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.

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What is Oracle Modern Best Practice?
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Digital business processes that evolve with you

End-to-end across the organization

Radically superior results

Leverages emerging technologies
Open, Standard, Free

Finance • Plan to Approval • Asset Acquisition to Retirement • Bank Transaction to Cash Position • Expense Report to Reimbursement • Supplier Invoice to Payment • Customer Invoice to Receipt • Customer Statement to Collection • Period Close to Financial Reports • Report to Forecast • Customer Contract to Revenue • Joint Venture Accounting to Stakeholder Settlement • Period Close to Tax Provision • Tax Provision to Statutory Filing • Lease Abstraction to Termination

Procurement • Supplier Registration to Spend Authorization • Insight to Sourcing • Contract Creation to Spend Compliance • Requisition to Payment • Supplier Return to Settlement

Project Management • Plan to Delivery • Project Contract Billing to Revenue Recognition • Project Cost to Accounting • Resource Analysis to Utilization

Risk Management • Security Design to Separation of Duties • Business Process Risk to Continuous Assurance • Audit Scoping to Financial Reporting Compliance • Risk Identification to Organization Readiness

Talent • Recruit to Onboard • Benefits to Payroll • Time Collection to Payroll • Payroll to Payment • Goal Setting to Performance Improvement • Career Planning to Development • Talent Review to Succession • Absence Planning to Productivity Improvement • Incident Report to Workplace Safety • Employee Insight to Workforce Wellness • Employee Separation to Workforce Analysis

Marketing • Data signals to Unified Profiles • Campaign Execute to Lead • Nurture to Opportunity

Sales • Lead to Opportunity • Opportunity to Quote • Quote to Order • Opportunity to Forecast • Sales Play to Key Account Opportunity • Field Sales Prep to Execution • Vendor Lead to Channel Opportunity • Channel Lead to Vendor Opportunity

Sales Performance Management • Sales Strategy to Execution • Coaching Plan to Performance • Incentive Plan to Payment

Service • Customer Contact to Resolution • Service Request to Dispatch • Knowledge Gap to Solution • Sensor Alert to Preventive Maintenance

Product Information • Product release to supply chain readiness • New product to omnichannel commerce • Dispersed item records to unified master

Supply Chain Planning • Sales Objective to Integrated Business Plan •Demand to Management • Demand Forecast to Supply Plan

Logistics • Outbound Shipment to Delivery • Inbound Shipment to Delivery • Freight Invoice to Approval • Trade Screening to Compliance

Order Management • Multi-channel Order to Promise • Fulfillment Orchestration to Invoice • Order to Drop Shipment

Manufacturing • Forecast to Plan • Production Order to Cost Update • Contract Manufacturing Request to Delivery

Inventory • Plan to replenish • Material request to delivery

Product Lifecycle • Design to Release • Part Qualification to Release • Quality Event to Resolution • Part Qualification to Release • Quality Planning to Receiving Inspection

Industry: Retail • Government • Higher Education • Insurance • Banking • Healthcare • Energy and Water
Modern Best Practice for CX

**Sales**
- Social Prospect to Lead
- Lead to Opportunity
- Vendor Lead to Channel Opportunity
- Channel Lead to Vendor Opportunity
- Sales Play to Key Account Opportunity
- Field Sales Preparation to Execution
- Opportunity to Quote
- Quote to Order
- Sales Forecast to Field Action
- Sales Order to Subscription

**Sales Performance Management**
- Sales Strategy to Execution
- Coaching Plan to Performance
- Incentive Plan to Seller Earning

**Marketing**
- Analytics to Insight
- Insight to Campaign ROI
- Nurture to Opportunity
- Campaign Execution to Opportunity
- Event Execution to Lead
- List Import to Prospect
- Data Signals to Unified Profiles

**Commerce**
- B2C: Multi-Channel to Omni-Channel Experience
- B2C: Awareness to Interaction
- B2C: Interest to Purchase
- B2B: Multi-Channel to Omni-Channel Experience
- B2B: Product Search to Cart
- B2B: Cart to Agreement

**Service**
- Sensor Alert to Preventive Maintenance
- Customer Sentiment to Preventive Maintenance
- Social Listening to Resolution
- Customer Contact to Resolution
- Service Request to Dispatch
- Knowledge Gap to Solution

**Sales Performance**
- Sales Strategy to Execution
- Coaching Plan to Performance
- Incentive Plan to Seller Earning

**Marketing**
- Analytics to Insight
- Insight to Campaign ROI
- Nurture to Opportunity
- Campaign Execution to Opportunity
- Event Execution to Lead
- List Import to Prospect
- Data Signals to Unified Profiles

**Commerce**
- B2C: Multi-Channel to Omni-Channel Experience
- B2C: Awareness to Interaction
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**Service**
- Sensor Alert to Preventive Maintenance
- Customer Sentiment to Preventive Maintenance
- Social Listening to Resolution
- Customer Contact to Resolution
- Service Request to Dispatch
- Knowledge Gap to Solution
Modern Best Practice for Sales
Social Prospect to Lead

**Social listening**
Monitor social media for buyer digital body language, buying cues, requests for recommendations, etc.

