ORACLE

Siebel CRM Strategy & Customer Success for Public Sector

Sirisha Bansal

Principal Product Manager

Siebel CRM

September, 2020

Safe harbor statement

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. The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.

Sirisha Bansal

Principal Product Manager
Oracle Siebel CRM

✉ **sirisha.dinavahi@oracle.com**

Presenters

Roy Thomas

Senior Manager, Solution Delivery

Transfer Payment Ontario Branch

Vincent Mathias

Development Manager

Land and Resources Cluster of
Ontario Public Services

Tariq Hasan

Senior Manager, Enterprise
Solutions

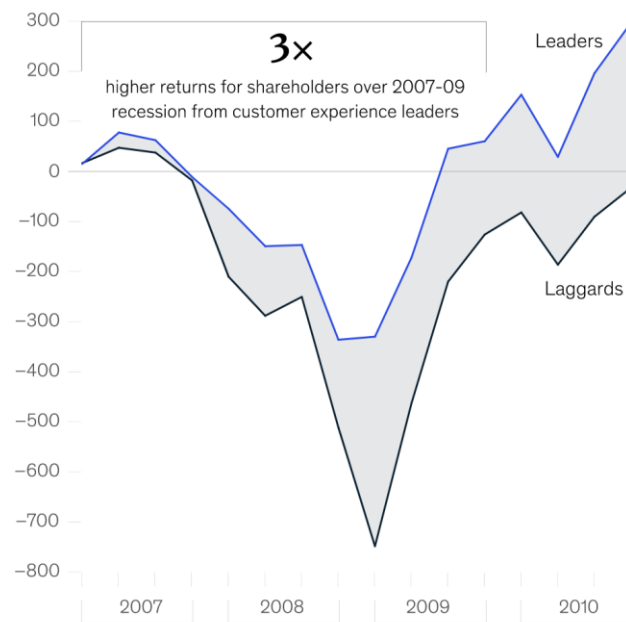Land and Resources Cluster of
Ontario Public Services

Adam Sikora

Senior Manager, Enterprise
Solutions

Land and Resources Cluster of
Ontario Public Services

Customer Experience: Key Driver post COVID world

Total returns to shareholders of customer experience leaders and laggards,[1] % by quarter

3×

higher returns for shareholders over 2007-09 recession from customer experience leaders

Leaders

Laggards

300
200
100
0
−100
−200
−300
−400
−500
−600
−700
−800

2007   2008   2009   2010

[1]Comparison of total returns to shareholders for publicly traded companies ranking in the top 10 or bottom 10 of Forrester's Customer Experience Performance Index in 2007–09.
Source: Forrester Customer Experience Performance Index (2007–09); press search

Focus on care and concern

- Reach out, but with support, not marketing

- Make a priority of employees and community

- Stay true to company purpose and values

Meet your customers where they are

- Innovate digital models to help customers weather the crisis safely from home

- Expand home delivery options

- Consider contactless operations

Reimagine the post-COVID-19 world

- Economic hard times will force cost cuts

- Migrate customers to digital channels to save money and boost satisfaction

- Brick and mortar stores may look very different post-crisis

Build agile capabilities for fluid times

- Tap social media, not surveys, for quick customer readings

- Solicit employees for ear-to-the-ground insights

- Save time with "test and scale" labs

- Pay attention to "failure modes" indicating that you've missed customer signals

McKinsey & Company

Adapting customer experience in the time of coronavirus – McKinsey Insights
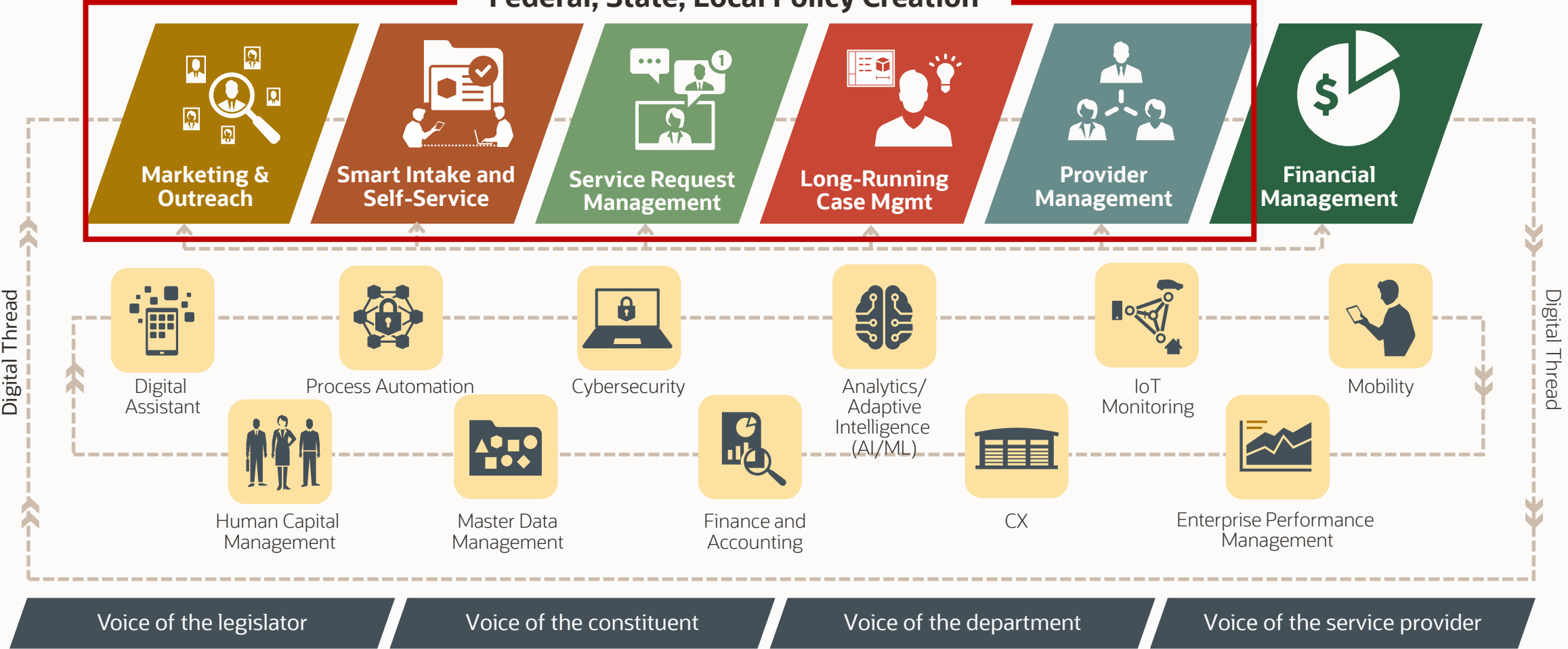
Siebel CRM: Integrated offering across Public Sector CX value chain

