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Siebel CRM

Strategy & Roadmap for Digital Transformation

—

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GVP, CRM Apps

September, 2020

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Oracle

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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.

Why are we here?
The annual Siebel CRM fake-news-and-myth busting festival

Siebel is alive

25 sessions – strategy, implementations, architecture – over the next 3 weeks

Siebel is worth the investment

Annual ROI testimonials of satisfied customers, being augmented again

Siebel is flexible

Adding *SaaS* to On-Premise, IaaS and PaaS this year

Siebel is everywhere

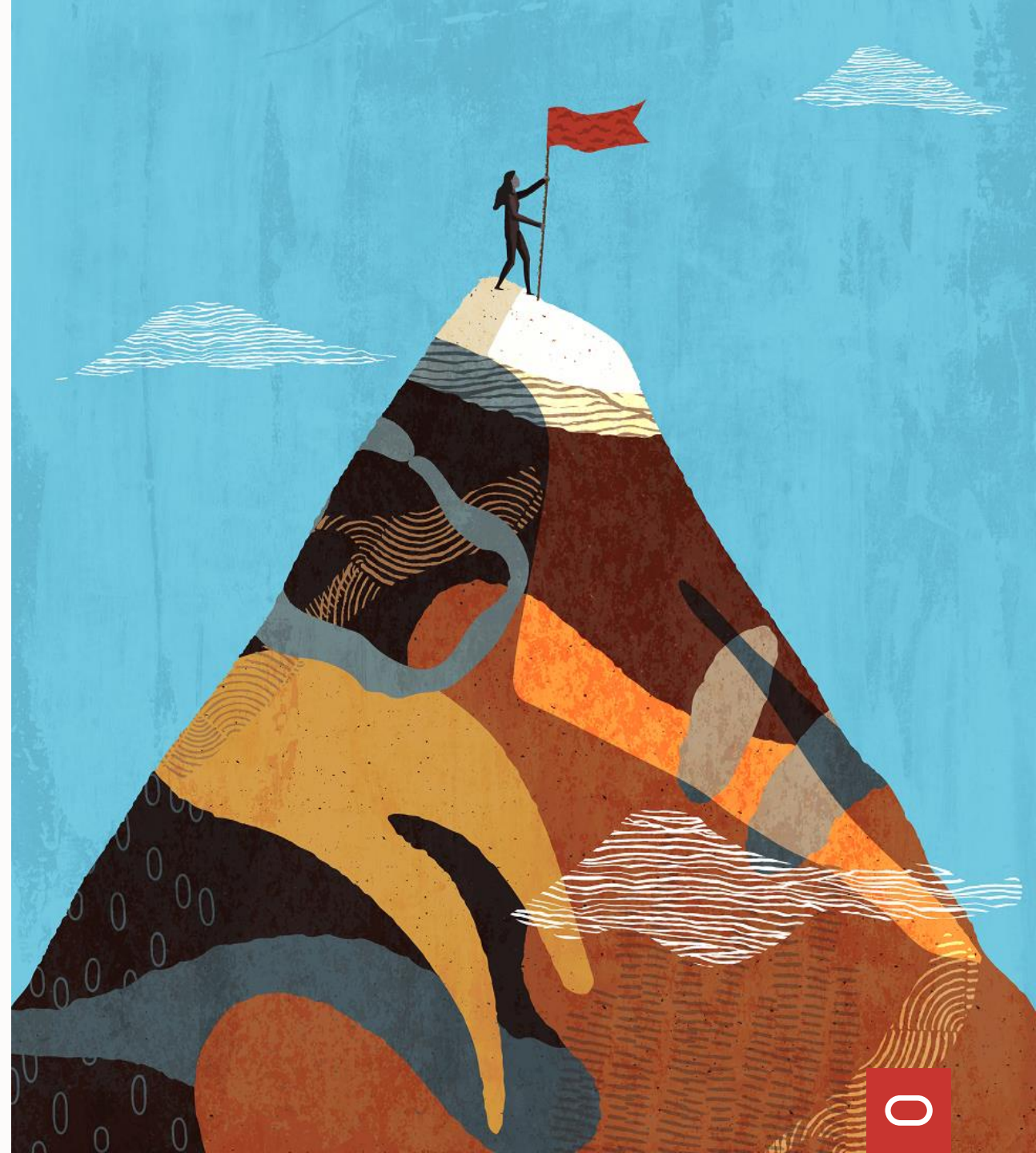18 customer presentations in the Siebel CRM Virtual Summit

Agenda

1   Customer Success Highlights

2   Recent Innovations

3   Strategy – What's Next

# Customer Success

Highlights & Surprises

ORACLE CLINICAL TRIALS PLATFORM

SIEBEL CRM CLINICAL TRIALS 20.x

Oracle is one of the world's leading suppliers of Clinical Trial systems.

Siebel CRM Clinical Trials is a core component of Oracle's Clinical Trials industry solution.

Runs as a SaaS-style cloud application with subscription based licensing.

In the present COVID-19 crisis, Pfizer is using our cloud platform for COVID-19 trials. GSK & Gilead are using our on-premise solution.
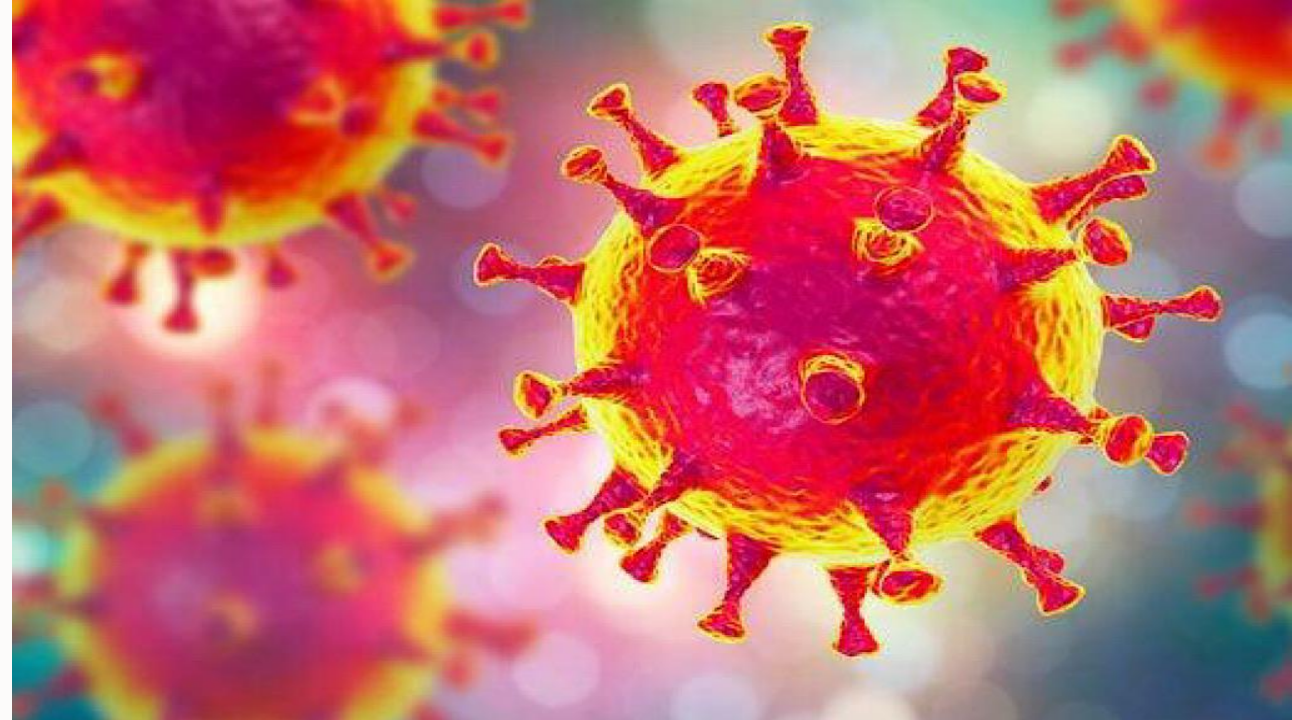
Fight against COVID-19: Joining forces with our customers