**Research prospects**
Research the behavior and identify purchase interests of prospects

**Nurture prospects**
Engage with prospects by positioning the right messages, products and services

**Engage prospects**
Share relevant digital content with prospects over time to articulate the solution and brand positioning, and help your prospects gain deeper understanding of your offering

**Develop initial dialog**
Develop one-to-one conversation with individual buyers showing purchasing signals and capture their contact information

**Create lead**
Generate lead & continue to nurture other prospects who are less engaged

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Product Mix: CX Sales
Popular KPIs: First Response Time, # Leads, Cost Per Lead, No. of Meetings Booked / Held, No. of New Contacts Added
Lead to Opportunity

**Capture Leads**
Aggregate leads across multiple channels, such as social, campaigns, events, and so on.

**Nurture and Score Leads**
Use rule-based nurturing and scoring to identify high-quality leads.

**Assign and Allocate Leads**
Assign nurtured leads to sales teams or channels using rule-based territory allocation.

**Qualify Leads**
Evaluate and prioritize leads. Rank leads after cleansing.

**Review Leads**
Use preconfigured assessment templates to review leads. Recycle unqualified leads for further nurturing.

**Convert Leads**
Accept and convert qualified leads to opportunities.

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Product Mix: CX Sales
Popular KPIs: # Opportunities, % Leads Converted To Opportunities, Cost per Lead, Cost Per Opportunity, No. of Automatically Qualified Leads (AQL)
Vendor Lead to Channel Opportunity

**Vendor lead distribution**
Secure rules-based assignment of leads to channel partners using location, product, customer size, strategy, etc.

**Partner lead acceptance**
Partners review and accept leads using pre-configured assessment templates.

**Lead qualification**
Partners qualify and score leads with assessment tool. Request vendor support as needed.

**Manage quote**
Partners configure and price quote by applying approved pricing and discounts. Share proposal with prospects and manage interaction.

**Deal registration**
Partners register deals for vendor review and approval. Collaborate with prospects to confirm purchase interest and convert qualified leads to opportunities.

**Accept opportunity**
Vendor reviews and accepts opportunities and notifies partners over secure social network.

Product Mix: CX Sales
Popular KPIs: Pipeline and Opportunities by Channel, Sales Status, Sales Stage

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Channel Lead to Vendor Opportunity

**Partner Lead Creation**
Partners monitor social media for buyer digital body language. Respond to RFP, RFI, etc. Create leads and assign to sales team using rules-based territory assignment.

**Partner lead qualification**
Assign purchase interest, then qualify and score leads using assessment tool. Request quote and support from vendor when necessary.

**Manage quote**
Partners configure and price quote by applying approved pricing discounts. Share proposals with prospects and manage interaction.

**Deal registration**
Partners register deals for vendor review and approval. Collaborate with prospects to confirm purchase interest. Convert qualified leads to opportunities.

**Accept opportunity**
Review and accept opportunities from partners. Notify result via secured social network.
Sales Play to Key Account Opportunity

**Go-to-market planning and sales play definition**
Create differentiated, value-centric content to showcase offering. Design sales plays to facilitate guided selling and drive productivity, transparency and accountability.

**Identify and segment**
Perform insight-driven review of key accounts from installed base and list of emerging firms to determine targets.

**Select prospects**
For the selected accounts, determine and confirm decision makers, influencers, purchase patterns/processes and buyer behavior.

**Tailor sales play**
Customize sales play for the key account using prospect insights.

**Sales play training and education**
Improve sales effectiveness and domain expertise of the key account team with on-demand training. Manager monitors progress via secure dashboard.

**Engage and nurture prospects**
Execute account campaign using tailored sales play. Leverage social media as appropriate and monitor digital activity of account decision-makers and influencers.

**Create key account opportunity**
Convert the key account to an opportunity based on positive campaign response. Determine budget availability and likely timing of purchase.

