

**SIEBEL**  
CUSTOMER RELATIONSHIP  
MANAGEMENT

# SIEBEL CUSTOMER ORDER MANAGEMENT - SIEBEL PROMOTION GROUPS

COMMUNITY-SERVICES BASED  
PROMOTIONS

**KEY FEATURES**

- Promotion Groups Core- Administration
- Promotion Groups Core – Run Time
- Promotion Groups - Pricing
- Promotion Groups – Access Control
- Promotion Groups - Notification
- Promotion Groups - Validations

**KEY BENEFITS**

- Increase average revenue per subscriber
  - Consolidate customer services with convergent offers
  - Secure additional recurring revenue with membership fees and commitments
  - Increase market share with family packages and community-of-interest offers
- Improve subscriber experience and satisfaction
  - Introduce new and innovative offers to the market
  - Increase customer loyalty with rewards and pricing adjustments
  - Enforce membership management policies with access control rules
- Improve operational efficiency and cost to serve
  - Decrease time to market with reduced need for customization
  - Simplify sales and support with built-in subscription management functionality
  - Ensure order right first time with extended compatibility and validation rules

**RELATED PRODUCTS**

Following products are available from Oracle and enable companies to further enhance their Quote and Order Capture Processes:

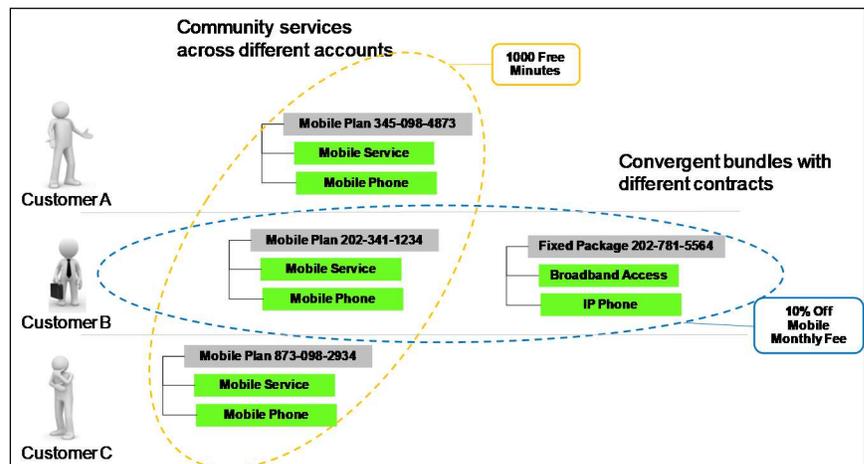
- Siebel Sales

*Siebel promotion groups allow Communications Service Providers to differentiate more from their competition by enabling closed user groups or community-of-interest services to grow customer and market share. A promotion group can apply to any set of individuals including a company, an organization, or a family.*

**Concepts**

One of the key requirements for Communication Service Providers is to allow existing services with contracts to participate in new contracts or offerings without affecting existing contracts. By participating in community offerings with their existing services, participants receive rewards such as special pricing on calls to community participants. Participants may have to pay one-time or recurring fees to participate for joining the community.

Promotion Groups, a new entity, provides the ability to re-use existing customer assets (e.g. a mobile service, -) in new community offerings by making the asset a member of a Promotion Group. The notion of membership is essential in Promotion Groups.



In the example above, three customers are subscribed to Mobile plans. Customer B has subscribed to a fixed package also. Promotion groups allows CSPs to define a community offering, say, to create a soccer team group, which goes across customers A,B and C so that they can share rewards such as 1000 free minutes. Promotion groups can also be used to group different assets/services of a given customer. For example, grouping Mobile and Fixed Plans for customer B so that he gets a 10 % off mobile monthly fee.

- Siebel Service
- Siebel Marketing
- Siebel Analytics
- Siebel Configurator Runtime
- Siebel Dynamic Pricer
- Siebel Quotes and Order Capture
- Siebel Customer Order Management Administration Server

## Integrated Administration

Creation and maintenance of Promotion Groups and related objects is part of Siebel Product Administration. It leverages and extends the Bundle Promotions concepts and functionality (e.g. commitments, pricing adjustments)

## Memberships

Memberships define the association between a Promotion Group and customer services (Assets). Different Memberships may have different roles and privileges in a Promotion Group Membership. Domains restrict the products/services that can be associated to a membership.

## Order Capture

The order capture functionality has been enriched to support quotes and orders containing Promotion Groups. A new quote/order view enables call center agents to associate existing or new assets to promotion group memberships. The Asset-based Ordering (ABO) flows have been extended to support promotion group-related processes.

The screenshot displays the Siebel CRM 'Sales Order' form for order number 296-117832690. The form includes several tabs: 'Revised', 'Verify', 'Select Favorites', 'Drop Order', 'Submit', 'Get Status', 'Generate Activity Filter', and 'Cancel Order'. Below the tabs, there are fields for Order #, Account, Status, and Price List. The main section is divided into three panes:

- Line Items:** A table listing 10 items with columns for Line #, Product, Qty, Promotion Group, Owner Account, Billing Account, and Service Account. Items include 'Community Package', 'Community Leader', 'Free 1000 Minutes', 'Gold Participant', 'Silver Participant', 'Nation 800 Minutes', 'Wireless Service', '100 Award Credits', 'Daytech 400', and 'Nation 500 Minutes'.
- Asset List:** A table showing assets associated with the order, including 'Nation 800 Mi.' with service ID '3015331711'.
- Promotion Group Definition:** A table defining memberships for the promotion group, with columns for Membership, Product, Product Line, Class, Max, and Min. It lists memberships for 'Community Le...', 'Silver Partic...', 'Gold Partic...', and 'Reward Camp...'.

At the bottom, there is an 'Associated Member' section with a table showing account, product, and service details.

## Group Management

Promotion Groups instances are automatically stored as assets and they can evolve over time as members are added or disconnected. Runtime flows can be top-down (e.g. promotion group owner can add or delete a member to a group) or bottom-up (e.g. a member requests to be added to a group). New views have been added for order capture both top-down and bottom-up runtime flows.

## Pricing and Commitments

Commitments and early termination charges can be defined for both Promotion Groups and Memberships. Promotion Groups and Memberships can have one-time or recurring fees. Price adjustments can be defined for assets associated to promotion groups at any level in the asset structure.

## Notifications

Notifications can be defined to be sent on events like ‘Member Added’ or ‘Member Disconnected’. Only the notification definition is provided, execution is left to customers, based on their privacy and communication preferences policies and systems.

## Validation

The Eligibility and Compatibility (E&C) framework supports both Promotion Groups and Memberships. In addition, it has been enhanced to define compatibility between the assets associated to a promotion group instance. Validation rules have been added to enforce commonality or uniqueness of attributes across members of a promotion group (e.g. all billing accounts must be different)

## Access Control

The memberships of a promotion group can have different access control, which gives their members different access rights for the ongoing group management. For example, a ‘Gold Membership’ gives its members all access rights (add, modify or remove all members), whereas a ‘Bronze Memberships’ allows its members only to disconnect their membership. Access Control rules are enforced at runtime in the top-down and bottom-up user interfaces.

## Task based UI

Seeded Task-based User Interface are available to create a new promotion group from a promotion group definition and subscribe members to that promotion group by associating existing assets with the promotion group memberships. For more information about promotion groups and their components,

For more information, refer to [About Promotion Groups](#) bookshelf.

## Contact Us

For more information about Siebel CRM, visit [oracle.com](http://oracle.com) or call +1.800.ORACLE1 to speak to an Oracle representative.



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