Oracle Engagement Cloud

Building deep and lasting **customer relationships**, especially for high-value or high-touch accounts, is a complex art form. Survival hinges first on winning those high-value deals, and then growing and retaining accounts as customers. That's a difficult task if the data for each customer touchpoint isn't **unified** from the beginning.

Oracle Engagement Cloud provides a comprehensive set of capabilities to help sales leaders transition smoothly from sales planning and execution through customer onboarding, account management and support services. Robust sales and service capabilities are **built on a single platform**, with easy mobile access and native AI that predicts each account's win probability and recommended next best actions.

Empower everyone in your organization – including partners and channel reps – with contextual tools to win and retain more business.

ORACLE ENGAGEMENT CLOUD:

- **Complete:** A comprehensive sales solution focused on driving performance and connecting business processes.

- **Innovative:** Productivity-driven apps offering deep customer insight with the flexibility to adapt and differentiate.

- **Proven:** Power global sales organizations and leverage recognized industry expertise for secure and scalable global operations.

SALES FOUNDATION

It's time to move beyond core sales force automation. It's time to manage the entire sales lifecycle, including leads, accounts, contacts, opportunities, assets, activities and assessments. For reps and managers, on mobile or web, these capabilities simplify how to track, advance and ultimately win the most opportune deals. Sales Foundation helps sales teams to:

- **Know the Customer**: Customer 360 consolidates and presents critical customer information.

- **Be Decisive:** Assessments keep focus on the most qualified leads, and identify opportunity risks.

- **Give and Get Help**: Sales Coach offers tasks lists and recommended actions at every stage.

- **Find Content Fast:** Sales Lightbox enables content sharing and custom presentation assembly.

- **Stay Productive:** Tools to manage appointments or tasks, log call notes, send a recap, assign follow-up and more.

- **Track Deal Progress**: Deal Calendar provides a consolidated account activity timeline.

- **Analyze Team Performance**: Pre-built reports analyze performance for better resource allocation.

- **Trust the Forecast:** Embedded analytics deliver intelligent sales forecasts for accurate planning.

- **Campaign Aggressively:** Leverage target lists, email templates and integrated lead conversion.

UPGRADE WITH ADVANCED ADAPTIVE INTELLIGENCE FOR SALES

Add on Adaptive Intelligence applications and bots to enhance every single engagement. Oracle offers the most advanced AI for Sales, operating pervasively at the platform level. It's intelligent, frictionless and connected to key business data across the organization.

- **Guide Sales Motions.** View prescriptive recommendations for next best actions, product configurations and more.

- **Spot Risk Early.** Understand when deals are at risk and improve forecast accuracy.

- **Voice-Controlled Assistance:** Oracle Digital Assistant for Sales provides 24/7 access to sales and customer intelligence with voice-controlled CRM updates, all accessible hands free and on-the-go.

SALES PERFORMANCE MANAGEMENT

Become more flexible, accountable and responsive. Help reps onboard faster and stay motivated with advanced incentive compensation, quota and territory management tools that help managers and sales operations align individual sales rep goals with overall sales strategy.

- **Free Up Time and Unleash Potential.** Reinforce training with Sales Coach, share content with Sales Lightbox, and maintain focus on high revenue potential accounts with White Space Analysis.

- **Deploy Incentives that Work.** Roll out new plans efficiently, enable reps to track their progress, and recognize top performers with non-cash incentives and gamification.

- **Optimize Sales Coverage.** Powerful "what if" analysis to conquer complex territory planning.

- **Make Quotas Make Sense.** Deliver fair and equitable quotas backed by detailed sales intelligence.

- **Coach in Real-Time.** Identify top performers, develop "B players" and reach team goals.

CUSTOMER DATA MANAGEMENT

With Customer Data Management, come to rely on customer data that's accurate and complete. Manage accounts more effectively, reduce duplicated work streams, run more effective marketing and sales campaigns. Resolve customer service issues quickly and completely, and look for opportunities to upsell and cross-sell with confidence.

- **Strengthen the Source of Truth.** Build a single consistent, accurate customer profile with pre-built source hierarchy and cross-referencing components that link and merge disparate data.

- **Increase Agility.** Catch duplicates, verify addresses in batch and real-time, and enable contact and account matching during data import.

- **Enrich Data**. Reach more prospects with help from third-party data including millions of companies, contacts and social media profiles with Oracle Data as a Service (DaaS) for Sales.

- **Keep It Clean.** Leverage embedded data quality management foundations and tools for sales, marketing and service organizations for clean data throughout the complete customer lifecycle.

PARTNER RELATIONSHIP MANAGEMENT

Scale sales and grow your customer base by empowering channel managers and partners to perform better with tools that will help them:

- **Monitor Progress and Performance.** A configurable dashboard provides a consolidated view of KPIs, open opportunities, pipeline, deal registrations, incentives and market development funds.

- **Plan and Execute Channel Sales.** Deploy automatic rules-based lead assignment, tools to qualify, claim, convert and approve registrations and program planning tools for quick wins.

- **Administer Partners and Programs Holistically.** Make deal data and support features accessible in a consolidated, tablet-friendly, branded Partner Portal.

- **Integrate Service Seamlessly.** Submit service requests on behalf of customers, and channel managers can view and help resolve partner or service requests quickly.

- **Manage from Mobile.** View, approve, reject or return deal registrations, manage service requests, monitor the approval process, and contact partner contacts directly from the enterprise mobile app.

CONFIGURE PRICE QUOTE FOR SALES

Direct integration to Oracle CPQ Cloud helps you sell more, sell faster and sell anywhere. Mitigate complex technical and process challenges to find the best product for the customer, price it attractively and present a professional quote with ease.