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Product Mix: CX Sales
Popular KPIs: No. of Monthly Onboarding and Demo Calls

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Field Sales Preparation to Execution

Prioritize Activities
Review appointments, go over to-do list, and update status on a centralized homepage over any device. Easily access appointment details and related data.

Review Account and Qualify Leads
Get a complete view of target accounts, including transaction history, past interactions, open leads, and associated contacts. Initiate calls from an account area and qualify leads.

Prepare Trip
Optimize time in the field by locating accounts in the same area and scheduling visits in one trip. Easily find accounts in the vicinity during a trip for drop-in visits.

Conduct On-Site Visit
Check on-site asset information by scanning UPC codes. Add notes to the opportunity using a device camera. Use digital assistant to dictate meeting minutes and add contact information by scanning business cards.

Execute Follow-Up Actions
Get intelligent recommendations based on meeting minutes. Review analysis on the current pipeline and drill down into opportunities.

Advance Sales Stage
Get a notification when a quote is approved or review opportunities with approved quotes on a dashboard. Download proposals and share them with customers.

Product Mix: CX Sales
Popular KPIs: Lead-created rate percentage, Lead conversion rate, Average lead age, Activity rate per won opportunity.
Opportunity to Quote

**Review Opportunities**
Identify high priority opportunities using dashboard-driven review based on win probability and business objectives, such as new product introduction or market segment expansion.

**Verify Account Data**
Verify account data including location, organization structure, and contacts if the account is not actively engaged. Maintain data quality with flags on possible duplicates and easy resource assignment to investigate.

**Engage Account**
Get full account information from order history and service requests to leads and open opportunities. Get intelligent advice on actions to increase win probability. Manage tasks and get account insight on any device.

**Discover Needs**
Initiate discovery with the prospect to position products and services. Align deal timing with the prospect’s buying cycle. Get helpful tips and recommendations for meeting objectives and follow-up tasks.

**Present Solutions**
Schedule meetings and product demos based on roles in the buying group. Manage meeting logistics, secure subject matter resources, and record meeting briefs on any device using business card scan, voice, or text entry.

**Prepare Quote**
Assess possible discount level. Develop solution proposal satisfying customer needs and available budget.

Product Mix: CX Sales
Popular KPIs: Time to Customer Quote, Overall Customer Rank, Average Revenue Per Order, Customer Retention Rate

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Quote to Order

Identify Opportunity
Identify proposal-ready accounts with dashboard-driven review of open opportunities, engagement history, or intelligent recommendations.

Configure Quote
Configure a personalized quote with optimal products, services, and subscriptions that meets the prospect’s needs.

Price Quote
Apply pricing and discounting strategies based on accurate price lists, promotions, and business rules.

Manage Approvals
Manage rule-based quote approval, including criteria, validation, escalation, notification, and approval.

Share Quote
Securely share the quote with the prospect as a tailored formal sales proposal. Update the sales stage and document negotiation interactions. Automatically apply configuration and pricing rules on the modified quote. Ensure the pipeline amount reflects the latest version.

Finalize Offer
Ensure commercial viability with automated or manual rule-based and workflow-routed approval of pricing and terms such as billing, shipping, payment, scheduling, and service level requirements.

Convert to Order
Generate and securely share sales order and confirmation.

Product Mix: CX Sales
Popular KPIs: Time to Customer Quote, Average Revenue Per Order, Average % discount, Cost Per Quote, Sales Closing Ratio

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Quote to Order

Present and negotiate
Securely share rules-based personalized quote, digital collateral, and key information with prospect

Monitor quote status
Dashboard-driven reviews of quote status, totals and time-to-close

Approve pricing
Ensure commercial viability with automated or manual rules-based and workflow-routed approval of pricing

Confirm order options
Determine billing, shipping, payment, scheduling, and service level requirements

Convert to order
Generate and securely share sales order and confirmation

Product Mix: CX Sales
Popular KPIs: Average % discount, Cost Per Quote, Sales Closing Ratio, Lead-to-Sale %
Oracle Modern Best Practice

Sales Forecast to Field Action

- **Review Strategic Forecast**
  Review current forecast, get revenue prediction, ensure pipeline coverage, and collaborate with team members using a centralized dashboard. Leverage machine learning to predict future demand and sales growth and make adjustments.

- **Incorporate Pipeline Insights**
  Review qualified opportunities to fine-tune forecasts. Easily adjust forecasts by recategorizing the likely scenario of an opportunity. Automatically roll up the updates.

- **Assess Pipeline Quality**
  Review team pipeline progression, team member performance, and opportunities at risk using a centralized dashboard.

