ORACLE

Managing Relationships through Shifting Channels in Automotive

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Siebel CRM

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Safe harbor statement

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Presenters

Nitin Misra

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ORACLE
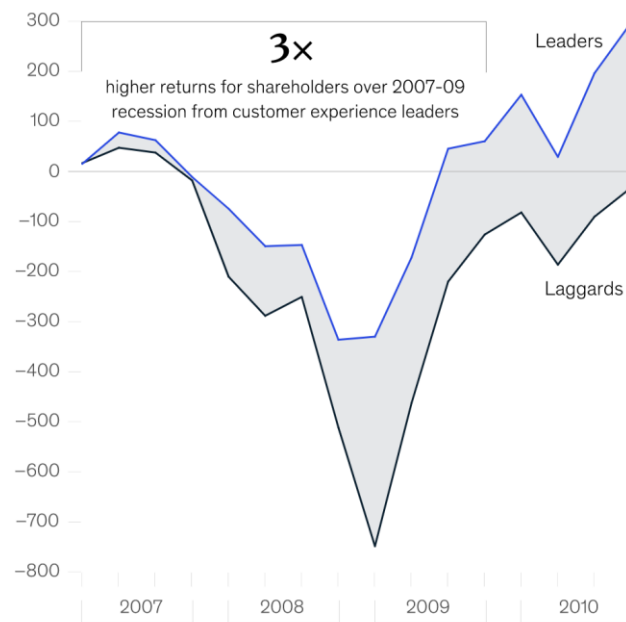Siebel

Christina Paulsen

Manager-CRM, Riverland
Reply GmbH

REPLY

Customer Experience: Key Driver post COVID world

Focusing on CX is a winning strategy in recession

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

(Chart axis values: 300, 200, 100, 0, −100, −200, −300, −400, −500, −600, −700, −800; years 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

Addressing immediate customer needs and preparing for the future

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 Automotive 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

Vehicle Information	Loan & Lease Accounts	Remarketing
Warranty Management	Claims	Vehicle Telematics – IoT integration
Vehicle Sales History	Collections	Vehicle 360
Recalls	End of Lease	Decision Science (BI)

INTRODUCTION

Christina Paulsen, Manager.

- 12 years in Oracle Siebel projects
- International, market leading customers in different industries like Automotive, Aviation, Manufacturing, Travel Management and Telecommunication
- From classical consultant over devops lead to project manager (current project: 1.5 years development, 3.5 years project management)

Riverland Reply GmbH.

- Oracle specialized partner within the Reply Living Network: Oracle Platinum Partner, Oracle Cloud Transformation Partner of the year 2019
- Committed to deliver premium business solutions by using Native Cloud & Oracle technologies
- Strong experience on Enterprise customers and their complexity

Feel free to connect on LinkedIn and visit RiverlandReply.

Reply Living Network
- Founded in 1996
- \> 1000 Oracle professionals in Europe
- Strategic partner of Oracle, MS, SAP, …
- \> 1 billion €uro revenue

Riverland Reply Hard Facts
- Founded in 2008
- ~ 100 consultants
- Extended network > 300 resources
- \> € 20 million €uro revenue

PROJECT BACKGROUND

Organizational.

- Leading automotive customer in Central Europe

- Fleet Management system with different markets having individual business and technical requirements

- Project started in 2008, with one pilot market

- Waterfall model, with 2-3 releases per year

- CRM core connected to ~50 interfaces

- Development by Riverland Reply, Operations by Red Reply (since 2017)

Technical.

- CRM core: Oracle Siebel 19.11

- Middleware: IBM Business Automation Workflow 19.0.0.2

- BI: Oracle Analytics Cloud

- Infrastructure: Oracle Cloud Machine (managed by Red Reply)

- Test Automation: HP ALM UFT OpenUI Plugin (plan to migrate to Siebel Test Automation)

PROJECT BACKGROUND

USE CASES – A SUMMARY

USE CASE	DESCRIPTION
Create Company	- A user enters (basic) company data into the application - Company / address validation via interface - Companies can be automatically created via interfaces
Activate Company	- When all needed company data is entered, companies can be activated - Only for activated companies, contracts can be created etc.
Create Contract	- A user creates a (frame) contract for an activated company - A user adds contract terms to the contract - Contract terms can either be based on manual or automatic assignment
Validate Contract	- When all needed contract data is entered, the contract needs to be validated - Rules for contract validation are defined on individual market needs - After the contract validation, the user will either get a positive feedback or has the option to review the errors / warnings, in case of unsuccessful validation
Approve Contract	- Defined users need to approve the contract - Based on contract data and market needs, the associated approval process is triggered