Top Pharma companies are using Siebel CRM for COVID-19 Clinical Trials

Customer Success for Clinical Trials
Thursday 24 September, 09.00 PDT

Agile CI/CD - Daily Updates to Mission-Critical Relationship Management Application

ORACLE PLATFORM

SIEBEL CRM FINANCIAL SERVICES

Mission-critical Siebel CRM application used for Relationship Management

Recent upgrade to 19.x with fantastic ROI

In 2015 deployed quarterly, last few years fortnightly and with 19.x (2020) deploy daily updates to production.

Use the cloud platform of Azure DevOps, CI/CD Pipelines and Repos to auto-deploy updates

15,000
concurrent customer service agents

Customer Leadership Panel – Zero Downtime
Tuesday 15 September, 09.00 PDT

![TELKOMSEL]

New Siebel CRM implementation set to be one of the largest deployments worldwide

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ORACLE PLATFORM

SIEBEL CRM COMMUNICATIONS | SERVICE | ORDER MANAGEMENT

Siebel CRM net-new license deal, go-live in mid April '20 with 19.10

The largest Telco in the planet's 4th largest country (Indonesia).

Set to be one of the largest Siebel CRM deployments worldwide by data, txn volumes.

Siebel CRM latest release enables remote working and deployment at extreme scale

Telkomsel went live during the Covid-19 pandemic which saw over 100+ staff all having to work remotely during the go-live deployment phase.

Customer Leadership Panel – Business ROI
Tuesday 15 September, 20.30 PDT

Extreme Scale: Data can Drive Strategic Advantage

SBERBANK

Largest Siebel CRM deployment in the world

Data monopoly: 70% of Russians bank with Sberbank (~100m people)

Everything is transacted in Siebel CRM – 50m Activities in Corp. (smallest instance)

120k concurrent users across 2 instances (Corp. & Retail)

100+ TB of data (30 in Corp. instance, 80 in Retail)

300+ system integrations in the Retail instance

150+ developers (15 scrum teams) in-house, at least 150 outsourced (Russian SIs)

GM

Use Siebel CRM 20.2 as their platform for Urban Mobility

Already seeing IoT and Connected Cars creating huge amounts of data:

- 10 TB per car, per day
- 10m cars per year = 100m TB per day

24+ TB customer data in one of 5 instances

Presents a huge challenge for integration and real-time insights – experience apps will move to Edge

Large in-house investment in data science to resolve complex big data integration challenge

American Airlines

One of the largest loyalty schemes in the world running on Siebel Loyalty

Siebel 19.12 running on OCI

100M Advantage loyalty members

15+ TB of data

30k Call Center transactions/day

10M Inbound service calls/day
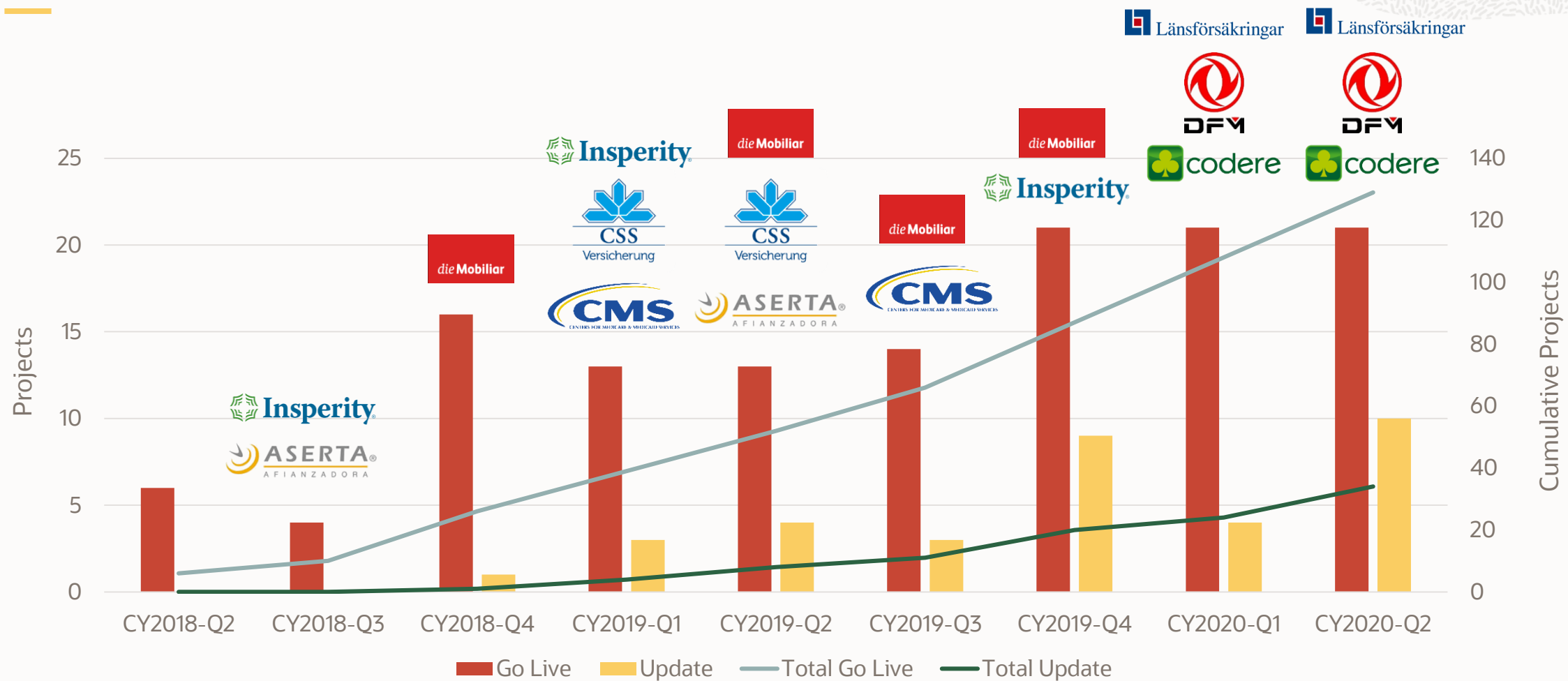
2.5M Real-time transactions/day