- **Monitor Pipeline Performance**
  Get key performance indicators on win-loss, opportunity status, quotes, campaigns, and sales activities using a centralized dashboard. Include subscription renewals in addition to net new accounts.

- **Roll Up Forecast**
  Review team revenue forecast against quota and attainment. Get dashboard reports on essential topics, including customer churn and product performance.

- **Implement Planned Actions**
  Easily create tasks and assign them to team members to drive opportunity progress and deal closure.

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**Product Mix:** CX Sales
**Popular KPIs:** Customer Rank by Forecasted Revenue at Risk, Revenue at Risk, Pipeline Conversion Forecast

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Sales Order to Subscription

Manage sales orders
On a centralized dashboard, manage sales orders from any channels including sales, online commerce, mobile APP, and partners. Support combination of products, services, and subscription. Automatically create accounting contracts for future revenue recognition.

Deliver bundled equipment (optional)
Create fulfillment orders: work orders for CTO, POs for drop-ship, and warehouse orders for inventory on-hand. Optimize supply chain strategy to balance costs and service level. Send customers shipment status.

Activate service subscription
Complete any onsite installation and ensure service provision. Automatically link eligible usage to subscription. Continue to offer personalized engagement by leveraging insights from usage pattern, device signal, etc.

Bill customers
Provide timely statement with accurate usage data and billing calculation in any pricing scheme. Send invoices using customers’ preferred channels and offer convenient payment options.

Recognize revenue
In accordance with ASC 606/IFRS 15, automatically recognize revenue over time or point in time from qualified activities such as delivery of goods or services.

Monitor and monetize
Get full view of customer usage and interaction history on a centralized dashboard. Receive notification of at-risk customers and take corrective action. Leverage account insights to identify cross- and up-sell opportunities.

Manage subscription performance
Track performance, usage trends, and revenue churn by product or customer segment. Maximize renewal by leveraging machine learning to identify churn factors and assess account churn likelihood. Innovate business models and product offerings with gained insights.
Modern Best Practice for Sales Performance
Sales Strategy to Execution

Define sales strategy
Align insight-driven plans with territories, targets, behaviors, and business strategy

Model, simulate and design plans
Achieve targeted goals by using real-time performance data to drive what-if analysis. Estimate compensation spend

Define measures and metrics
Determine KPIs, key sales objectives, and other metrics to track of participant progress or attainment

Determine commissions and incentives
Identify incentives based on performance measures and sales targets. Use accelerators, thresholds, and gates to augment behaviors

Incorporate gamification plan
Develop competitive program with incentives, rewards, and recognition using badges, leader boards, and other game mechanics

Execute go-to-market strategy
Launch go-to-market activities in support of plans with regular intelligent reviews

Product Mix: CX Sales
Popular KPIs: Top/Bottom Performers, Close Ratio by Sales Person, Compensation by Sales Person

Cloud Mobile Analytics Collaboration Big Data
Coaching Plan to Performance

- **Develop Coaching Plans**: Review assigned goals and accounts. Create individual plans to achieve objectives, such as strategic account growth and new account outreach. Identify tactical activities, such as account contacts, lead conversion, and pipeline expansion, to achieve sales goals.

- **Incorporate Gamification**: Stimulate engagement with decentralized contests and competitive programs with monetary or nonmonetary awards. Provide real-time leaderboards to track results, ranking, performance, and awarded points on any device.

- **Track Progress**: Monitor organization, team, and individual performance through interactive, secure dashboards across all devices.

- **Check In and Coach**: Review progress with team members regularly. Discuss forecasts, potential commissions, and goals. Incorporate deal-level and pipeline coaching and share successful tactics on engagements, products, and industries.

- **Identify Risks and Opportunities**: Get insights and alerts on potential issues and review key indicators, including low account engagement, extended sales cycles, and top product offerings, using dashboards. Leverage artificial intelligence (AI) and machine learning (ML) to detect and respond to anomalies, changing market trends, and forecast shortfalls.

- **Address Gaps and Market Changes (optional)**: Revise strategies and incentives based on the latest performance and new insights. Leverage AI/ML for optimal fund allocation to incentivize new strategic focus.

- **Recognize Top Performance**: Reward top performers with monetary or nonmonetary awards. Award points based on performance. Rank achievement levels using leaderboards.
Incentive Plan to Seller Earning

**Review and Accept Incentive Plan**
Review assigned incentive plans and targets. Review assigned territories and accounts to formulate actionable plans to achieve targets. Accept the incentive plan.

**Execute Sales Motion**
Get machine learning recommendations to identify accounts with high revenue potential and win probability. Leverage AI/ML for next best actions during the sales cycle.