Marketing	Sales		Orders	Partner Relations		Service & Contact Center			Retention & Loyalty
Planning & Budgeting	Opportunity Management	Product Administration	Order Mgmt.	Partner Recruitment & Onboarding	Partner Locator	Service Channels - Email	Assignment Management	Barcode	Loyalty Program Mgmt.
Program Design	Account Management	Price Administration	Catalog Mgmt.	Partner Programs	Customer Service Request Mgmt.	Service Channels - Chat	Service Request Management	Inventory Management	Membership Mgmt.
Offers & Treatments	Contact Management	Leads Management	Bulk Orders	Content Management	Solutions & Problem Resolution	Service Channels - Phone	Asset Management	Cycle Counting	Promotions Mgmt.
Campaign Mgmt. & Orchestration	Account Planning	Sales Planning	Bundled Products	Partner 360 Degree Profile	Inventory & Assets	Service Channels - Partner	Scheduling	Repairs Management	Accrual Processing (Real Time)
Managing Lists	Forecasting	Sales Mobile	Asset-based Ordering	Strategic Business Planning	Field Service Scheduling	Service Channels – Self Service	Service Mobile	Fulfillment	Redemption Processing
Creating & Using Leads	Revenues	Proposal & Presentations	Credit-Checks	Deal & Design Registration	Warranty Management	Service Channels - Social	Service Order Management	Siebel Comm. Panel	Tiered Model
Social / Web Marketing	List Management	Incentive Comp. Mgmt.	Shipping & Tax	Special Pricing Authorization	Marketing Programs	Agreements & Entitlements	Depot Repair	Common User Interface	Gamification
Segmentation	Territory Management	Quota Mgmt.	Product Recommendations	Forecasting	MDF	Warranty Administration	Charges & Invoices	CTI	Partner Management
Marketing Analytics	Quotes	Sales Analytics	Distribute Orders Orchestration	Account, Contact & Opportunity Mgmt.	Marketing Literature Distribution	Knowledge Management	Preventive Maintenance	Siebel Chat & Email Response	Loyalty Analytics

Common Components			
	Rules / Policy Automation	Interactive Application Help	360 degree Dashboards
	Knowledge Management	CalDAV	Workflows
	Reports / BI Publisher	Charts	Wizard-like Task Flows
	OBIEE	Search	Guided Data Entry (Smart Script)

Industry Components			
	Case Management	Need Analysis	Service Provider Portal
	Leads & Subjects	Eligibility Analysis	Citizen Self Service
	Evidence, Circumstances, Arrests	Benefit Plan	Citizen 360
	Investigative Analytics	Policies	Decision Science (BI)

Oracle Public Sector Solutions

Federal, State, Local Policy Creation

Marketing & Outreach	Smart Intake and Self-Service	Service Request Management	Long-Running Case Mgmt	Provider Management	Financial Management

Digital Thread

Digital Thread

Digital Assistant

Process Automation

Cybersecurity

Analytics/ Adaptive Intelligence (AI/ML)

IoT Monitoring

Mobility

Human Capital Management

Master Data Management

Finance and Accounting

CX

Enterprise Performance Management

Voice of the legislator

Voice of the constituent

Voice of the department

Voice of the service provider

Customer Success

Transfer Payments Ontario Branch, Ministry of Government and Consumer Services

Transfer Payments Ontario

Delivering a citizen-centered and digital first user experience using Siebel CRM

Ontario

Background

- Our team
- Our technology
- Our users

Our team

Administrators of Transfer Payments Ontario, an enterprise case management solution for transfer payment programs across Ontario

Proven technology that enables the province to provide funding to stakeholders to deliver services to the citizens of Ontario

Reduce administrative burden

Improve government services
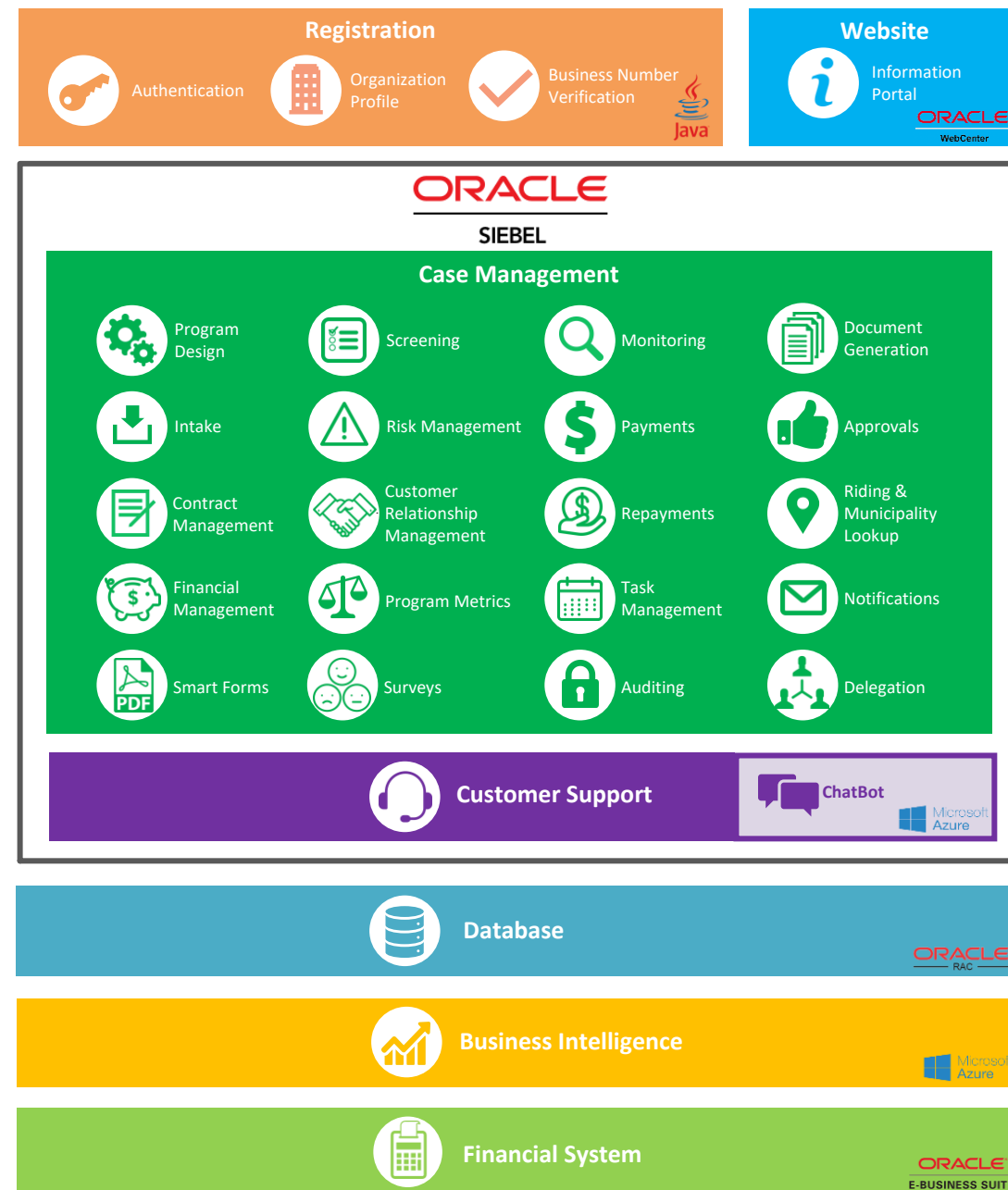
Measure program outcomes

