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Closing the Deal: the Oracle Fusion Customer Relationship Management User Experience
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Executive Overview

A great customer relationship management (CRM) solution can enable a significant return on investment and revenue when its user experience is designed around the natural workflows of its users, such as sales representatives and their managers. The most powerful user experience will support this results-driven profession by providing a well-coordinated, timely information flow. The user experience will incorporate practical tools that help users develop a solid understanding of products, as well as sharp insight into their customers, territories, and the market. Oracle Fusion Customer Relationship Management Sales Force Automation (CRM) products facilitate the sales process by bringing the information and tools that users need directly to them, within the context of a well-designed, user-centered application.

Introduction

Companies large and small stand to benefit from the efficiencies provided by a first-rate CRM user experience. When designing the Oracle Fusion CRM SFA products, the Oracle Fusion User Experience team employed a variety of user-centered techniques to explore the goals, needs, methodologies, and work environments of CRM users. We interacted with people from large corporations to midsize businesses to mom-and-pop settings, where the president of the company was always within earshot of the person answering the phone.

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In addition, we conducted in-depth field studies to observe how end users, such as sales representatives, use their mobile and other wireless tools and devices when on the go. Altogether, the Oracle Fusion User Experience team conducted more than 70 usability studies for Oracle Fusion CRM. More than 250 customer organizations and more than 550 individual participants took part in these studies.

One of the most pervasive themes from the usability research that we conducted was that a CRM application will not be embraced unless its user experience results in increased sales. In response, we created a user experience that will increase the productivity of everyone involved in the sales process—which, in turn, will increase sales. Welcome to Oracle Fusion CRM.

Here are the top three learnings from our customers and how we’ve incorporated these findings into the Oracle Fusion CRM user experience.

- Selling is hard. Selling can be particularly challenging when the economy has tumbled, companies and individuals have cut back, and purchasing decisions are being scrutinized.
We designed Oracle Fusion CRM to make selling easier. In particular, Oracle Fusion CRM includes essential tools that help users manage their accounts and opportunities, as well as communicate more effectively with their prospects. Users can work faster, with more time to prepare for activities, such as preparing for meetings and developing prospects.

- People who sell may wear many different hats. For example, there are huge sales teams with clearly defined roles that might merge at times. At smaller companies, sales might be one part of a job that encompasses many diverse responsibilities.

We designed the Oracle Fusion CRM user experience to support multiple roles and functions during the same user session, eliminating the need for the same user to log in and out as separate roles.

- An individual salesperson’s success is often heavily influenced by his or her ability to build winning personal relationships with key customer contacts. Investing in those relationships takes time.

We designed a user experience that makes it easy to find and keep everything that users need to know about their customers all in one place. The design helps users keep track of customer interactions. Users know what customers have, what they need, and whether or not they have been experiencing any issues.

As a result of Oracle’s world-class user research and design processes, Oracle Fusion CRM is the industry’s most modern, well-designed, easy-to-use, and useful solution that enables those

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involved with sales to increase their productivity. The rest of this paper provides details on the unique user interface approach incorporated in Oracle Fusion CRM.

What We Learned from People Who Sell

The user-centered design (UCD) cycle begins with identifying who our users are, learning about their characteristics, and then engaging in their worlds. For Oracle Fusion CRM, we spent a lot of time with people who sell and people who manage sales teams. Although the size of the companies, the scope of territories, and the quotas and goals can vary considerably, we found certain values and practices in common across CRM users.

Closing the Deal Matters Most

Success in sales is clearly defined. Quotas are set at individual, group, and company levels. Many metrics are employed to determine if sales goals are being met. Our users are laser-focused on selling. Oracle Fusion CRM is designed to enable users to flow through and manage the sales process in a way that models the techniques that they have honed and are familiar with. But there’s a modern twist: a user experience that dramatically increases efficiency. With quick lead identification, easy step-by-step creation of personalized sales campaigns, real-time access to information on products and customers, and meticulous cross-checking before closing a deal, Oracle Fusion CRM brings the needed tools and information right to the user in a centralized, integrated desktop.

A CRM Application Must Help You Sell

People who sell are generally not interested in technology for technology’s sake. What they are interested in are usable tools that help them sell more. As their environments change, salespeople need

to access their CRM applications in different ways, such as through the Internet, mobile devices, or other desktop clients such as Microsoft Outlook e-mail or calendar. We designed the Oracle Fusion CRM user experience to do exactly that: help users sell, wherever they are.

