experience with Cloud Applications

Extend Siebel with CX Cloud Solutions

- Modern, Insight driven Sales and Digital Marketing
- Self-Service with multi-channel support
- Social Insight and Collaboration
Industry Innovations
Communications

Managing telecommunications customer subscription

- Guides users through operations
- Minimized number of clicks
- Touch-screen friendly user interface
Financial Services

Mobile Relationship Banker Application

• Home view based on day’s top activities
• 360° Customer View with needs Analysis
• Account Origination
Public Sector

World Class Citizen Self-Service Portal driven by OPA

- Streamlined user experience
- Eligibility determination engine powered by OPA
- Complete Application process flow
Business Agility
Install, Patching and IRM

Easy uptake of Innovation Packs

- Simplified - Efficient, reliable, and consistent solution for both new and patch installs
- Simplified IRM process for repository Uptake
- Simplified Configuration with enhanced user input validation

<table>
<thead>
<tr>
<th>Area</th>
<th>% Improvement</th>
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</thead>
<tbody>
<tr>
<td>Size of Install - Server</td>
<td>68%</td>
</tr>
<tr>
<td>Size of install – Tools &amp; MWC</td>
<td>50%</td>
</tr>
<tr>
<td>Time to Install</td>
<td>50%</td>
</tr>
<tr>
<td>Enterprise Configuration - Steps</td>
<td>24%</td>
</tr>
<tr>
<td>Server Configuration - Steps</td>
<td>44%</td>
</tr>
<tr>
<td>Database Configuration - Steps</td>
<td>20%</td>
</tr>
<tr>
<td>Time taken to run IRM</td>
<td>50%</td>
</tr>
<tr>
<td>Time for Pre-Merge Steps(IRM)</td>
<td>40%</td>
</tr>
</tbody>
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Oracle Policy Automation

Reducing Risk, Cost and Time to Market

- Single definition of rules across the enterprise
- Change rules without affecting the enterprise
- Meta-data driven connector for simplified rules definition

Benefits of implementing policy automation

<table>
<thead>
<tr>
<th>Area</th>
<th>Without PA</th>
<th>With PA</th>
<th>% Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Rule Capture</td>
<td>200 days</td>
<td>20 days</td>
<td>90%</td>
</tr>
<tr>
<td>Logic Updates</td>
<td>90 days</td>
<td>3 days</td>
<td>97%</td>
</tr>
<tr>
<td>Business Logic Implementation</td>
<td>$1 Mn</td>
<td>$200K</td>
<td>80%</td>
</tr>
</tbody>
</table>
Run-time Configuration

- Web based IDE with Meta-data based configuration changes
- NO more SRF and Web Templates
- Drag and Drop Web Template development
- Multi-User development environment

Web based IDE, Siebel Tools within the UI

Metadata based SRF with version control
Single Unified Tools on the Web

Siebel Tools re-imagined, role based IDE from the developer to the end-user

• Developer
• Quality Assurance
• User Acceptance
• Business Owner
• Business User

Go into Developer Mode
Role based editing
Drag field
View Fields etc that can be added
Drag field into applet
Added Field
Publish Changes
to QA for testing
Publish changes
Review Changes
in app with single
clock
Review changes
Technology Uptake and Siebel
Optimized Testing of Siebel Applications

- Packaged Siebel Test Automation Interfaces and Objects (STAO)
- Functional Testing suite for Open UI and HI
- Load Testing suite for internal PSR testing
Oracle 12c Database In-Memory

The advantages of Oracle 12c Database In-memory with Siebel

- Improved performance using ad-hoc queries with Siebel Search
- High-performance and low usage of database and system resources
- Eliminates the impact of long-running queries in production

Case Study:
- Tech Support Engineer uses keyword search to look for existing SR#s to find a possible match
- Keyword searches are simulated in the context of a large-scale Siebel Contact Center
Performance Optimization

Siebel performance & scalability satisfies the most demanding requirements

- Scaled up to 40,000+ users in a Contact Center scenario
- Future growth assured with Linear scalability for Order Capture
- Zero-think time achieved with Loyalty engine optimization

1 HW Configuration - Call Center: 3 nodes of ELX3 & 1 node EDX3 Order Management: 3 nodes of ELX3 & 1 node EDX3 Loyalty Accrual WS: 8 nodes of ELX3 & 1 node EDX3

2 Actual results may vary, based on a broad range of implementation-specific factors, such as transaction mix, hardware platform, network parameters, and database size. Oracle does not warrant or guarantee that customers will obtain the same or similar results.
Summary
Key Takeaways

- Oracle is Committed to Siebel and is delivering many New Product Innovations
- There is a Rich Product Roadmap focused on Simplicity while harnessing the underlying sophisticated solution
- Leverage Siebel’s data-model and industry modeled business logic with Oracle’s CX cloud solutions
Siebel CRM Resources

- Siebel CRM CX strategy, solution information, feature videos etc

- Oracle Customer and Partner Success Stories (including Siebel CRM)
  - [http://www.oracle.com/search/customers/browse?Ns=InDateMillis%7C1&Ntt=Siebel](http://www.oracle.com/search/customers/browse?Ns=InDateMillis%7C1&Ntt=Siebel)

- For support issues, My Oracle Support - Support Issues (Doc ID 1466493.2)
  - [https://support.oracle.com/epmos/faces/DocumentDisplay?id=1466493.2](https://support.oracle.com/epmos/faces/DocumentDisplay?id=1466493.2)

- Oracle University – Latest TOI’s listed by Release
  - [http://www.oracle.com/oll/siebel](http://www.oracle.com/oll/siebel)
Hardware and Software
Engineered to Work Together