Deliver data insights

Ontario

Our technology

End-to-end, integrated solution

- Self service, external Portal

- Third-party partner, evaluator portal

- Internal staff administration portal

- Integration with enterprise authentication and financial systems

~16K # of users

Registration
- Authentication
- Organization Profile
- Business Number Verification

Java

Website
- Information Portal

ORACLE WebCenter

ORACLE
SIEBEL

Case Management

Program Design	Screening	Monitoring	Document Generation
Intake	Risk Management	Payments	Approvals
Contract Management	Customer Relationship Management	Repayments	Riding & Municipality Lookup
Financial Management	Program Metrics	Task Management	Notifications
Smart Forms	Surveys	Auditing	Delegation

Customer Support   ChatBot   Microsoft Azure

Database   ORACLE RAC

Business Intelligence   Microsoft Azure

Financial System   ORACLE E-BUSINESS SUITE

Ontario

Our users

External Stakeholders		Internal Ministry Staff

Erica
**Director of Operations
Small Not-for-Profit**

- Performs *multiple tasks* including managing finances, program services, etc.

- Works with *many ministries* to get funding for their services

Drew
**Program Officer
Large Municipality**

- Performs specialized, *high volume* activities related to funding from *one ministry*

- Works with a *single ministry* to get funding for their services

Brad
**Funding Administrator
Medium-sized Ministry**

- Administers *multiple* transfer payment funding to *many stakeholders*
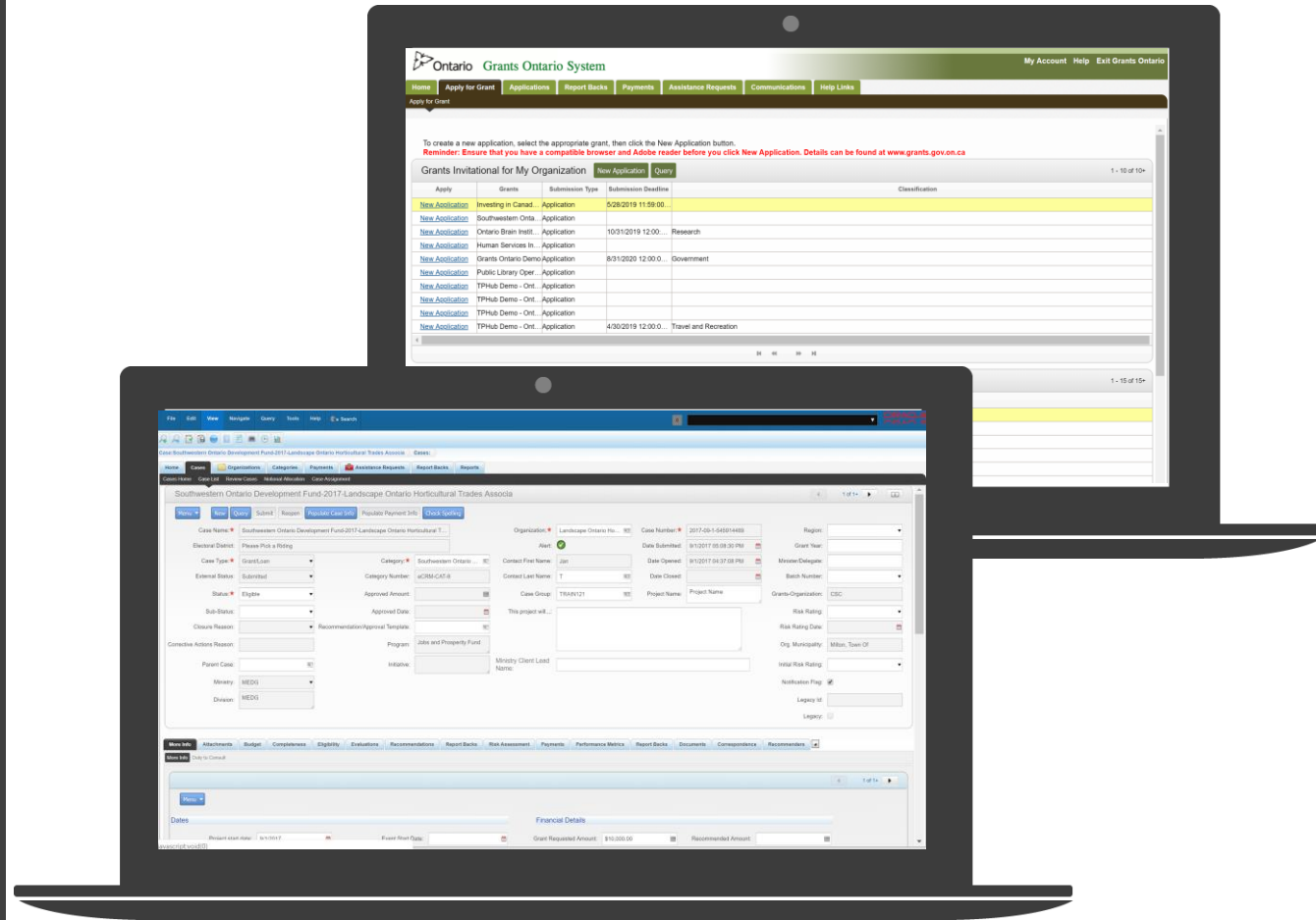
- Ensures provincial funding is used *effectively*

Ontario

Project

- Our current user experience
- Our challenges
- Our goals
- Our approach
- Our team
- Our results

Our current **user** **experience**

Standard Siebel look-and-feel

- Multiple layers of tabs

- Multi-column forms

- Few visual aids

- Difficult to navigate

- Traditional styling

- Non-responsive design

Ontario

Our challenges

External Stakeholders		Internal Ministry Staff

Erica
Director of Operations
Small Not-for-Profit

"I'm a new user who doesn't use the system every day but its not intuitive"

"The user journey is disjointed, complicated and confusing"

Drew
Program Officer
Large Municipality

"It takes too many clicks to complete simple, repeatable tasks"

"The user interface looks old and outdated"

Brad
**Grant Officer**
Medium-sized Ministry

"The screens are so busy and cluttered it hurts my head to look at it for too long"

Ontario

Our goals

- **Technology**
  - Implemented robust new technology infrastructure
  - Implemented the latest version of Siebel CRM product
    - Upgraded from Siebel **8.1.1.11** to Siebel **2018.12**
      - Currently on using Siebel **2020.4**