**Opportunity Name**

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<thead>
<tr>
<th>Opportunity Name</th>
<th>Customer</th>
<th>Primary Contact</th>
<th>Line Close Date</th>
</tr>
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<tbody>
<tr>
<td>Elite Vario Optv</td>
<td>Sizzle Inc. (Portland, US)</td>
<td>Steven Sample</td>
<td>8/13/11</td>
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<td>UP DG 650 Opportunity</td>
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<td>Joshua Baker</td>
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<tr>
<td>Pinnacle Green Server Maintenance</td>
<td>Pinnacle Technologies (Seattle, US)</td>
<td>Isaac Nelson</td>
<td>8/13/11</td>
</tr>
</tbody>
</table>

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Oracle Fusion CRM saves the salesperson time by organizing and automating their daily tasks. The entire sales flow is laid out in a way that makes sense. For example, there is no need to leave the task at hand in order to hunt for needed information. Customer data is right at your fingertips. Relevant product information can be pulled in without wandering around the application to find it. Because the daily lives of salespeople are consumed with communicating, advanced social networking tools are included to facilitate real-time collaboration (Figure 2). Convenient tools for tasks, such as qualifying leads with an easy question-and-answer-based interface and predicting customer requirements, are integrated into the user interface exactly where they are needed. And deciding which potential opportunities to focus on is made easier through the Oracle Fusion Sales Prediction Engine (Figure 3).

**A CRM Application Must Help You Manage the Sales Cycle**

Just like the people they manage, sales managers are driven by “making the numbers.” These sales managers need a user experience that enables them to conveniently manage their territories; aggregate information to help them train, lead, and motivate their sales staff; and produce revenue results that grow their companies. Oracle Fusion CRM makes their jobs easier by organizing the information that they need in a way that supports decision-making processes. For example, by providing a single place...
within the user interface to plan, align, and publish territory proposals, Oracle Fusion CRM helps managers maximize revenue potential. Or, consider the perpetual challenge of forecasting. By taking advantage of the Oracle Fusion CRM consolidated view of forecast details across territories and sales representatives, sales managers can increase the accuracy of their forecasts.

![Oracle Fusion Sales Prediction Engine](image)

**Figure 3. Oracle Fusion Sales Prediction Engine. Opportunity Landscape Heat Map in Oracle Fusion CRM helps you quickly focus on your most promising prospects.**

**Time Is Money**

**Less Time Learning Means More Time Selling**

From their first day on the job, sales representatives have to successfully absorb huge amounts of information. Not only do they need to know their product lines and customer bases, but they also must be comfortable with the sales process itself. Learning how to use a CRM application to support a company’s sales methodologies should not be burdensome. The Oracle Fusion CRM user experience has been designed to be easy to learn, with an intuitive user interface. The Sales Coach concept in Oracle Fusion Sales helps salespersons learn their company sales processes by guiding and prompting them as they go along, thus improving sales performance and consistency across global teams.
The ability to transfer knowledge from one user experience to another accelerates the learning process. With that in mind, Oracle Fusion CRM incorporates many of the conventions that sales representatives are familiar and comfortable with from the Internet. For example, new users generally already know how to send e-mail, search and navigate the Web, and interact with others in online communities. Users can perform these functions in much the same way in Oracle Fusion CRM. In fact, users can access Oracle Fusion CRM from within a Microsoft Outlook application (Figure 4). Also consider social networking, an indispensable online activity for a sales team. Oracle Fusion CRM provides social networking tools right within the application, such as embedded discussion forums that facilitate synergistic collaboration in the context of creating a compelling presentation associated with an opportunity. Users can easily access these tools and many other features from a desktop or from mobile devices, such as an Apple iPhone or Research in Motion, Limited, or BlackBerry.

Sales representatives will find even more Internet conveniences built into Oracle Fusion CRM. Want to contact someone right away? Simply click the icon to the top left of the contact’s name, and all available contact information about that person appears. Internet users are accustomed to searching. Not only does Oracle Fusion CRM provide robust keyword and advanced search functionality, but also it enables users to tag objects directly, providing for easier recognition, searching, and organization.

Our user research showed us just how much people who sell are “on the go.” In response, we made Oracle Fusion CRM accessible on a mobile platform. Once in the application, salespeople can easily...
access the information that they need while on the road (Figure 5). They don’t need to stay glued to their computers. Wherever they are, Oracle Fusion CRM helps salespeople get going by conveniently providing the highlights that they need. For example, sales representatives need venture no further than the Sales Dashboard (Figure 6), to access high-level information about appointments, tasks, leads, opportunities, and forecasts.