- Response time 0.5 seconds or less
- 540,000 Daily Customer Users/Real time Calls

22 Real-time Interfaces

26 Batch Interfaces

Customer Leadership Panel – Zero Downtime
Tuesday 15 September, 09.00 PDT

Agility - Updates not Upgrades

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Sample Customers Live with the Continuous Release Model

Innovation

Agility, Zero downtime, DevOps, UX, Mobile

Value & ROI Delivered from Customer-Driven Innovations

Poll

1. Flexibility – how frequently do you deploy Siebel?
2. Infrastructure – what's your position on Cloud for Siebel CRM?
3. Downtime – how long do you take to deploy application updates?
4. Rapid Deployment – are you deploying Siebel CRM with Containers & Kubernetes?
5. User Experience – what do you use Siebel UI for? (select multiple)

(see appendix for results)

Key Innovations for Customer Success

Value & ROI Delivered from Customer-Driven Innovations

Available

PARALLEL DEVELOPMENT
New seed data framework and Workflow deployment

SEAMLESS UPDATES
Monthly Release Updates & Seamless Repository Framework eliminates need for IRM
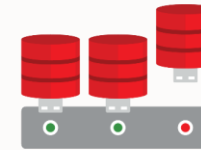
CONTAINERS
The ability to run Siebel CRM as Containers orchestrated with Kubernetes

CLOUD INFRASTRUCTURE
Reduced TCO - Move & Improve Siebel CRM by deploying to Oracle Cloud Infrastructure
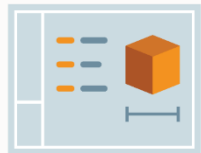
WEB TOOLS
Web Tools evolution with Script Debugger, Task & Workflow Editors and Simulators

AUTOMATION
Rest API Enabled CI/CD Components & Test Automation

OPEN UI
Flexible UX framework continues to support business-tailored, intuitive UI development

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

User Experience

- Siebel OpenUI – modern UX framework continues to thrive providing the ability to create tailored user experience across all form factors

- Successful customer UX projects deliver ROI – Die Mobiliar, a Swiss insurance company improved productivity by 75%

- New Smartphone UX for Siebel CRM ready to launch

- Oracle have announced "Redwood" a UX concept that all applications will look to adopt as a standard interaction model
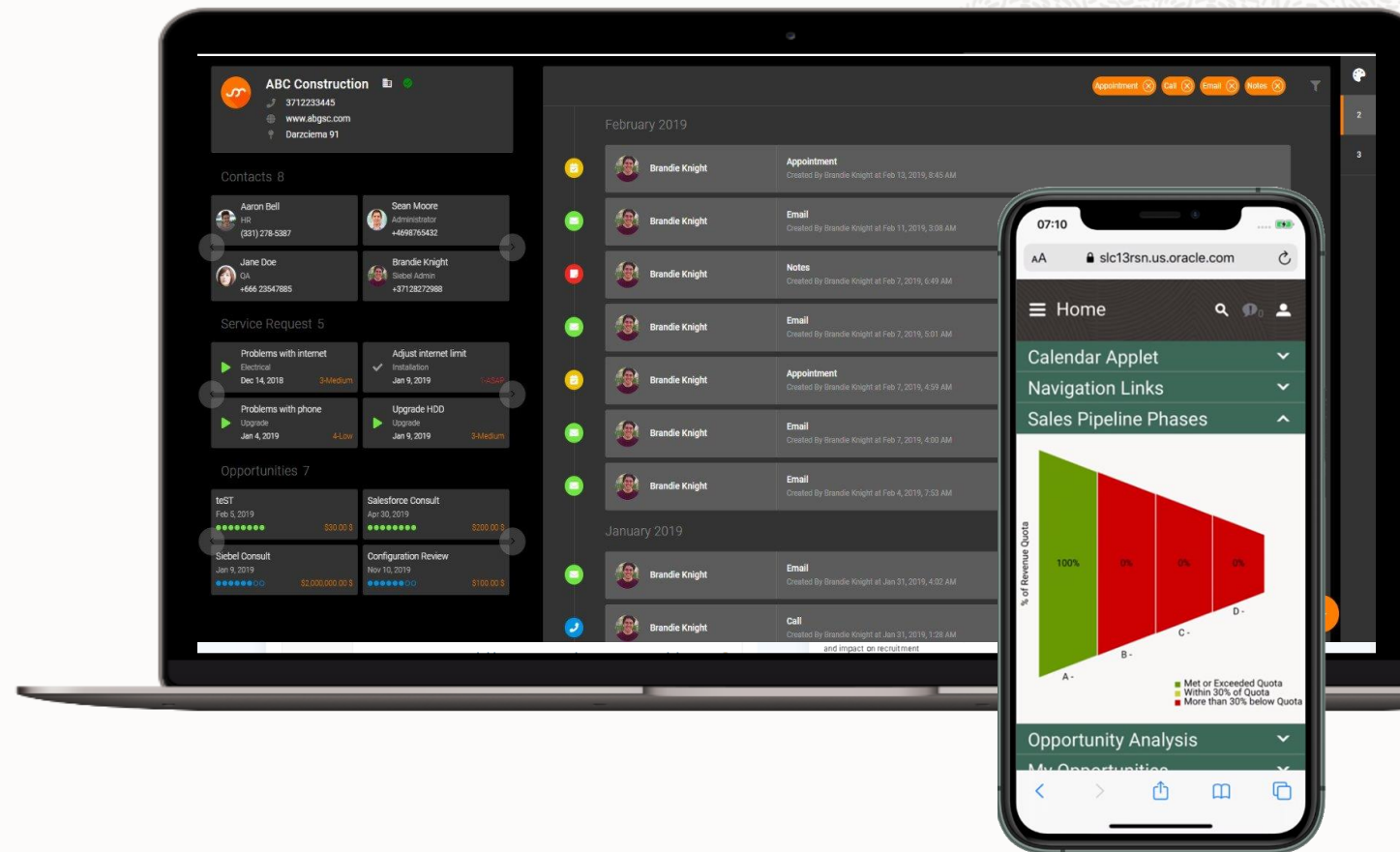
Siebel CRM on Phone
Redwood UX
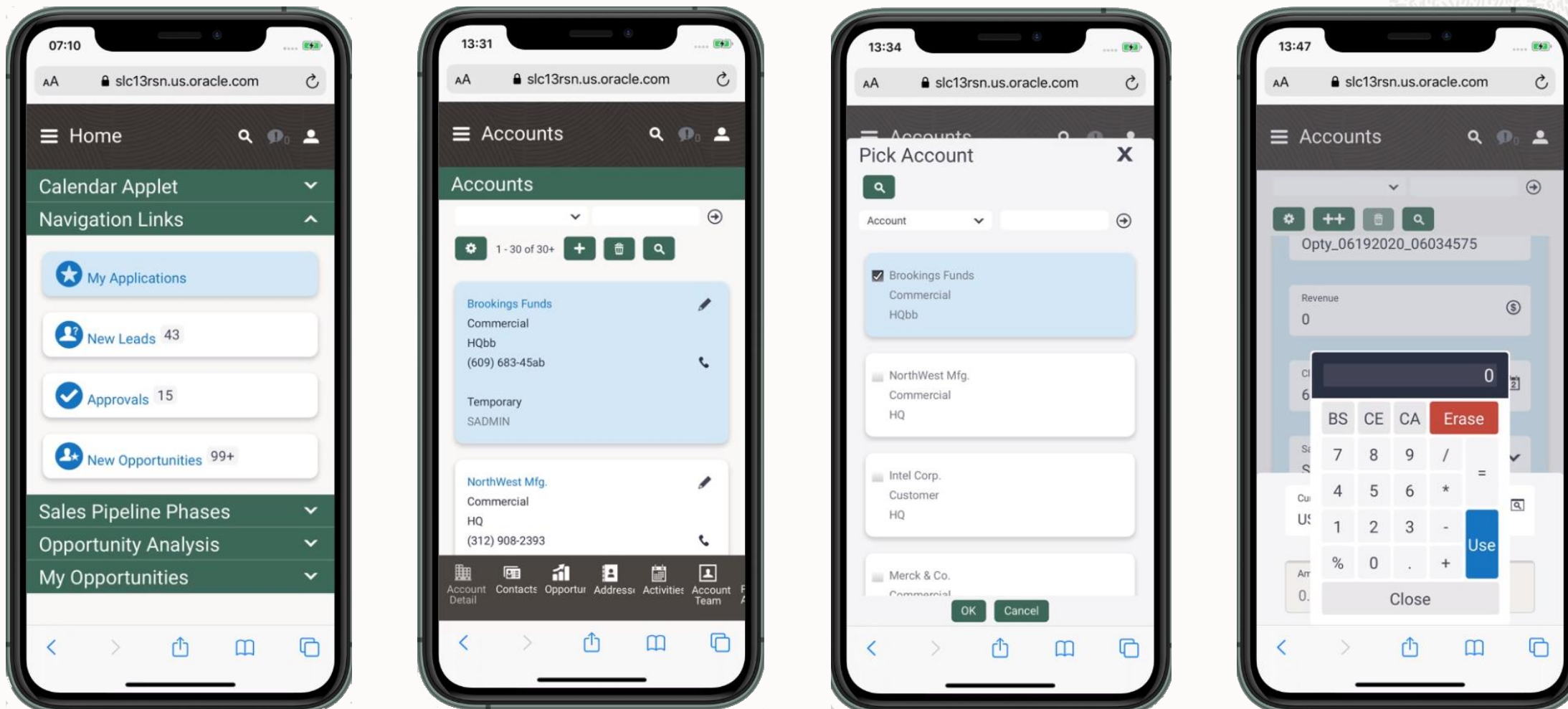
Parallel Development – Simplified & Agile Application Design