PROBLEM STATEMENT

- **FUNCTIONAL COMPLEXITY** – Over the years, many complex functionalities were added

- **MISSING HARMONIZATION** – Very differing market requirements, not enough harmonized

- **USABILITY** – Too long way between user and development team for process improvements

- **GUI OVERLOAD** – Applets and views got overloaded

- **OLD SCHOOL GUI** – OpenUI options were rarely applied

- **MISSING USER-SYSTEM IDENTIFICATION** – Company / brand CI not integrated in the GUI

- **SATIETY** – Only few new change requests as markets in general saturated

SOLUTION APPROACH
BEST PRACTICES: DESIGN THINKING WORKSHOPS (DTWS)

PHASE	TASKS
Prepare Workshops	■ Identify the stakeholders ■ Perform interviews and, if possible, DILOs ■ Monitor usage patterns, analyze and conclude results
Perform Workshops	■ Invite representatives for all stakeholders, all equal in DTWS ■ Present / print out all current available views ■ Identify what *is not* needed and prioritize what *is* ■ Mixed group work: re-design and discuss ■ Redefine designs, prioritize and track expectations
Implement Results	■ Design the workshop results in more detailed sketches ■ Let the development team do the "magic" ■ Present regularly results, get and incorporate feedback
Present Results	■ Present workshop outcome vs. implementation result & benefits ■ Outline updated design decisions & challenges overcome ■ Get feedback & compare satisfaction factor before and after DTWS
Plan Next Steps	■ Improvements are a living process ■ Based on timeline and budget, in general multiple phases ■ Define, prioritize and schedule next steps
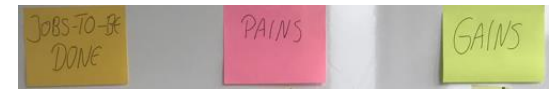
SOLUTION APPROACH
TIMELINE: FROM KICKOFF TO THE FIRST MVP'S GOLIVE

TIMEFRAME	TASKS	GOALS
July	▪ Kickoff ▪ Visioning	▪ Identify timeline and stakeholders ▪ Define goals and context
August	▪ Research ▪ Design Thinking Workshop 1	▪ Perform analysis and execute user interviews ▪ Ideation, prototyping, prioritization and finalization
Sept. / Oct.	▪ Development ▪ Design Thinking Workshop 2	▪ Develop PoC, present and review results ▪ Enhance the scope
Nov. / Dec.	▪ Development 2	▪ Develop further UX improvements (with decision to postpone the GoLive)
Jan. / Feb.	▪ Test / UAT	▪ Test the results ▪ Fix defects and add new items to backlog
March	▪ GoLive	▪ ☺

Companies

- **Main Menu** on the left side of the screen, only with key functions: Search, Companies, Create Company, (Todo), Admin, Logout

- **Corporate Identity** applied across the application

- **Create Company**

  - One click via menu

  - User is guided through the process and gets feedback regarding required fields before continuing with next step

  - Only applets displayed that the user is working on, with reduced amount of fields and menu items

Companies

- Current record is highlighted, detail applets on the right side

- Minimal information in list, summary as header

- Improved structure of fields, with as harmonized as possible for all markets

- Added progress bar to easily see the status

Contacts

- Tiles: User-friendly, intuitive layout – analog to other applications

- List: User can see and edit needed information

- User can change style due to preference and need

Contracts

- Most important information, with reduced number of fields, as entry screen: 0 clicks

- Only one step to contract creation, details and approval

- Create contract: guided step-by-step process, analog to company creation

- Contract approval: state model enhanced to virtual Business Component, so that for each approval flow, there is one line incl. approval status, approver, date and note, in case of refusal

RESULTS AND BENEFITS

2x Improvement in Satisfaction Score

Reduced process completion time; Most of the process steps made reachable in < 5 clicks.

Major Goals & Benefits.

➢ Clearly structured main navigation

➢ More screen „real estate" for (list) content

➢ No clutter, no more information overflow

➢ Optimized number of input fields, more straightforward entering of data

➢ Guided step-by-step processes

➢ Adaption of Corporate Identity

LESSONS LEARNT

Challenges.

- Coaching customer on multi-phased approach: UX improvements in general evolve over multiple phases
- Combination of required Siebel and Web Development skills

Positive Feedback.

- Very efficient, fun way to identify bottlenecks and re-design the system based on needs
- Users felt like operating a new-age system, but with the same core

Lessons Learnt.