- **Renaming**
  - Officially transition from Grants Ontario to Transfer Payments Ontario

- **Improve User Experience**
  - Seamless integration of all system components
  - Task-based navigation
  - Consistent styling with Ontario.ca
  - Simplified, responsive design
  - Apply User Experience Best Practices

- **Meet Accessibility Requirements**
  - Compliance with accessibility standards of all system components

Ontario
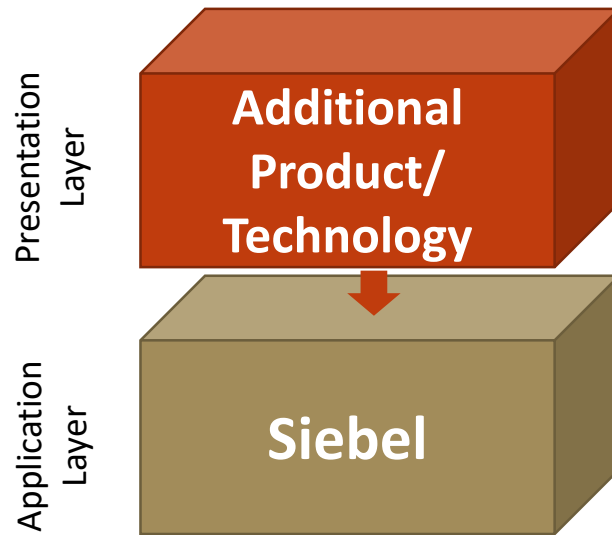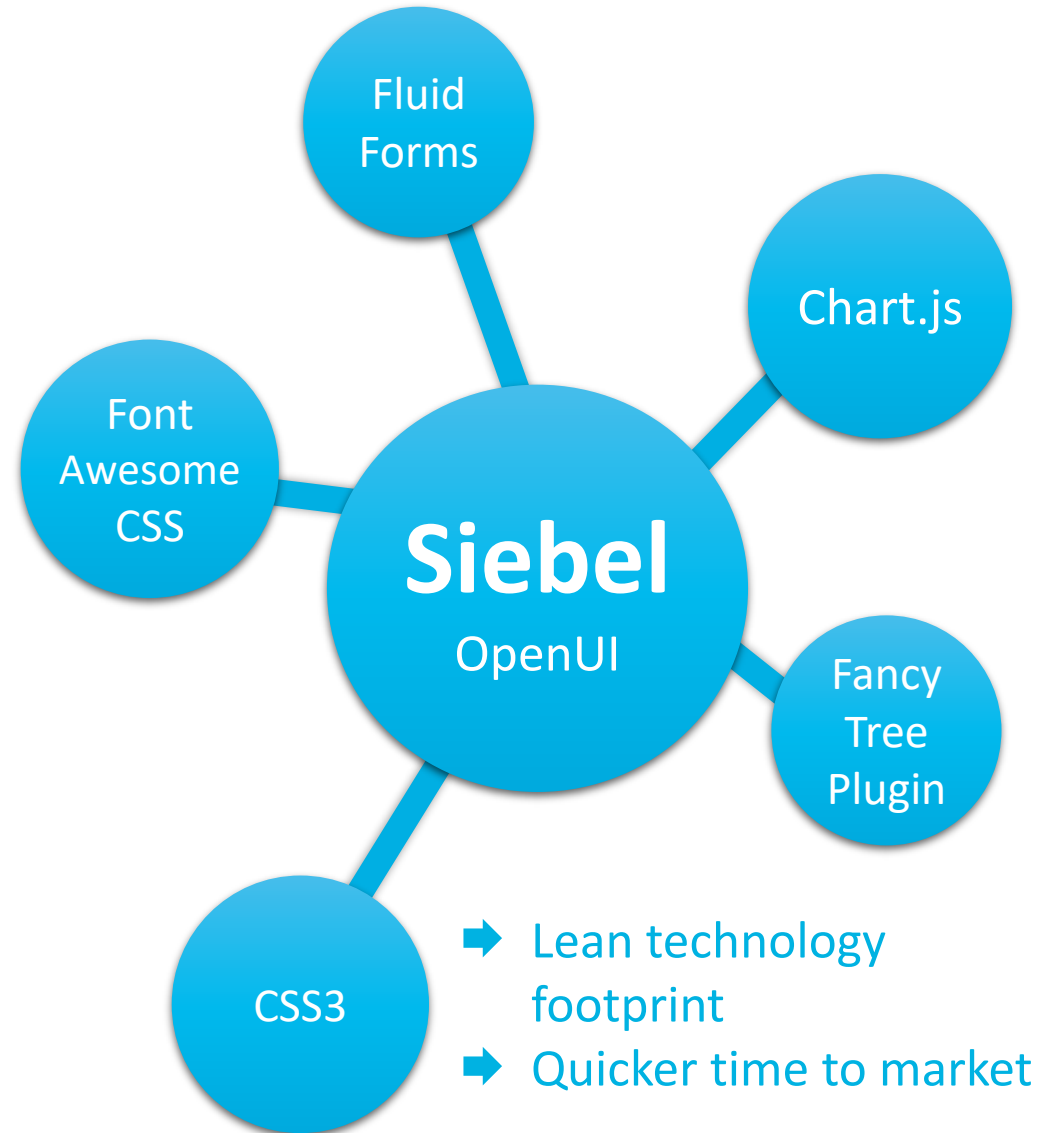
Our team

Supreet
Siebel Solution Architect

- Designed solution approach
- Configured Siebel objects, web templates, etc.
- Integrated Open Source plugins/libraries

Brendan
UX Designer

- Designed the user interface
- Developed style sheets and general behavior elements using CSS, JavaScript, JQuery, etc.