Using Workspaces – Large Scale – Agile Releases

Centralized, version-controlled repository that supports multiple developers/teams to work concurrently on multiple releases and/or projects

CY20: Framework for Seed Data Completion

Supports parallel deployment & testing as well as migration across environment
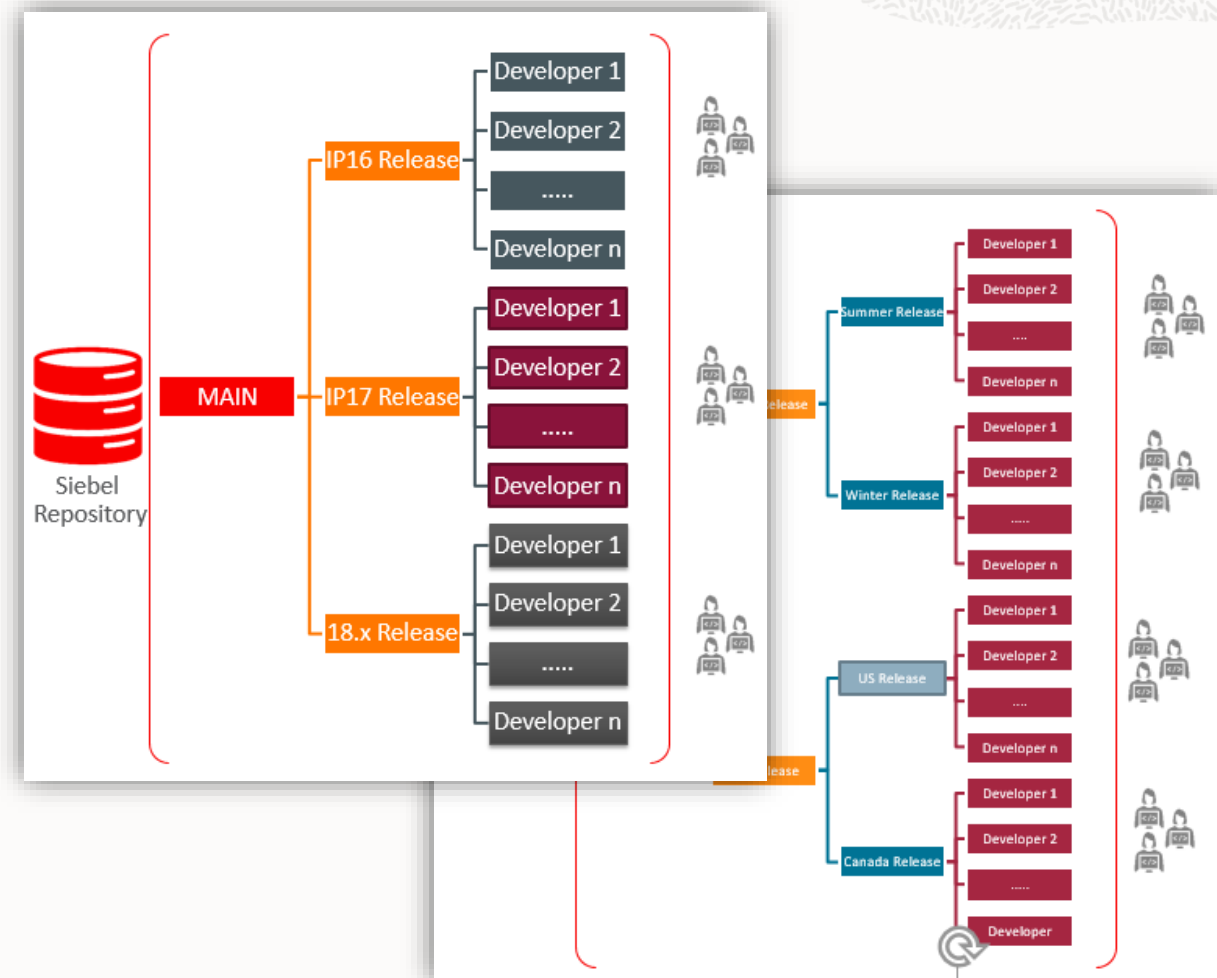
Always On: Near Zero Downtime