- Very important to have regular sessions with all stakeholders involved
- Small changes can have big effects
- Key factors for successful UX
  - Less is more
  - Process transparency
  - User guided step-by-step process
  - User identification with the system
- UX improvements are a continuous process and never „finished"

FUTURE ROADMAP

First DTWS was in 2018, since then…

- Identification and implementation of further improvements
- Continuously added new functionalities
- Siebel, middleware & DB upgrade (2019/20)

Current Scope.

- New complex interfaces, incl. extended company lookup
- Add identified new user features

Next to come.

- Interface extensions
- Idea: move test automation to Siebel
- Idea: add further devices
- Organize further DTWS ☺

Analyze

Design

Develop

Review
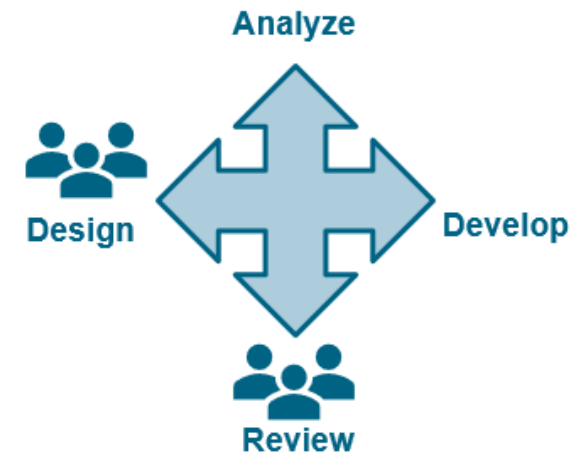
Siebel CRM Transformation for our Automotive customers

Poll:
What is the current Siebel version your organization is using?

IP 2014 or older

IP 2015 or IP 2016

Siebel 19.x or newer

Poll:
What would you like to see in Siebel roadmap??

More industry specific features

Improved support for Headless Operation

Enhanced Data Analytics

Data led Process Automation

C360 and Dashboards

Enhanced User Interface possibilities

Machine Learning and AI use cases

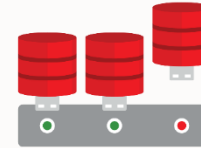# Siebel CRM in Recent Years: Supporting your CX Transformation journey

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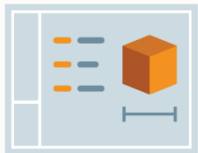
WEB TOOLS
Web Tools evolution with Script Debugger, Task & Workflow Editors and Simulators

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

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

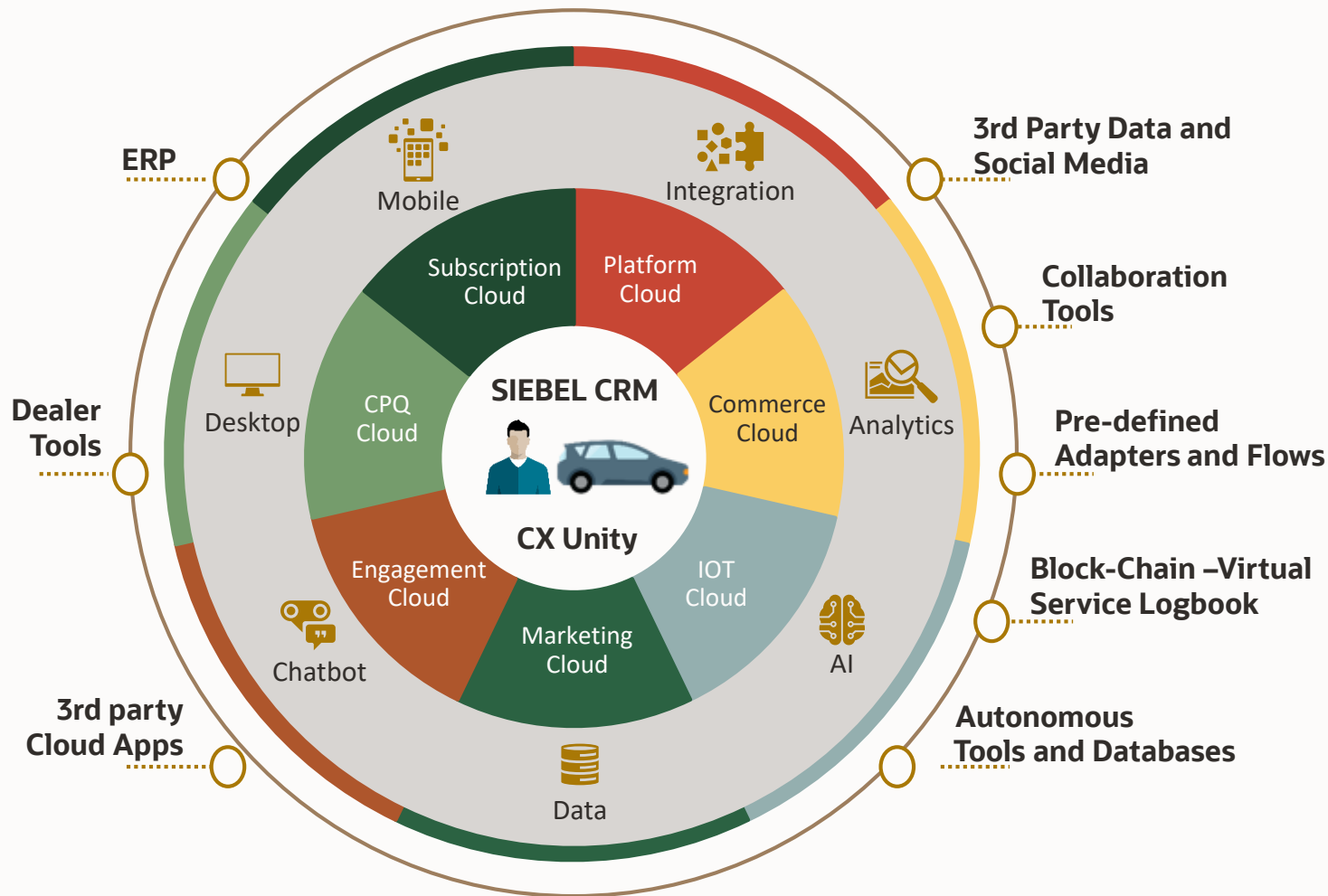Migrate Siebel CRM to complete cloud solutions from Oracle