**Forecast Revenue and Monitor Earnings**
Get revenue forecast with estimated earnings. Review compensation updates and progress to goals.

**Resolve Disputes (optional)**
Easily create service requests for unexpected discrepancies. Track updates on any device.

**Award Compensation**
For each compensation period, sales managers review team member commission and performance ratings, allocate available discretionary pool, and sign off on individual awards using a centralized dashboard.

**Receive Earnings**
Get notification of the final award for the period and receive earnings in the designated pay period.

Product Mix: CX Sales
Popular KPIs: Cycle Time To Calculate Compensation, Time from Award to Payment, Time to Resolve Dispute,

Cloud Mobile Analytics Collaboration Big Data

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Modern Best Practice for Marketing
## Oracle Modern Best Practice

### Analytics to Insight

**Prepare analytics data**
View real-time campaign activities and progress via dashboards across segments and channels

**Perform predictive audience analytics**
Analyze audience profiles, audience segment performance, and audience behavior difference on specific channels

**Build target audience**
Validate existing profiles and identify new high audience segments

**Analyze campaigns in real-time**
Compare campaign performance of specific audiences across digital channels

**‘Learn and apply’ analytics**
Build and test campaign performance model for each audience segment and each channel

**Score campaign Segments**
Score campaign on audience segments, channels, campaign models, and Return on Investment

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Product Mix: CX Marketing
Popular KPIs: Landing Page Bounce Rate, Form Conversion Rate, Product or Service Page Conversion Rate
Insight to Campaign ROI

Prepare analytics data
Assemble prospect profitability profiles, campaign, conversion, cross-channel, and 3rd party data

Perform predictive analysis
Analyze profiles, audience segment performance, and audience behavior on specific channels

Build target audience
Validate existing profiles and identify new high audience segments

Intelligent campaign analysis
View real-time campaign activities and progress via dashboards across segments and channels

Campaign ROI analysis
Score campaign on audience segments, channels, campaign models and Return On Investment (ROI)

Product Mix: CX Marketing
Popular KPIs: Cost per Visit, Cost per Sale, Sales per Channel
Oracle Modern Best Practice

Nurture to Opportunity

- Define Nurture Strategy and Campaign Goals
  Leverage up-to-date campaign performance to inform decisions on strategies and goals. Uncover insights using graphical analysis on dashboards.

- Define Opportunity Qualification Guidelines
  Set screening criteria to identify buying intent from captured responses. Use graphical tools to lay out the sequence of tests and assignment of actions.

- Design Omnichannel Journey
  Easily lay out the target audience journey based on their preferred communication channels using graphical tools.

- Identify and Build Audience
  Identify the target audience from lists of contacts with filters based on identifying characteristics, including profile attributes and past activities. Leverage data from data aggregation or CRM systems to update the list dynamically.

- Create Personalized Campaign Assets
  Create highly relevant personalized content for the target audience by tailoring templates and building blocks from a repository to ensure content consistency with brand.

- Activate Campaigns
  Automatically check critical details, such as campaign name, start and end dates, and campaign assets before launching the campaign.

- Score and Route MQLs
  Review and identify consolidated high-quality leads by setting up rules to automatically score leads based on profiles and engagements. Transfer marketing qualified leads (MQL) to sales teams. Route leads requiring further nurturing to campaigns for additional engagement.

- Analyze Results and Optimize Campaigns
  Gain real-time insights into in-flight campaigns using a dashboard. Easily locate the activities and performance metrics specific to a campaign or asset for focused analysis and informed decision-making.

Product Mix: Customer Experience Cloud (Eloqua Marketing Automation)
Popular KPIs: time to close books, time to publish reports
Campaign Execution to Opportunity

Define Strategy and Goals
Review sales objectives and align campaign product mix, strategy, and goals. Determine target accounts and content plan. Set budget for new content development and media buying.

Generate Target List
Analyze installed base composition. Build target audience list from known contacts and automatically create audience profiles for paid media.

Build Campaign Assets
Curate campaign assets from a centralized content repository or develop new ones. Obtain recommendations on most relevant reference stories. Easily create email and landing page from brand approved templates.

Execute Campaign
Send personalize email to target contacts and launch advertising on integrated channels. Capture responses and engagement.

Monitor Campaign Results
Review crucial metrics using dashboard-driven review and identify areas for improvement.

Generate Opportunities
Evaluate account level interest by automatically aggregating interest from individuals. Automatically create opportunities on accounts meeting scoring criteria.