Key Value Realised

- The latest versions of Siebel CRM support high availability, with load balancing and clustering at multiple layers of the stack
- From IP2017+, incremental repository changes can be delivered without bringing down Siebel services
- No SRF, No Server restart, Migration tooling = near zero downtime
- Customers are achieving real zero downtime for some application updates.

Canon

Siebel CRM IP 2016 to 18.8 Upgrade.

96% reduction in time taken to apply an update – from 4 hours to 10 minutes

Rabobank

Upgrade to 19.x (2020) now deploy daily updates to production.

Use the cloud platform of Azure DevOps, CI/CD Pipelines and Repos to auto-deploy updates

die Mobiliar

Siebel CRM IP 2015.18 to 19.3 Upgrade

Reduced downtime from ~4h to ~1h

Deployment IP15 ↔ IP18/IP19 & the way to "zero-downtime"

Downtime vs. Releases

Source: OpenWorld 2019
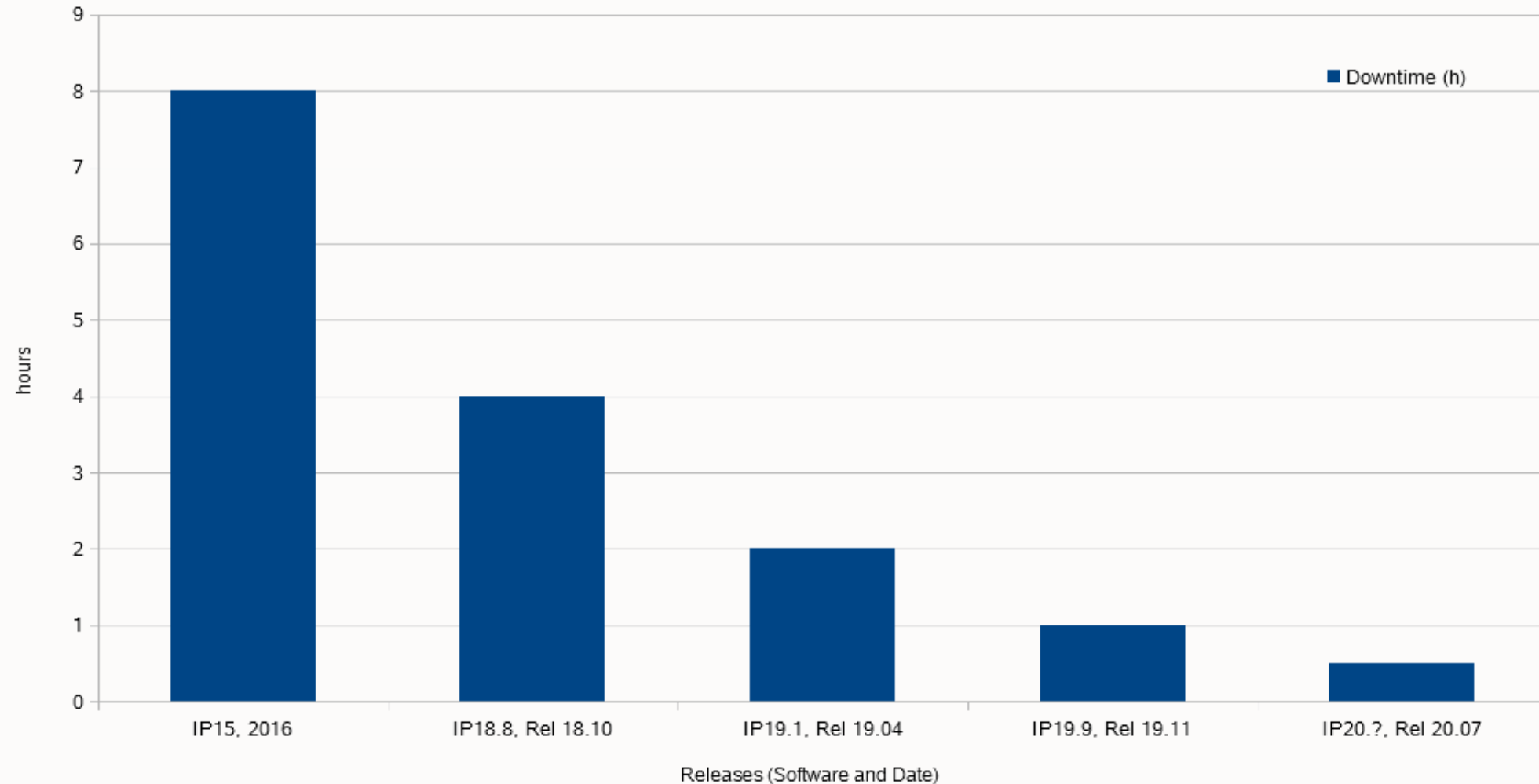
Simple, Rapid Deployment

Key Value Realised

- Run Siebel CRM as Docker containers On Premise or in the Cloud
- Rapid installation of a complete Siebel CRM Enterprise can now be done in **15 minutes**
- Apply Siebel CRM monthly releases to an existing deployment in less than **15 minutes**
- Further enhancements on the way to improve Kubernetes deployments

T · ·Mobile·

50% reduction in Maintenance costs

40% reduction in Operations costs

75% reduction in Hardware resources

Spark nz

Running Siebel CRM containerization for non Production environments, including Kubernetes (OKD)

Using Azure DevOps Pipelines to orchestrate

Lufthansa Cargo

Leading Airline runs Siebel CRM on Oracle Cloud Infrastructure with Kubernetes. **Reduced TCO by 15%**

Recent Customer Upgrades & Implementations at Scale

Emirates NBD

One of the Top 5 Banks in UAE

Consolidated 3 Siebel installations in to a single instance on 20.3

Everything is transacted in Siebel CRM – Account, Contact Management, Personal, Retail Banking and Insurance