- **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

Digital Excellence - The only End to End Automotive Platform

ERP

Dealer Tools

3rd party Cloud Apps

Mobile

Desktop

Chatbot

Subscription Cloud

CPQ Cloud

Engagement Cloud

Marketing Cloud

SIEBEL CRM

CX Unity

Platform Cloud

Commerce Cloud

IOT Cloud

Data

Integration

Analytics

AI

3rd Party Data and Social Media

Collaboration Tools

Pre-defined Adapters and Flows

Block-Chain –Virtual Service Logbook

Autonomous Tools and Databases

1 | Data First Approach

2 | Modern User Experience

3 | Industry Specific Digital Experience Platform

4 | End to End Applications

5 | Modern Cloud infrastructure

Key Takeaways

Customer Success.

Siebel Automotive 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 Automotive. Connect directly with our Industry Strategy team in the Customer Advisory Board
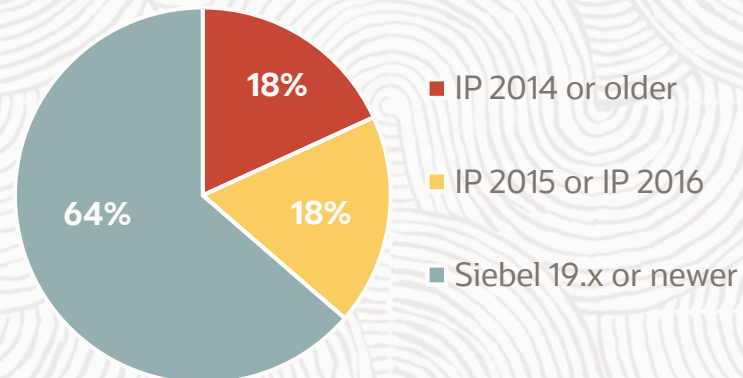
Thank You

Poll Result:
What is the current Siebel version your organization is using?

IP 2014 or older
IP 2015 or IP 2016
Siebel 19.x or newer

18%

64%

18%

- IP 2014 or older
- IP 2015 or IP 2016
- Siebel 19.x or newer

Poll Result:
What would you like to see in Siebel roadmap??

More industry specific features

Improved support for Headless Operation

Enhanced Data Analytics

Data led Process Automation

C360 and Dashboards

Enhanced User Interface possibilities

Machine Learning and AI use cases

Category	Percentage
Machine Learning and AI use cases	82%
Enhanced User Interface possibilities	77%
C360 and Dashboards	68%
Data led Process Automation	59%
Enhanced Data Analytics	45%
Improved support for Headless Operation	36%
More industry specific features	36%

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Let us help you kickstart your Siebel CRM transformation

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

Useful Resources

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

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Siebel CRM Bookshelf
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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