Product Mix: CX Marketing
Popular KPIs: No. of Emails Opened, No. of Emails Sent, No. of Emails Answered, No. of Tweet Shares, Likes, and Impressions, No. of Event Chatbot Interactions
Event Execution to Lead

**Define event**
Define the event: products, segment, schedule, location logistics, communication plan, required content, responsibilities and resources, metrics, offers

**Design event campaign**
Define digital content, collateral, promotion and social media activities for event

**Build target audience**
Purchase, generate, analyze, and segment internal and external lists

**Execute event offer**
Communicate offer via email, direct, telesales, web, social media etc. to attract potential attendees to register for an event

**Manage event registration**
Capture prospect, lead, opportunity, or customer information to register attendees for the event

**Execute event**
Perform roll out activities and manage event logistics

**Analyze event results**
Assess event results based on preset metrics such as attendee feedback, media exposure, generated leads, etc.

**Qualify and prioritize leads**
Rules-based qualification based on profile, interest, demographic and behavioral criteria. Securely share resulting qualified lead
List Import to Prospect

- **Analyze current data quality**
  Assess the current data quality of customer and prospect database

- **Define duplication handling rules**
  Designate master source for each field and determine the action (replace/add) when duplicates are found

- **Import list**
  Import prospect and customer lists from multiple sources, selecting and loading target records

- **Merge duplications**
  Identify duplicate data and process merge requests

- **Enhance prospect profile**
  Identify behavior and lifestyle data needed to complete customer and prospect profiles. Map business / party relationships

- **Maintain prospect / customer information**
  Process business / party relationships as identified

Product Mix: CX Marketing
Popular KPIs: Cost Per Contact/Attendee, Cost Per Lead/Opportunity, Number Of Trial Starts
Oracle Modern Best Practice

Data Signals to Unified Profiles

Collect Behavior Data
Monitor customers’ digital behaviors, such as website visit activities from different sources in real time, and set rules to record relevant data points in a structured common format based on business objectives.

Collect Profile Data
Establish regular feeds of customer-related data, such as account details, contact information, and potential business opportunities from online, offline, first-, second-, and third-party data sources. Automatically convert data from different sources into a common format.

Collect Transaction Data
Establish regular feeds of customer transactions and related data, including purchases, payments, and products. Set rules to automatically synchronize corresponding attributes from different sources with the repository data structure.

Collect Form Data
Receive data submitted by individuals responding to formal information requests during their online activities. Set rules to ensure each piece of data is correctly assigned to its corresponding field within the repository.

Unify Profiles
Set rules to merge duplicates, resolve inconsistencies, and incorporate new data into known profiles. Easily access repository data and set filters to focus on datasets and attributes relevant to business requirements.

Derive Intelligence
Use interactive graphical analysis to evaluate engagements, identify high-value customers, and discover the high-performing attributes of a campaign. Apply ready-to-use data science models to assist decisions, including target audience, channels, and communication tactics.

Product Mix: CX Marketing
Popular KPIs: No. of Emails Opened, No. of Emails Sent, No. of Emails Answered, No. of Tweet Shares, Likes, and Impressions, No. of Event Chatbot Interactions

Cloud Mobile Analytics Collaboration AI/ML Big Data
Modern Best Practice for Commerce
B2C: Multichannel to Omnichannel Experience

- **Link online to in-store**
  Connect the online with the physical experience, e.g. store, site, and warehouse. Integrate chat, call and social functions plus recommendations and reviews.

- **Integrate social presence**
  Integrate product catalog to social selling presence to enable direct purchasing.

- **Mobile optimization**
  Use responsive design to deliver consistent customer experience across all devices and channels.

- **Configure location services**
  Recognize opted-in customer presence and push location specific content via push message, etc.

- **Integrate clienteling**
  On-site associates deliver personalized and tailored assistance synced to the online and social sales process.

- **Handoff to customer care**
  Rules-driven automatic assignment of customer and order information to the service center.

Product Mix: CX Commerce, CX Service, CX Marketing
Popular KPIs: Visit Rate, Length of Visit, Cross-channel Conversion Rate, Cross-channel Basket Size.
Oracle Modern Best Practice

B2C: Awareness to Interaction

Create optimized web presence
Drive site traffic by boosting Search Engine Optimization from all dynamic commerce-created pages.

Provide adaptive experience
Display content based on explicit user indications (how they get to site and click behavior) and 3rd party data. Adjust experience as users move through site.

Integrated search and navigation
Tailor search results based on customer interests and provide comparison for easy decision-making. Find needed items in the fastest and most effective way.