Eulysses
Siebel Solution Architect

- Established development standards
  Developed navigation framework
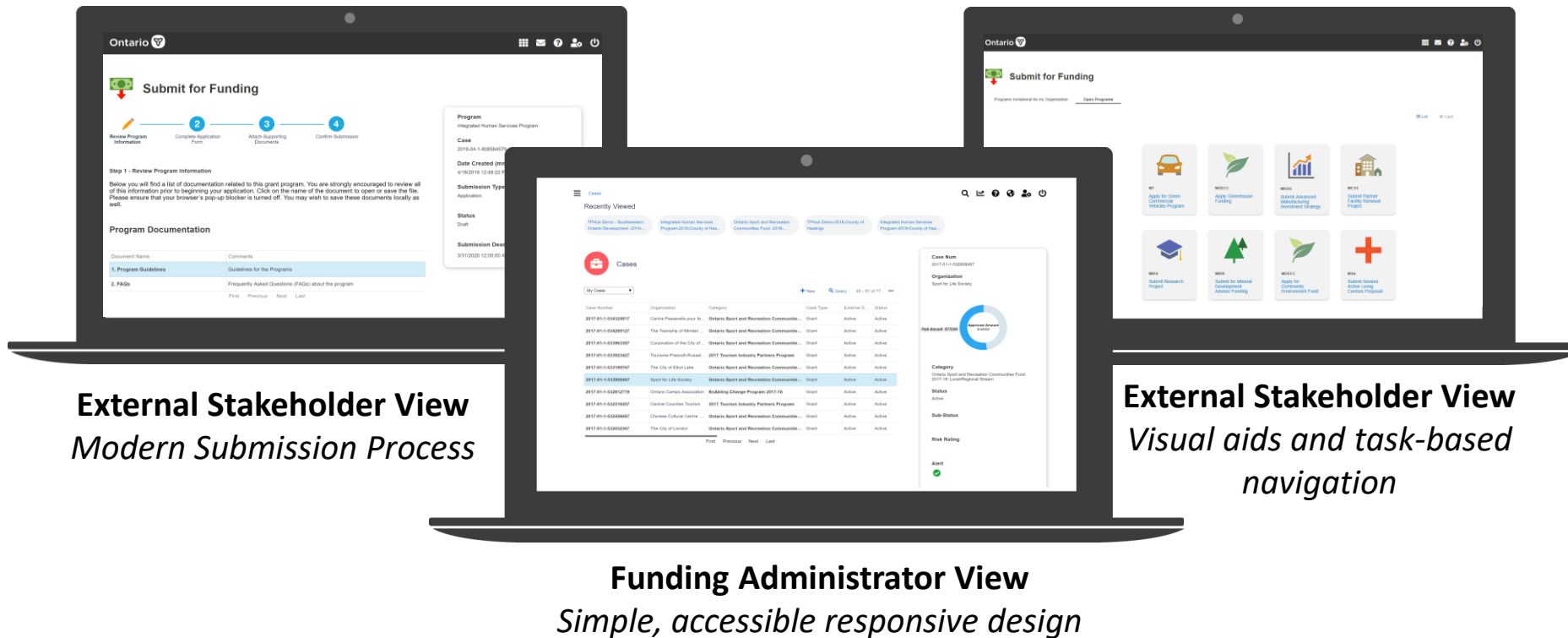- Configured Siebel objects, web templates, etc.

Nadine
UX Designer

- Conduct User Research
- Designed the user interface
- Develop mo.

Ontario

Our results

a citizen-centered and digital first design that *optimizes* the Siebel OpenUI framework to achieve *intuitive* user experience.

External Stakeholder View
Modern Submission Process

Funding Administrator View
Simple, accessible responsive design

External Stakeholder View
Visual aids and task-based navigation

Ontario

Demo

🔭 I am looking to:

Submit for Funding

Submit Report to Ministry

See My Payments

See My Funding History

See My Repayments

Manage My Contracts

Hello,
Kawhi Leonard
Welcome to Transfer Payment Ontario!

Organization
County of Hastings

Recently Viewed

📋 MFA Francophone Busi...

CASE NUMBER
2020-09-1-1424547989

📋 MFA Francophone Busi...

CASE NUMBER
2020-09-1-1424495619

📋 Personal Support Work...

CASE NUMBER
2020-09-1-1424374089

📋 Personal Support Work...

CASE NUMBER

Thank you!

For further questions, contact

Roy Thomas   roy.thomas@ontario.ca

Ontario

Customer Success

Land and Resources IT Cluster, Ministry of Natural Resources and Forestry

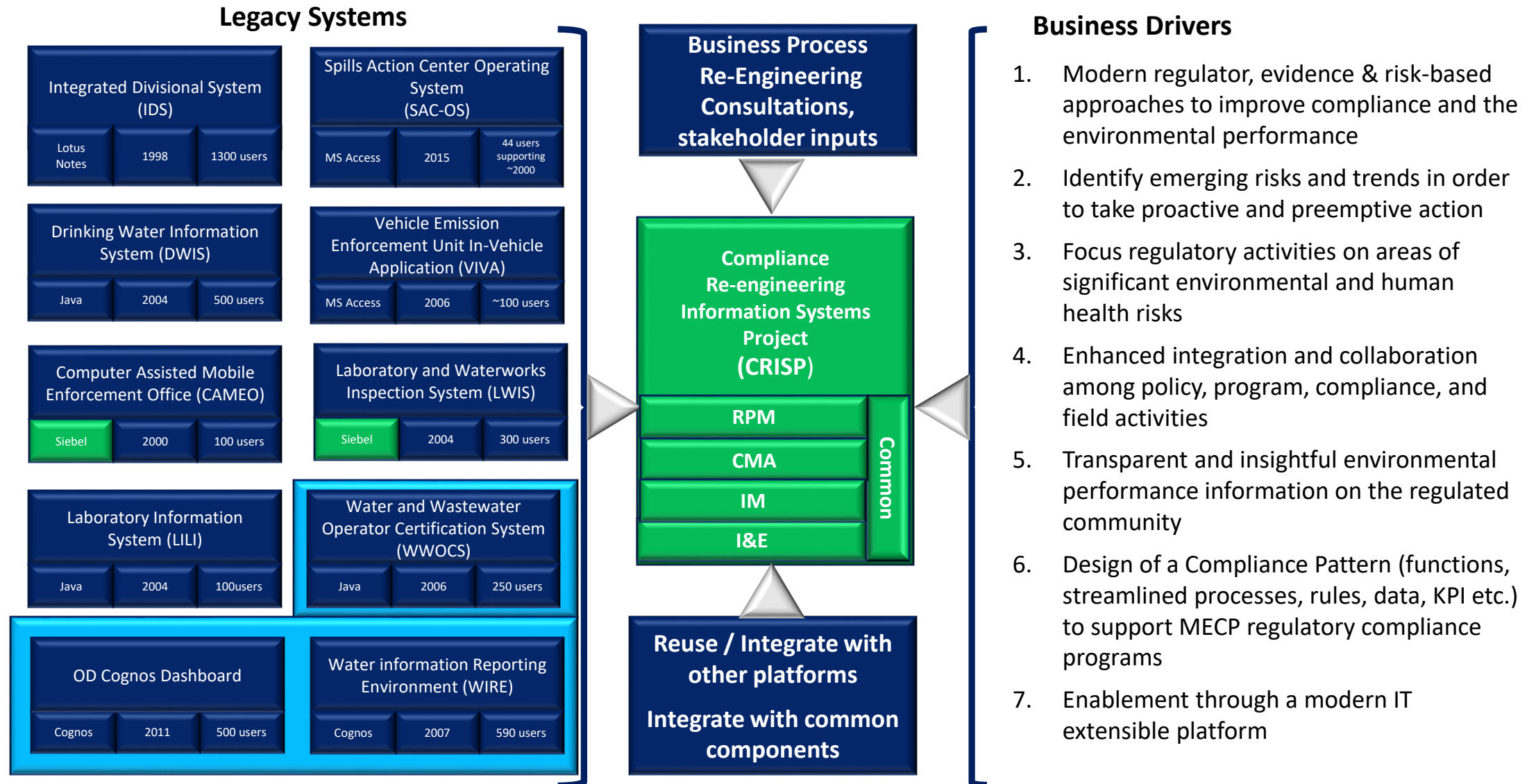Siebel CRM Strategy & Customer Success for Public Sector

