ORACLE DATA SHEET

SIEBEL CRM DESKTOP

By providing critical sales and service data within the applications that knowledge workers are already using, Siebel CRM Desktop improves access to timely information and increases adoption throughout the organization. Siebel CRM Desktop sets the standard for providing users access to CRM data within the context of the desktop productivity applications—such as Microsoft Outlook and IBM Notes—they use most frequently.

KEY FEATURES

- Seamless integration between Microsoft Outlook / IBM Notes and Siebel CRM
- CRM data validation at the user's desktop
- Relate PIM data to CRM data without leaving the desktop

KEY BENEFITS

- Increase user adoption through access to CRM data on the desktop
- Reduce user training
- Gain offline access to CRM data

Drive User Adoption

With Siebel CRM Desktop, organizations can dramatically increase adoption by giving users access to the critical CRM data within the productivity applications they already use most frequently. Because they inherently update the CRM application simply by maintaining their data, critical information within CRM applications is quickly and easily updated since this data is available in applications that users are already accessing throughout the day.

Leverage Shared Data Synchronization

Siebel CRM Desktop allows users to maintain a single calendar, task, and contact list in their productivity application and have it synchronized with the CRM application. This sharing approach allows users to work in a familiar environment while capturing important customer interactions and synchronizing information into the common Siebel CRM database.

The synchronization process of this data takes into account CRM validation rules such as required fields, constrained pick lists, and security rules. This customizable set of rules ensures that data will synchronize successfully, even in highly configured CRM environments.

Add Critical Context to Data

Siebel CRM Desktop goes beyond the capabilities of a simple synchronization solution. It allows users to relate Personal Information Manager (PIM) data to CRM data from inside the desktop client. This capability gives context to PIM data in the CRM application.

Examples include (but are not limited to):

- When working with an appointment, the user can associate it to a CRM Account, Opportunity, or Service Request as an activity, allowing sales and service team members and management to see customer touch points throughout the customer life cycle, from pre-sales through on-going service.

- When creating a calendar item, any invitee will automatically be added to the contact or employee list for the related CRM activity.
- Users may relate an inbound or outbound email to a particular customer account, sales opportunity, service request, or any other syncing object. The user can also set up automatic associations of all inbound and outbound email for a given contact or customer account.

Maintain CRM Data in Desktop Productivity Applications

Siebel CRM Desktop provides CRM business logic, including availability of custom fields and enforcement of validation rules (required fields, pick lists, calculated fields, etc.) within the PIM application.

Providing validation at the time of data entry ensures that users are notified immediately of any validation issues, which helps ensure they can address them quickly.

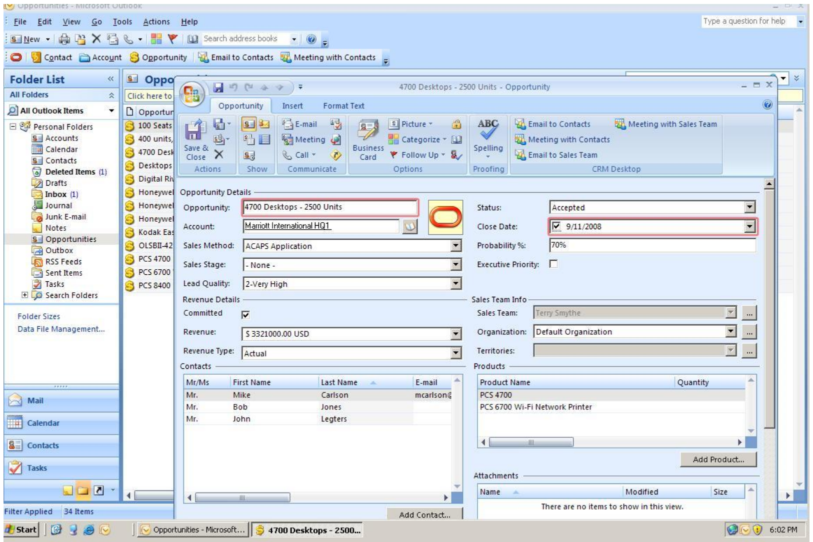

Figure 1: Maintain CRM Data in Microsoft Outlook

Offline Capability

All functions available in Siebel CRM Desktop are available to users regardless of whether they are online or offline. Any changes made in their desktop productivity application are maintained regardless of whether there is immediate access to the CRM application. When users reconnect, any data updated on the client are uploaded to the server and vice versa. Any conflicts are reported to the user, who can determine the appropriate resolution.

Improved Quality of Training

Since users are already familiar with navigation, search, data entry, and other features of their desktop productivity application, organizations can allocate valuable training time on topics vital to the success of the CRM implementation, such as how individual opportunity status information feeds overall sales pipeline forecast through the back office to support and manufacturing or the importance of accurately managing parts inventory or tracking time and expense information during a service call.

CONTACT US

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