Entice account login
Prompt visitor to login and make it easy with features like social login. Incorporate account specific benefits (loyalty program, promotion, etc.).

Apply additional personalization
Dynamically personalize experience based on visitor profile, needs, and 1st party data.

Pinpoint promotions and merchandising
Maximize value per order with targeted promotions, recommendations, and content.

Add to cart
Record product selection and quantities. Retain cart information across web and retail systems.

Product Mix: CX Commerce, CX Marketing, CX Service
Popular KPIs: Conversion Rate, Average Order Size, Time On Site, Bounce Rate

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B2C: Interest to Purchase

- **Review shopping cart**
  Summarize items in the cart with latest pricing, discount, and availability information

- **Send abandoned cart reminder (optional)**
  Entice visitors to return to complete shopping via e-mail or display ads. Offer incentives such as free shipping, discount, where-to-buy in store, etc.

- **Maximize up-/cross-sell**
  Provide intelligent offers and effective cross-and up-sell recommendations relevant to the items in the cart and 3rd party data

- **Apply promotions**
  Intelligently and Automatically apply discount codes from e-mail or ads. Make it easy to apply additional codes for other promotions

- **Offer flexible payment methods**
  Customer chooses from multiple payment methods and terms to make the payment

- **Track order**
  Provide real-time order status and details that can be viewed from multiple channels/devices

- **Share experience**
  Encourage customers to share the order to social network, rate purchase, and give feedback

- **Post-purchase interaction**
  Monitor customer online behavior and track service consumption. Set trigger to send targeted follow-up offers and communication

**Product Mix:** CX Commerce, CX Marketing, CX Service

**Popular KPIs:** Shopping cart abandonment rate, Page Views per Visit
Oracle Modern Best Practice

B2B: Multichannel to Omnichannel Experience

- **Link online to in-person**
  Connect the online with live person interactions integrating chat, call, recommendations, reviews, and feedback.

- **Mobile optimization**
  Use responsive design to deliver consistent customer experience across all devices and channels.

- **Configure location services**
  Recognize opted-in customer presence and push location specific content via push message, etc.

- **Integrate sales channels**
  Telesales, field sales, or partners deliver personalized and tailored assistance synced to the online sales process.

- **Handoff to customer care**
  Rules-driven automatic assignment of customer and order information to the service center.

Product Mix: CX Commerce, CX Marketing, CX Sales, CX Service
Popular KPIs: Visit Rate, Length of Visit, Cross-channel Conversion Rate, Cross-channel Basket Size.

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B2B: Product Search to Cart

**Search engine marketing**
Drive traffic via Search Engine Optimization to entice website visit while buyer searches online.

**Identify user**
Display relevant landing page based on search terms. Remind buyer to login for custom catalog, price list, etc.

**Personalize online visit**
Apply pre-negotiated price to users under contract. Deploy responsive design for optimal viewing on all devices. Assist with live-chat or call throughout visit.

**Locate intended products**
Reach high relevancy results with advanced search and navigation. Pinpoint intended items with detailed attributes and rich product and service data, including technical specs, drawings, or warranty coverage.

**Configure product and service offering (optional)**
Guide configuration via pre-defined rules. Display pricing impact and cross/up-sell suggestions based on selections.

**Manage cart**
Add items to cart from current session or saved list. Allow splitting lines into different shipments, locations, or payment methods.
B2B: Cart to Agreement

**Finalize cart**
Summarize shopping cart with default or pre-negotiated pricing and terms. Route approval request though buyer organization via workflow.

**Negotiate pricing and terms**
Conduct negotiation via live-chat, phone, or in-person meeting. Maintain change and approval history online.

**Handle request for quote**
Request quote for items in cart. Initiate discussion online or by phone. Identify follow-up actions such as product demo or in-person appointment.

**Finalize purchase**
Finalize pricing, delivery methods, financial terms, and applicable service options. Pay by PO, invoice, or credit.

**Respond to quote request**
Sales prepare proposal and obtain necessary approval based on preset workflow policy. Share response with buyer online.

**Post purchase communication**
Update order fulfillment and applicable service activation status. View and pay invoices. Handoff to Service Center.