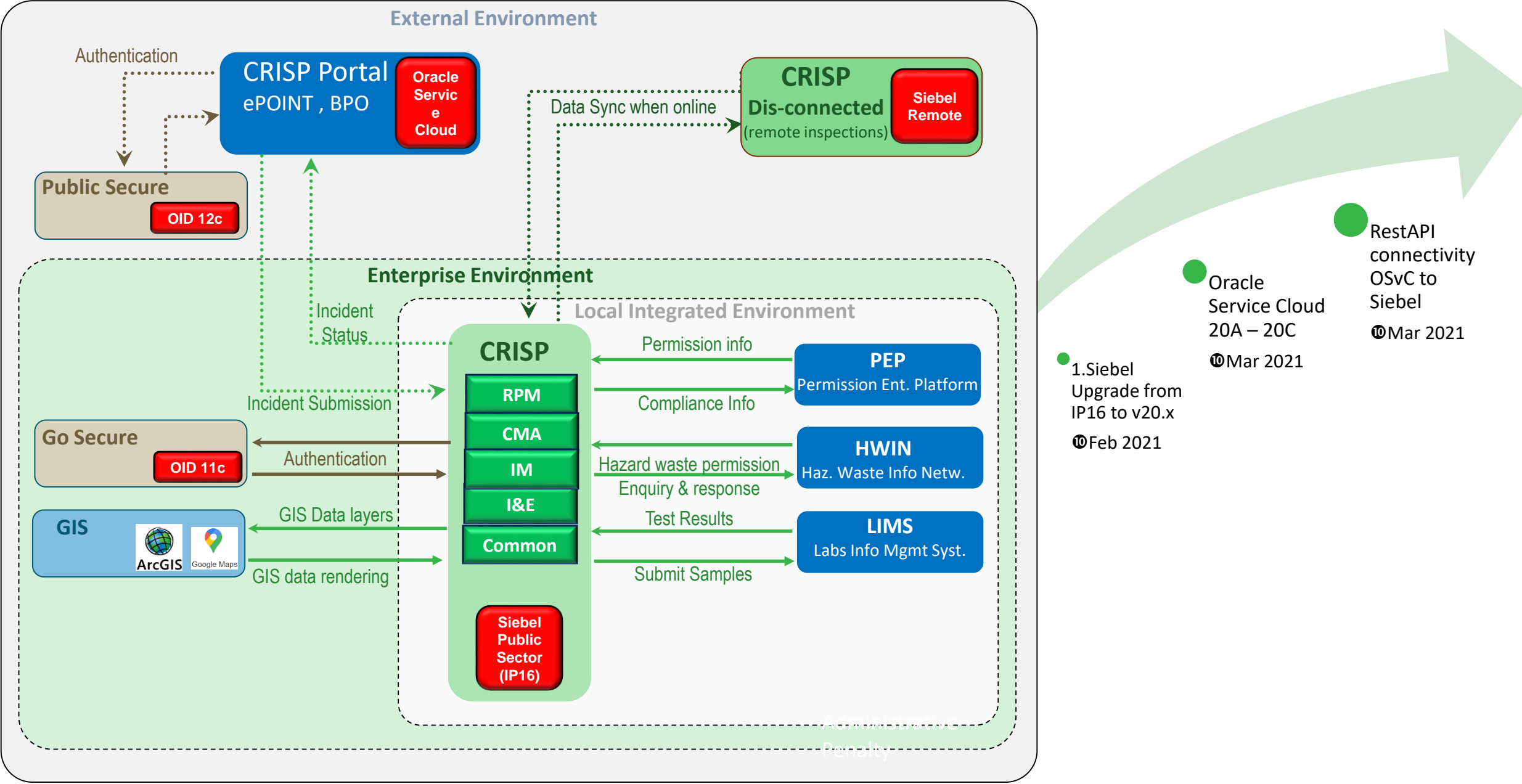Compliance Re-engineering Information Systems Project (CRISP)

Ontario Ministry of Environment, Conservation & Parks

Drinking Water and Environmental Compliance Division

and

Land & Resources I&IT Cluster

Business / Technology at a Glance

Legacy Systems

Integrated Divisional System (IDS)		
Lotus Notes	1998	1300 users

Spills Action Center Operating System (SAC-OS)		
MS Access	2015	44 users supporting ~2000

Drinking Water Information System (DWIS)		
Java	2004	500 users

Vehicle Emission Enforcement Unit In-Vehicle Application (VIVA)		
MS Access	2006	~100 users

Computer Assisted Mobile Enforcement Office (CAMEO)		
Siebel	2000	100 users

Laboratory and Waterworks Inspection System (LWIS)		
Siebel	2004	300 users

Laboratory Information System (LILI)		
Java	2004	100users

Water and Wastewater Operator Certification System (WWOCS)		
Java	2006	250 users

OD Cognos Dashboard		
Cognos	2011	500 users

Water information Reporting Environment (WIRE)		
Cognos	2007	590 users

Business Process Re-Engineering Consultations, stakeholder inputs

Compliance Re-engineering Information Systems Project (CRISP)

- RPM
- CMA
- IM
- I&E

Common

Reuse / Integrate with other platforms

Integrate with common components

Business Drivers

1. Modern regulator, evidence & risk-based approaches to improve compliance and the environmental performance
2. Identify emerging risks and trends in order to take proactive and preemptive action
3. Focus regulatory activities on areas of significant environmental and human health risks
4. Enhanced integration and collaboration among policy, program, compliance, and field activities
5. Transparent and insightful environmental performance information on the regulated community
6. Design of a Compliance Pattern (functions, streamlined processes, rules, data, KPI etc.) to support MECP regulatory compliance programs
7. Enablement through a modern IT extensible platform

Technology Overview

New Digital Channels – Using Oracle Service Cloud

## G2C Channel

Online Pollution Reporting

Ontario citizen contact the Environment Ministry's Spills Action Centre to report incidents of pollution such as odour, noise, smoke, dust or illegal waste dumping

Before:

- Citizens call the Spills Action Centre and report the incident
- Agent creates incident report
- Challenges:
  - Difficulty to pinpoint exact locations
  - Time lag in later sending and matching supporting pictures or videos

After:

- Citizens able to report pollution events using a Smartphone utilizing it's GEO locating and camera to simply the reporting process.
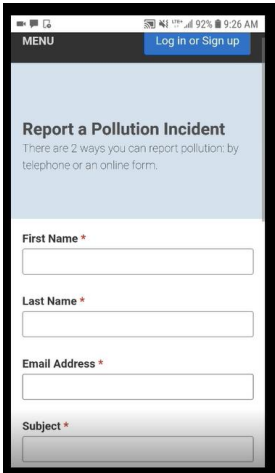
Video Demo