15k concurrent users

22 TB+ TB of data (Structured & Un Structured)

50+ REST O/B Banking Open APIs

20+ Insourcing of development with Siebel Agile Features – Parallel Dev, Test Automation

500k+ Inbound service calls/day

CMS — Centers for Medicare & Medicaid Services

Centers for Medicaid & Medicare Services (CMS)

Successful Upgrade to 19.x in 4.5 months for America's government healthcare organization

Administers the nation's major healthcare programs including Medicare and Medicaid

24/7 operation and sophisticated disaster recovery solution

10k Call Center concurrent users

1 M+ Millions of external web users

1 B+ Over 1 billion Activity records

100+ interfaces with a large number of mainframe systems

BT

Always on, high availability solution with Siebel CRM and GoldenGate

Recent upgrade to Siebel 19.8 ensures maximum uptime

90% reduction in planned service time outages

800 concurrent users

120k orders / day

20k faults (service requests) / day

10 TB each database instance

2 instances deployed using Oracle GoldenGate or zero downtime switchover during application updates

Strategy & Roadmap

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What's Next?

Example: Communications in the Digital Age
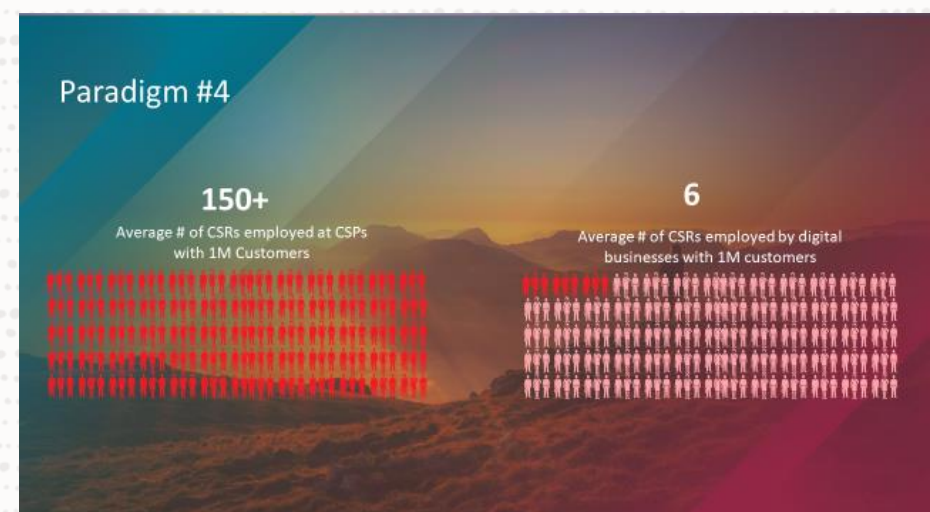
Siebel as a Service

Leverage Siebel components & Redwood for advanced customer UX & intelligence asks

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

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

AUTOMATION
Rest API Enabled CI/CD Components & Test Automation

REDWOOD
Redwood UX design will sit around Siebel Services for advanced industry UX use cases & processes

EXTREME SCALE
Advanced scalability, resilience and elasticity with cloud native modern architecture

Siebel as a Service : Application-based Componentization

Industries

HCM	Fusion Cloud & Siebel CRM Services		ERP

Consumer Goods	Clinical	Public Sector	Energy
Automotive	Insurance	Healthcare	Media
Pharmaceuticals	Medical	Institutional Finance	Airlines
Communications	Retail Finance	High Tech & Manufacturing	Hospitality

Horizontals

Customer Master	Marketing	Sales	Order Capture	Service	Loyalty

Platform

Object Manager	UI Server	EAI – REST & SOAP	Security	App Dev

DB

Microservices Serving

1. Experience channels (UI)
2. Integrations (Back Office)
3. Data source

Defining a Modern Architecture for Siebel CRM

"Cloud Native"

Cloud native technologies empower organizations to build and run scalable applications in modern, dynamic environments such as public, private, and hybrid clouds.

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Containers, service meshes, microservices, immutable infrastructure, and declarative APIs exemplify this approach.

Siebel CRM Cloud Native Architecture
Wednesday 23 September, 09.00 PDT

Cloud Native Siebel CRM Unleashes transformational opportunities

	top-line	bottom-line
increase agility and speed for innovation	react to market needs	lower cost of innovation
increase revenue with lower cost of downtime	improve customer sat	lower downtime cost
reduce platform/skills risk and cost of IT	highly adaptable infra	reduce OpEx costs
modern platform to embrace change	simplicity of change	no greenfield CRM

Journey to Microservices and Beyond

We are here

Phase 1

Cloud Enabled

- Siebel CRM fully supported on Oracle Cloud Infrastructure
- Cloud@Customer
- Architecture updates i.e. Application Interface and Gateway

Phase 2

Containerization

- Siebel CRM available as Docker Containers
- Able to run on-premise or on-Cloud
- Continuous Delivery with Monthly Updates being released as Containers

Phase 3

Industry Solutions

- Cloud Native architecture
- Modular Server components and Object Managers running as Containers
- Rest API enabled
- Large scale and elastic
- Blended solution stack with "Redwood" UX, CX Fabric, Siebel CRM
- Minimum risk, maximum re-use and amplification of rich Siebel CRM industry processes
- Ability to run on-premise or on-Cloud

Phase 4

Microservices

- Finer grained Services
- Event Driven Publication Subscription capability
- Ability to independently evolve individual Siebel Microservices
- Adaptable to new CX Industry solutions or custom solutions