Product Mix: CX Commerce, CX Sales, CX Service
Popular KPIs: Shopping Cart Abandonment Rate, Pageviews Per Visit

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Modern Best Practice for Service
Monitor status
Receive alerts from devices or predictive analytics via remote service dashboard. Allow manual initiation of investigation based on observation. Notify Service Manager

Perform diagnosis and analysis
Confirm issue, investigate causes, and determine severity via remote diagnosis. Adjust predictive model based on root cause analysis

Identify solution
Check knowledge base or collaborate with engineers for applicable fixes. Determine necessity of field dispatch

Perform remote service
Schedule remote service according to customer SLA. Confirm service timing before applying fixes. Execute service tasks and send results to customers. Request field dispatch if needed

Perform on-site service (optional)
Ensure availability of qualified technician and required material. Re-prioritize field technician work queue if needed. Confirm visit timing and perform fixes

Customer care follow-up
Update asset registry and customer records. Update customers of results and survey service experience
Customer Sentiment to Preventive Maintenance

Analyze customer sentiment
Monitor negative sentiment on social media, web, email, phone, and text for potential product/service issues

Evaluate installed customer base impact
Identify all customers of the products and/or services in question. Prioritize focus areas based on severity and SLA. Notify associated service managers

Confirm issue
Confirm asset issues by analyzing data stream from the customer devices. Check knowledge base for solution

Perform remote service
Schedule the remote service according to the SLA. Confirm service timing before applying fixes. Execute service tasks and send results to the customers. Request field dispatch, if needed

Schedule on-site visit
Dispatch field technicians for on-site service or account managers to ensure customer satisfaction

Customer care follow-up
Update asset registries and customer records. Notify the customers of service results. As appropriate, post update to relevant social media and other communication channels

Product Mix: CX Service
Popular KPIs: , Mean Time To Repair (MTTR), Mean Time Between Failure (MTBF), Overall Equipment Effectiveness (OEE)
Oracle Modern Best Practice

Social Listening to Resolution

- **Monitor communication channels**: Capture customer contact via blogs, forums or other social media. Flag incidents requiring responses
- **Match social profile to customer record**: Determine service entitlement and set response time expectations
- **Identify solution**: Research internal and external available resources for customer inquiries
- **Respond to complaint**: Provide / apply the solution to appropriate social media channels and collect feedback
- **Update customer record**: Link incident to customer profile and note down feedback and comment
- **Update knowledge**: Automatic incorporation of new information into knowledge repository

**Product Mix: CX Service**
- Popular KPIs: Mean Time To Repair (MTTR), Mean Time Between Failure (MTBF), Number of Automated

Cloud Mobile Analytics Collaboration Big Data
Customer Contact to Resolution

**Capture Initial Contact**
Leverage a designated portal for customers to find solutions. Enable customer contact through email, phone, web, chat, or social media.

**Unify Customer Information**
Provide service agents with a complete view of detailed customer data consolidated automatically over multiple channels. Automatically create reference numbers for personalized interaction and service.

**Identify Solutions**
Quickly identify answers using a knowledge repository with easy access and powerful search capabilities. Transfer inquiries to expert staff if needed.

**Deliver Solutions**
Provide consistent solutions over customer-preferred communication channels, including phone, email, or chat.

**Enhance Knowledge (optional)**
Suggest new content or modifications to the knowledge repository based on insights from customer interaction.

**Confirm Resolutions and Solicit Feedback**
Recap customer interactions and resolutions. Close incidents. Automatically send confirmation email and invite customers to provide feedback.

**Track Service Costs (optional)**
Record service usage against applicable subscriptions and track incurred charges.

Product Mix: CX Service
Popular KPIs: No. of Escalations, No. of Incidents Created, Cost/Incident

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**Service Request to Dispatch**

- **Receive service request**: Monitor service requests from all channels (social, etc.) for optimal routing and field technician assignment.
- **Manage service schedule**: Set priorities and assign engineer to perform repair. Identify repair schedule.
- **Perform repair**: Visit customer, inspect the item, and perform required fixes.
- **Record part usage**: Report parts used for the on-site repairs and sync inventory status.
- **Create service order**: Enter order for service rendered, check applicable subscription coverage, and settle any service charges.
- **Close service request**: Record customer confirmation.

**Product Mix: CX Service**
- Popular KPIs: Mean Time Between Failure (MTBF)

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Oracle Modern Best Practice

Knowledge Gap to Solution

**Analyze Knowledge Effectiveness**
Dashboard review of customer interactions and proposed solutions to identify emerging trends and behavior patterns

**Identify Knowledge Gap**
Identify content needed to address top issues in first contact and experts for content creation

**Author Knowledge**
Add / update content for new solutions. Tailor solutions (videos, FAQs, etc.) for different communication channels

**Measure Performance**
Refine content based on KPIs to improve usage and customer experience

Product Mix: CX Service
Popular KPIs: Overall Equipment Effectiveness (OEE), Planned Maintenance Percentage

Cloud Mobile Analytics Collaboration Big Data

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