G2G Channel (Broader Public Sector)

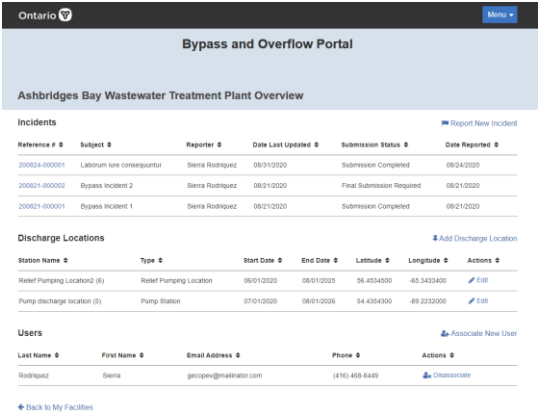### Waste Water By-Pass / Overflow Reporting

Ontario's 440 Municipalities required to report any waste water bypass and overflow incidents within 24 hours, followed by regular report backs.

Before:

- Each municipality would fill out a pdf form and sent it in to the ministry to be transcribed into the legacy incident management system
- Challenges:
  - Data integrity issues
  - Significant time lag before public is aware of incident

After:

- Municipalities able to submit incidents Online, data is reviewed and available to the public on a GIS map

Video Demo.

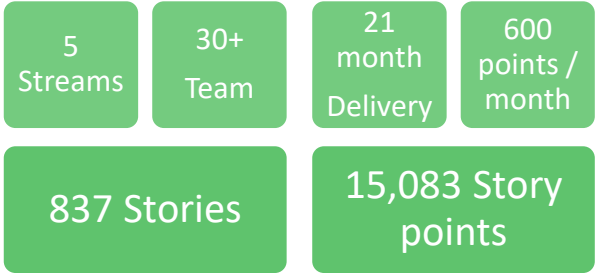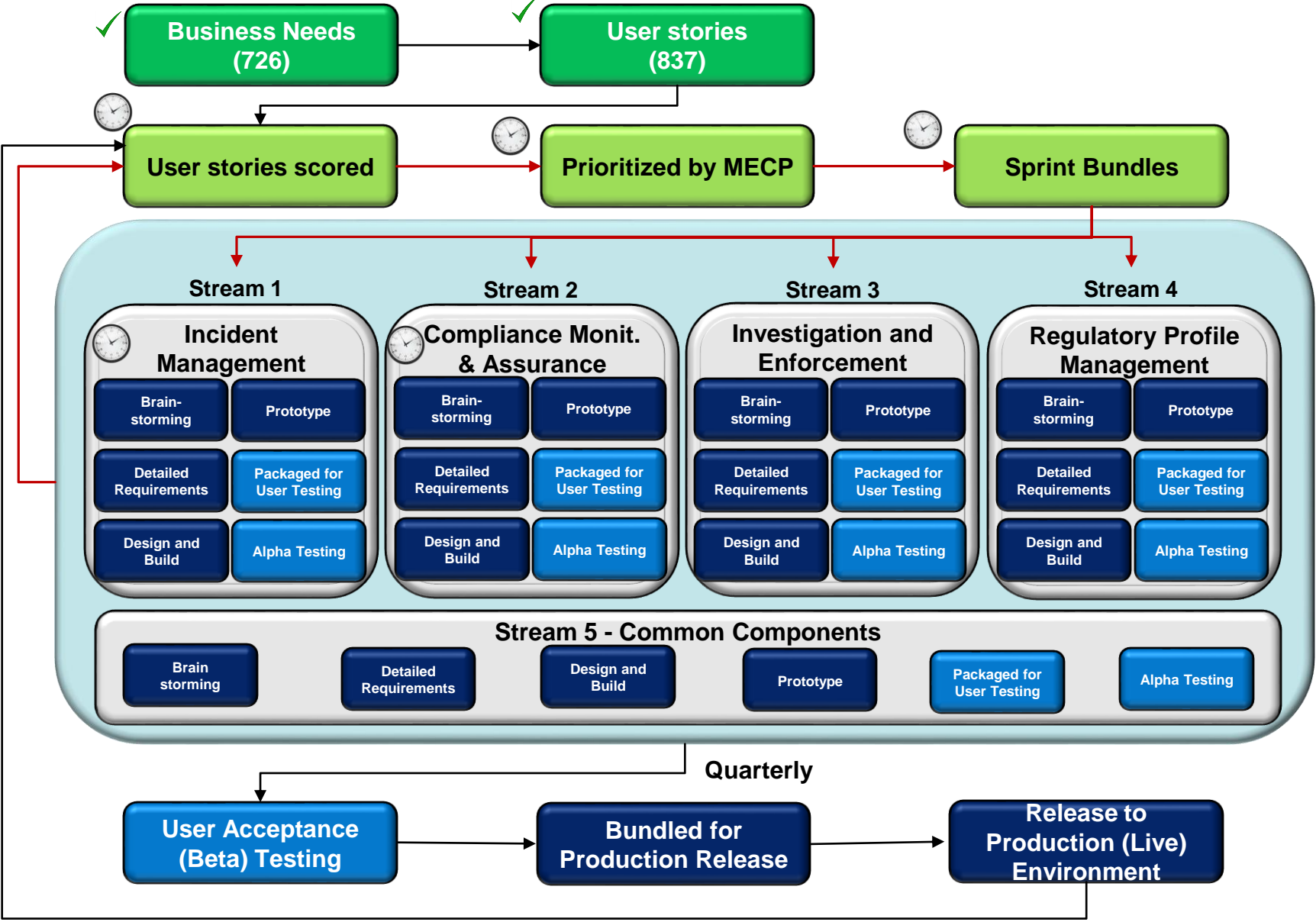# New Digital Channels: G2C –Online Pollution Reporting

New Digital Channels: G2G – Waste Water ByPass / Overflow Reporting

CRISP Design and Delivery Schematics using Agile

Scope

✓ **Business Needs (726)** → ✓ **User stories (837)**

User stories scored → **Prioritized by MECP** → **Sprint Bundles**

Iterative Design and Delivery using Sprints

Stream 1 — Incident Management
- Brain-storming
- Prototype
- Detailed Requirements
- Packaged for User Testing
- Design and Build
- Alpha Testing

Stream 2 — Compliance Monit. & Assurance
- Brain-storming
- Prototype
- Detailed Requirements
- Packaged for User Testing
- Design and Build
- Alpha Testing

Stream 3 — Investigation and Enforcement
- Brain-storming
- Prototype
- Detailed Requirements
- Packaged for User Testing
- Design and Build
- Alpha Testing

Stream 4 — Regulatory Profile Management
- Brain-storming
- Prototype
- Detailed Requirements
- Packaged for User Testing
- Design and Build
- Alpha Testing

Stream 5 - Common Components
- Brain storming
- Detailed Requirements
- Design and Build
- Prototype
- Packaged for User Testing
- Alpha Testing

Quarterly

User Acceptance (Beta) Testing → **Bundled for Production Release** → **Release to Production (Live) Environment**

- 5 Streams
- 30+ Team
- 21 month Delivery
- 600 points / month
- 837 Stories
- 15,083 Story points

Success Factors:

✓ Established in-house expertise
✓ Co-located business / tech. Teams (prior to COVID-19)
✓ 3 week sprints
✓ 2 scrums / week using Jira as digital Kanban
✓ User-centric design, engaged end-users
✓ 100+ SMEs provincewide
✓ Alpha / Beta testing
✓ Field tests prior to launch
✓ Post implementation support

30

Key Technology Aspects

- Integration with GIS (Maps) `Map`
  - Used PR/PM custom bi-directional calls to embedded GIS maps in Siebel views
  - Enables business to drill down into detailed information in Siebel by highlighting points on the map.