- **Configure to Personalize.** Re-usable rules and easy-to understand screens ensure every offer is 100 percent accurate and validated, with less training and fewer sales bottlenecks.

- **Price Dynamically.** Remove guesswork and support multiple price books, discretionary discounting, localizations, seasonality, promotions, channel pricing, multi-tier pricing and more.

- **Quote Quickly and Accurately.** Automate proposal creation, route revision reviews, approvals and signatures, and highlight the latest changes – all within the selected language and document format.

SERVICE FOUNDATION

Transition smoothly from sales to customer relationship management as well as service engagements with a shared 360 customer view, omnichannel communication, agent productivity tools, robust incident routing and assignments.

Service Foundation tools help to:

- **Manage Service Requests.** Track requests and associated notes and activities as they traverse channels. Compose rich text responses with personalized and branded content.

- **Communicate on the Customer's Terms.** Resolve issues through whichever channel the customer prefers, including email, telephony integration, co-browse, live chat and social channels. Manage multiple cases at once.

- **Amplify Agent Productivity**. Help them work faster and smarter with keyboard shortcuts, pre-built call flows and user dashboards that paint a complete picture of each customer.

- **Route and Assign.** Support effective workload management with smart omnichannel routing and queuing that accounts for individual agent presence, KPIs and capacity.

- **Empower with Knowledge.** Resolve customer issues faster with accurate and consistent responses surfaced in context of each service request and through natural language search.

DIGITAL CUSTOMER SERVICE

Extend and customize the service experience for customers who prefer digital channels – from websites and email messages to online chat.

- **WYSIWYG All the Way.** Use prebuilt and extensible themes to personalize for any business. Deploy a fully customized website design for self-service in days rather than weeks.

- **Strengthen Self Service.** Equip customers to create a unique account, search and view knowledge articles, as well as create, view and edit service requests. After self-registering, customers can seek support and manage requests on their service portal, designed and branded specifically for them.

UNIFY THE CUSTOMER EXPERIENCE ACROSS EVERY TOUCHPOINT

Oracle Engagement Cloud is designed with connections in mind. It comes built with core cross CX capabilities embedded that make it easy to connect sales and service throughout the entire customer journey. The benefits of a unified experience include:

- **Hand Off Leads Seamlessly.** Access MQLs in real time, intelligent lead scoring, contextual lead engagement and prospects' digital footprints with built-in Oracle Marketing Cloud integration.

- **Configure Subscriptions.** Manage subscription quotes and renewals through CPQ integration, empower customers to subscribe through self-service via Commerce Cloud, and finalize revenue recognition, fulfillment and invoicing with ERP integration.

- **Simplify Contracting.** Review, approve and red-line contracts and quickly understand deviations.

- **Guide Customers and Agents to Answers.** Create new interviews or customize out-of-the-box Oracle Policy Automation interviews within Engagement Cloud to analyze and better serve customer needs.

- **Extend Service to the Field.** Connect with Oracle Field Service Cloud to provide customers with technician availability and book a field service visit right away and confirm via whichever channel the customer prefers.

ADVANCED SALES PLANNING

Optimize sales and financial plans in unison, drawing on the power of intelligent machine learning. Upgrade your Oracle Engagement Cloud deployment with Oracle Sales Planning Cloud.

- **Deliver Reliable Forecasts.** Powerful machine learning generates intelligent predictions and improves accuracy.

- **Connect Sales and Finance.** Leverage historical order data via ERP integration to support data-driven scenario planning.

- **Evaluate Quota Scenarios.** Allocate quotas top down, organization-wide or work with reps to assess proposed, collaborative quotas. Modify quota when you anticipate new risks.

- **Make It Familiar.** Access sales planning in familiar spreadsheet or presentation formats.

- **Plan Faster.** Centralize and automate planning allowing for faster implementation in to the field.

ENGAGEMENT CLOUD IS HARD AT WORK

Oracle customers across industries across the globe turn to Engagement Cloud to support more intelligent, more intuitive and more connected sales and service. Here's how Oracle can help your industry:

- **Automotive.** Acquire all the right customers with digital customer acquisition; empower dealers with AI-powered sales; and proactively serve customers with predictive connected vehicle care and vehicle data monetization.

- **Communications.** Deliver personalized, contextual engagements informed by digital behavior and AI-driven super agents. Enable new journeys from Social-to-Cash-to-Care.

- **Consumer Goods.** Grow revenue and engagement with seamless omnichannel engagement and improve profitability, whether for B2B or B2C scenarios.

- **Retail Banking.** Offer open, customer-centric digital banking and get smarter about customer acquisition. Perfect omnichannel interactions and introduce new ecosystem business models.

- **Corporate Banking.** Super-charge relationship managers with AI-powered front office tools and personalize customer engagement with account-based marketing and service support.

- **Insurance.** Improve performance by motivating employees, brokers and channel representatives. Delight customers with integrated onboarding, underwriting and claims management.

- **Securities, Investments and Wealth Management.** Eliminate errors and increase inefficiencies with integrated tools to guide customers from origin through onboarding.

- **High-Tech Manufacturing.** Generate new revenue and improve profitability with product-as-a-service offerings sold and supported on a complete CX platform.

- **Hospitality.** Raise productivity and sales effectiveness, and then deliver smarter, streamlined guest services across any channel.

CONNECT WITH US

For more information about Oracle Engagement Cloud, visit cloud.oracle.com/engagement-cloud, take a Quick Tour or call +1.800.ORACLE1 to speak to an Oracle representative.

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