Siebel CRM Infrastructure ➡️ Cloud Native Infrastructure

Siebel CRM deployments across Business Units

Web Servers | **Siebel Gateways** | **Siebel Enterprise Servers**

SVC — Siebel Call Center Service
Siebel Call Center Object Manager
docker

SVC — Siebel Order Capture Service
Siebel C/OM Object Manager
docker

SVC — Siebel Loyalty Service
Siebel Loyalty Object Manager
docker
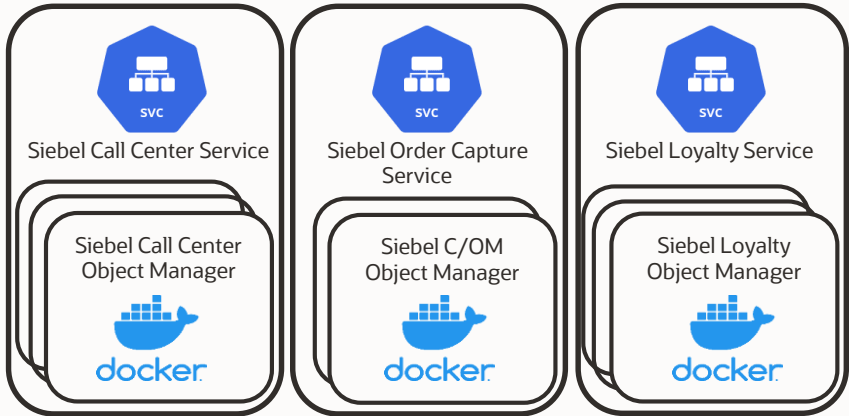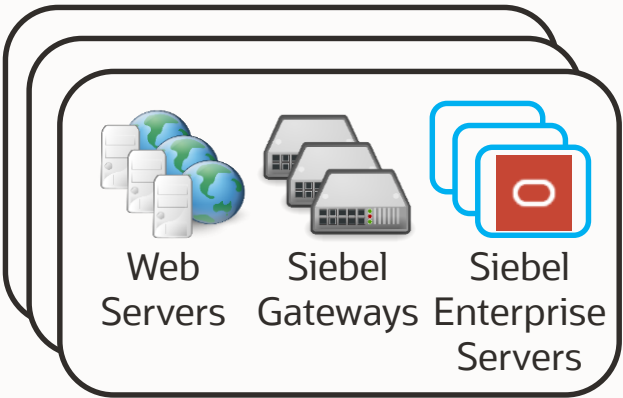
Technology

VM | Bare Metal | Docker | Kubernetes

Docker | Oracle Container Engine for Kubernetes | Kubernetes

Infrastructure

On Premise | Private Cloud | Public Cloud
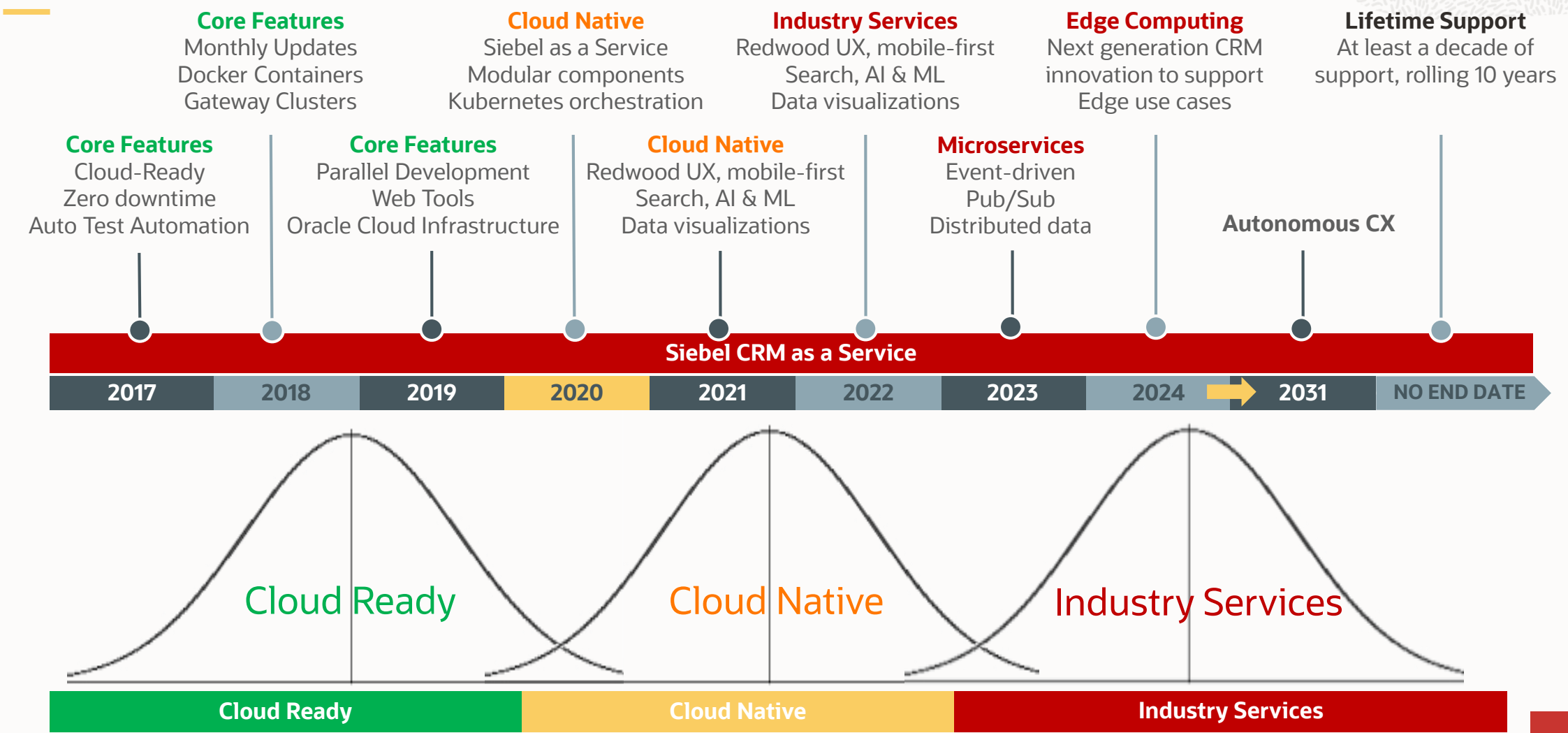
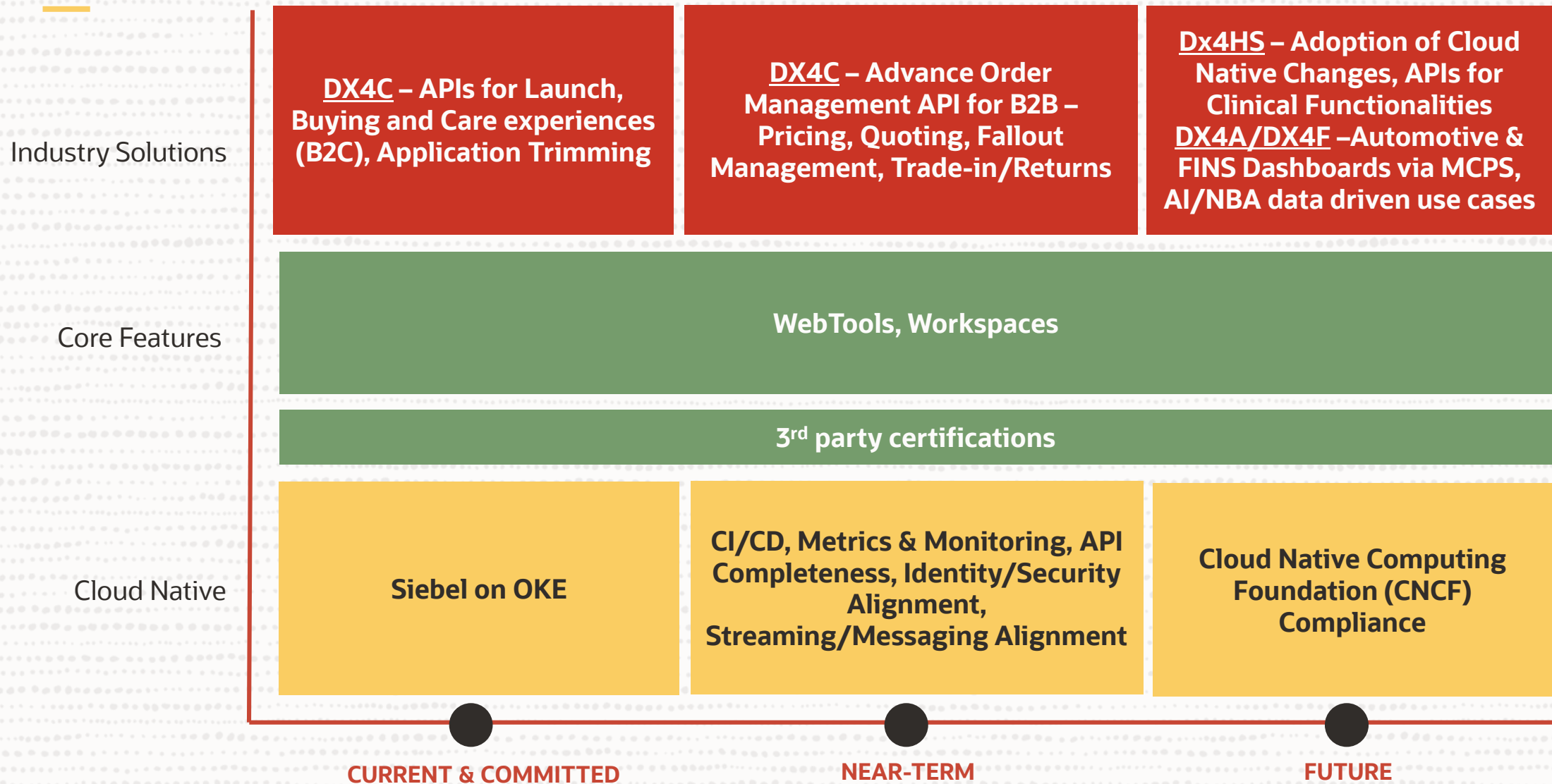On Premise | Private Cloud | Public Cloud