- SMART Inspections `Scripts`
  - Used SMARTScript, sales assessment and workflows to enable business to design and promote deterministic questionnaires for inspections
  - enables business to rapidly and independently generate and deploy inspection templates for emerging issues

- Designed as Re-usable / Rapid on-boarding Enterprise Compliance Solution for Ontario Government
  - Activated Siebel's multi-organization feature to enable data segregation for different ministries
  - Developed data upload tools using Excel macros and web services to enable business to bulk upload data

- Siebel – Oracle Service Cloud Integration
  - Leveraged Oracle RightNow Customer Portal Framework and front-end technologies to create web portals for G2C and G2G digital products
    - Invoke OSvC SOAP web services from Siebel periodically to implement a bi-directional integration of OSvC and Siebel.
    - Will replace SOAP with REST, and integrate and exchange data in real-time as part of the next project release.

What's Next

Approaching the Challenges: Siebel CRM Modernization Patterns

Rapid Value from CRM & Cloud

Siebel CRM enriched with OCI Gen2 hosting and management

- **Reduce TCO** by moving your Siebel CRM deployment on Cloud infrastructure for elastic agility. Deploy with Containers & Kubernetes
- **Transform** let Oracle help you to complete the IT transition from on premise to cloud solutions
- **DevOps** near zero downtime and CI/CD pipelines at extreme scale with the latest Siebel CRM release

Transformation to Cloud

Migrate Siebel CRM to complete cloud solutions from Oracle

- **SaaS++** Oracle's CX solutions can be quickly deployed and integrated with Siebel CRM for extended functionality
- **Transform** your view of CRM and deliver orchestrated, omni-channel Customer Experiences powered by data and real-time signals
- **Oracle Leadership** can lead you in a phased transition to ensure clear ROI and competitive advantages

Modernize Siebel CRM with Cloud Applications

Surround Siebel CRM with cloud innovation

- **Innovate** - Oracle's PaaS services can be integrated into Siebel CRM – e.g. Chatbots, Mobile Cloud, IoT, Content Management, Live Experience, Analytics Cloud
- **Integration** of Oracle's CX Suite into existing Siebel CRM implementations with Oracle's secure cloud integration platform
- **Enhance UX** – improve CX, AI powered UX design, create Mobile Apps rapidly

Related Session: Digital Transformation Strategies for your Siebel CRM Application

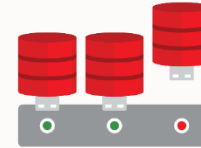# Siebel CRM in Recent Years: Supporting your CX Transformation journey

PARALLEL DEVELOPMENT
New seed data framework and Workflow deployment

SEAMLESS UPDATES
Monthly Release Updates & Seamless Repository Framework eliminates need for IRM

SIEBEL AS A SERVICE
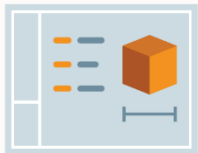Componentization of Siebel CRM as a Suite of Microservices

CLOUD INFRASTRUCTURE
Reduced TCO - Move & Improve Siebel CRM by deploying to Oracle Cloud Infrastructure

IT

Business

WEB TOOLS
Web Tools evolution with Script Debugger, Task & Workflow Editors and Simulators

AUTOMATION
Rest API Enabled CI/CD Components & Test Automation

UX & MOBILITY
Flexible UX and Mobile app to support business-tailored, intuitive UI development

EXTREME SCALE
Enterprise grade CRM with supreme performance and scalability for highly mission-critical implementations

Why adopt the latest Siebel CRM release? : Value Contributors

Business Justification:

- Reduced Total Cost of Ownership (TCO) from Value Contributors.
- With monthly update model, get Features and Fixes every month.
- Expose existing processes and data via REST to make Siebel as the core for Digital Transformation.
- Extend existing services to new channels using Siebel Mobile, Email (outlook integration) and complimentary Oracle solutions (Analytics, Chatbot).

1 Extract Hardware ROI

With Siebel on OCI and Container-based deployment, extract most returns on your Hardware investments.

'40% reduction in Operations costs; 75% reduction in Hardware resources' *

2 Zero Downtime

Eliminate downtime with new agility related features.

'Reduced downtime from ~4h to ~1h; New goal of < 15min' *

3 Developer Productivity

Improved developer productivity through Parallel Development and WebTools - Faster development, Faster deployment.

4 Test Automation

With the new Test Automation feature, divert the effort and dollars saved in testing towards innovation.

5 Reduced time for updates

With Seamless repository framework apply updates in hours (instead of weeks), without IRM.

'96% reduction in time taken to apply an update' *

As per data shared by specific customers

Sample Customers Live with the Continuous Release Model

Key Takeaways

Customer Success.

Siebel Public Sector continues to flourish with its proven functionality, scalability and performance

ROI & Agility.

Update your Siebel CRM platform to the latest release for increased agility - configurable, lightweight and nimble across both on-premise and cloud

Leadership.

Proven track record in Public Sector. Connect directly with our Industry Strategy team in the Customer Advisory Board

Thank You

—

Take the Siebel CRM Innovation Survey

Let us help you kickstart your Siebel CRM transformation

https://go.oracle.com/siebelcrm-innovation

Stay Connected

blogs.oracle.com/siebelcrm

Useful Resources

Siebel CRM Blog
Siebel CRM YouTube
Siebel CRM Sales Team ✉
Siebel CRM ACS Services ✉
Oracle Support Value
Partner Spotlights

Siebel CRM Learning Subscription
(Free content, click Preview)
Siebel CRM Bookshelf
Siebel CRM Github
Siebel CRM Advisor Webcasts
My Oracle Support Community

Siebel CRM Statement of Direction
Siebel CRM Release Updates
Siebel CRM Premier Support
Datasheets – Features by Release
Siebel CRM Ideas (Collaboration)

Siebel CRM Customer Connect
CAB portal
LinkedIn Customer Connect
Newsletter Email Distribution list
(Customer) & (Partner)
Virtual CAB replays