

Success Planning with Oracle Cloud Advanced Services Customer Success Manager

What to Expect: A Guide to Your Voyage



ORACLE®

Planning Your Voyage

Leveraging all the opportunities SaaS has to offer requires a steady hand at the wheel. Your experienced Customer Success Manager will work with you to help ensure all your desired business outcomes are met throughout your Oracle Cloud voyage. With Value Realization as a cornerstone, we'll target, track and measure business outcomes while driving adoption, engagement, and advocacy.

Part one of your journey begins with our comprehensive Kickoff and Discovery processes.



Kickoff:

Your Customer Success Manager will:

- Align resources across Oracle
- Establish measurement of business outcomes
- Govern KPIs
- Establish communication and promotion of value
- Implement adoption management
- Initiate best practice and guided implementation

Discovery:

Once the planning stage is complete, your Customer Success Manager will:

- Identify benefit drivers
- Make recommendations and suggest KPIs
- Define and agree on next steps
- Identify working cadence and map next steps in your voyage

Find out more: check out our in-depth guide to [Success Planning](#) →

“ The success plan really opened our eyes to some possibilities that we had not ever considered or given thought to in a very long time. We ended up with some very tangible, bite-sized ways to improve our productivity and get more ROI from our solution. Several of the recommendations were easy to implement and we were able to see an immediate benefit and we are very anxious to get the others rolled out! ”

Erin McAnally VP,
Marketing RamQuest, Inc.

2 Charting Your Course

Your Success Plan is your comprehensive map of your Oracle Cloud voyage, there to guide you every step of the way.



3 Keeping Your True North

Your Customer Success Manager will report back regularly with Quarterly Business Reviews and Progress reports, keeping you on track with your true north journey to success.

Executive Summary

1 Vision > THE WHERE

- The Company has consistently reduced operating costs over the last few years while aggressively pursuing mergers and acquisitions. The Company would like to continue reducing operating costs.
- The Company wants to continue to automate functions to better control variable costs.
- The Company constantly performs 'lean exercises' where it identifies potential efficiencies and then implements change.

2 Starting State > THE WHAT

- The Company performs a significant amount of allocations in its General Ledger daily during the planning process which creates inefficiencies.
- The recent account reconciliations on-premise solution has been relatively successful; however, it lacks transaction matching.
- The Company spent a significant amount of time validating and re-validating data used in planning and the close.
- The Company has numerous best of breed systems that feed each other. Data management is handled by data warehouses and hubs and through integrations between disparate systems.

3 Recommendations > THE HOW

- Eliminate the need to perform allocations within the GL during the planning process and create significant efficiencies.
- Single Data Model eliminates the need for many integrations and moves back and fourth from the unrelated systems.
- Tracking the workflow during the close would allow for a more effective close.
- Utilize transaction matching for account recommendations.

4 Results > THE WHY

- Implementing Oracle Cloud solutions could:
- Neutral run cost transition moving to a cloud financial system.
- Improve Planning and Budgeting efficiencies by **25%** or over **\$2 M annually** by automating allocations in the planning process.
- Increase efficiencies already established by **~\$300 K annually** in account reconciliations by automating transaction matching.



Thank you!

For more information contact:

Jeremy Barsamian | Senior Director, Customer Advanced Success Services

jeremy.barsamian@oracle.com

oracle.com/assets/advanced-customer-success-services-4921133.pdf →