By clicking the personalized Sales Dashboard, users can simultaneously manage all of the deals that they are working on and keep track of their customers. By providing this kind of easy access to what they need to know first, Oracle Fusion CRM enables salespeople and their managers to prioritize their tasks and manage their time efficiently.
A Smart and Adaptable User Experience Boosts Productivity

Productivity improves when people can organize their work environment the way that they like. The Oracle Fusion User Experience team designed Oracle Fusion CRM to support the way that people in sales perform their jobs. Users can personalize their desktops to suit their work styles by directly manipulating the way information appears. They can perform basic customizations, such as reordering and resizing table columns, as well as perform enhanced functions, such as personalizing and moving regions on dashboards and embedded utilities. Here are some examples:

- Automated logging of customer interactions reduces manual data entry, leaving more time to actually interact with customers.
- Users can search for opportunities that meet specified criteria, such as revenue potential and opportunity status, and then save the search and set it to automatically run for future use with the Oracle Fusion CRM personalized search utility.
- In-context user assistance provides a formula for a particular forecasting metric when your cursor hovers over a field labels. Users don’t need to leave a task and look elsewhere for explanations.

Figure 6. Oracle Fusion Sales Dashboard summarizes revenue pipeline and real time event updates.
Everything You Need, When You Need It
Sales representatives must stay current on both customers and opportunities. The information associated with either of these changes frequently. It’s essential to have the freshest, most accurate data available, without wasting time looking for it. Oracle Fusion CRM provides an integrated, elegant user experience that makes it easy to find the latest customer and opportunity information without leaving the current task.

Centralized Customer Data
One of the most challenging aspects of selling is keeping track of customers and sifting through the considerable amount of fragmented data that piles up based on multiple interactions over time. Oracle Fusion CRM provides a practical, agile solution for this dilemma by keeping updated, robust information about customers all in one convenient place. The centralized Customer Center (Figure 7) enables users to stay put and brings everything that they need to know about a customer directly to the forefront. A collapsible pane on the left side of the Customer Center displays a navigation tree that illustrates multiple aspects of a customer, such as contact information, associated service requests, assets, leads, and opportunities, making it easy to quickly access needed information. Salespeople stay well informed and current with their customers, further enhancing their relationships with them.
Figure 7. Oracle Fusion Customer Center enables you to view all details, including history, about a customer in one centralized location.
Opportunities: All You Need to Know, Right Where You Are

Many factors must be considered when deciding the best way to pursue a sales opportunity. Who is on the sales team? What is the customer’s buying history? What does the customer need? How much will the customer pay? Who is the best person, or people, to speak with? This information is typically scattered across one or more applications, not to mention e-mails, sticky notes, colleagues, and calendars. The Oracle Fusion Opportunity Management Detail page helps users quickly grow an opportunity by integrating relevant, key customer data and history with information about status, progress, available products, references, and competitors. Sales representatives can add discussion topics directly within the Opportunity Detail page (Figure 8), and sales team members can collaborate about a related topic in preparation for a deal. Having all of the information, communication, and planning for an opportunity in one place helps users move the process along quickly and helps users track their opportunities every step of the way.
Embedded Intelligence for Sharp Decision-Making

A substantial amount of analysis goes into selling. Trends are tracked, competitor information is studied, and what-if scenarios are created and modified. Oracle Fusion CRM provides the tools to manipulate and explore this kind of data, complete with system-generated recommendations on the best actions to take based on the data. Instead of turning to other applications or performing back-of-the-envelope calculations, salespersons need powerful, yet practical and actionable analytics for forecasting and quota management within the CRM application. In Oracle Fusion CRM, users will find useful analytics, such as interactive data visualization charts and graphs, graphical heat maps to identify and analyze system recommendations and prospects, and view switchers to help analyze different data dimensions. With tools such as these available within the context of a given task, salespeople can make well-informed decisions in a timely manner.
Identifying the best opportunities to pursue is one of the most critical decisions that sales representatives and sales managers need to make. The Oracle Fusion Sales Prediction Engine can look at past sales transactions and compare them against account history to identify similar opportunities. The Oracle Fusion Sales Prediction Engine can help users decide how to prioritize opportunities, increasing efficiency and success rates by focusing on the most promising things in the pipeline. Salespersons can use the thorough background provided by the Oracle Fusion Sales Prediction Engine to demonstrate sensitive and informed insight into the needs of their customers, helping to make a compelling case for their next purchase.

Conclusion

In order to gain widespread adoption across sales teams, CRM applications must make selling easier. The Oracle Fusion Customer Relationship Management (CRM) user experience is designed to help its users increase revenue and investment return. Modeled on real-world workflows that results-driven professionals use to sell and manage the sales process, Oracle Fusion CRM provides the right information and tools, always in proper context. Users can gain a thorough understanding of all the areas and subject matters that they need to know—their products, customers, opportunities, territories, and so forth—through the Oracle Fusion CRM user experience. Useful features, such as integrated dashboards, detailed views with rich contextual information, analytics, and collaborative tools, provide sales representatives and managers with everything that they need in one place. Your sales teams will embrace Oracle Fusion CRM because it will help them do what is most important: close the deal.