Siebel CRM Cloud Native Architecture
Wednesday 23 September, 09.00 PDT

Order Capture Components

Persistent
Shopping Cart

Unified
Sales Catalog

Agile
Product Configurator

Simple & Complex
Customer Order Management

Comprehensive
Asset Based Ordering

- Shopping Cart
- Abandon Cart Follow-up
- Cart Context
- Purge Cart
- Products
- Pricing
- Channel Templates
- Business Rules
- Bundles
- Compatibility Rule
- Eligibility Rule
- Pricing based on Configuration
- Order Capture
- Product Recommendations
- Revision / Follow-On
- Pricing Rule
- Configure, Price and Cart
- Cancelation
- Bulk Order
- Cross-Products Constraint Rule
- Searchandising
- Order Orchestration
- Merchandising
- Configuration Scope
- Suspend & Resume
- Upgrade & Downgrade
- Purge Orders
- Asset Master
- Modify
- Move
- Copy, Pause, Resume & Retry Orders
- Terminate
- Bulk Action
- Penalty

Strategy : Continuous Innovation & Oracle Investment

Core Features
Monthly Updates
Docker Containers
Gateway Clusters

Cloud Native
Siebel as a Service
Modular components
Kubernetes orchestration

Industry Services
Redwood UX, mobile-first
Search, AI & ML
Data visualizations

Edge Computing
Next generation CRM
innovation to support
Edge use cases

Lifetime Support
At least a decade of
support, rolling 10 years

Core Features
Cloud-Ready
Zero downtime
Auto Test Automation

Core Features
Parallel Development
Web Tools
Oracle Cloud Infrastructure

Cloud Native
Redwood UX, mobile-first
Search, AI & ML
Data visualizations

Microservices
Event-driven
Pub/Sub
Distributed data

Autonomous CX

Siebel CRM as a Service

| 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2031 | NO END DATE |

Cloud Ready

Cloud Native

Industry Services

| Cloud Ready | Cloud Native | Industry Services |

Product Roadmap – Siebel CRM

Industry Solutions	**DX4C** – APIs for Launch, Buying and Care experiences (B2C), Application Trimming	**DX4C** – Advance Order Management API for B2B – Pricing, Quoting, Fallout Management, Trade-in/Returns	**Dx4HS** – Adoption of Cloud Native Changes, APIs for Clinical Functionalities **DX4A/DX4F** –Automotive & FINS Dashboards via MCPS, AI/NBA data driven use cases
Core Features	**WebTools, Workspaces**		
	3rd party certifications		
Cloud Native	**Siebel on OKE**	**CI/CD, Metrics & Monitoring, API Completeness, Identity/Security Alignment, Streaming/Messaging Alignment**	**Cloud Native Computing Foundation (CNCF) Compliance**

CURRENT & COMMITTED   **NEAR-TERM**   **FUTURE**

Product Roadmap – Siebel CRM

◤ Cloud Ready
◤ Cloud Native
◤ DX4I

	Q1FY21	Q2FY21	Q3FY21	Q4FY21
Industry Solutions	**DX4C BuyingX– B2C Order –** ABO, Quoting, B2B Quoting-Complex BS	**DX4C B2B** - Complex Product & Network Product Ordering	**DX4C Non Functional** - Multilingual Support for REST API	**DX4C Complex Pricing** – Formula & Contract with Installmt & Finance
	DX4C BuyingX – B2C Configurator & E&C, Fallout Mgmt., Order Rev.	**DX4C B2B** Agreement – Complex Agreement with Hierarchy	**Migration** of Siebel Cust. to Dx4C – Data & Extension Migration	**DX4C Trade-ins & Returns** Subscription & Renewal Terms
	DX4C – Align Data Visibility & PSR Support Tier-1 Store Front	**DX4HS** – Cloud Native Adoption for Clinical – Faster Go To Market	**DX4HS** – API Clinical Trial Productivity & UX – Brand Building	**DX4A, Dx4F** – Dashboards with C360 APIs of MCPS, Data Driven
Core Features	**Workspace** Preview & Deployment for **Workflows**	Parallel Development Support for **Workflow/Batch Components**, Workspace **Preview** & Deployment for **Tasks**		
	Script Editor and Debugger & **Workflow** Editor		**Taskflow** Editor & Web Tools Object **Validator**	Script **Validator** & Web Tools Object **Wizards**
	3rd Party Upgrades: Jackson, Log4j, Tomcat, Unzip	3rd Party Upgrades	3rd Party Upgrades	3rd Party Upgrades
Cloud Native Updates	**Siebel Batch Comp support as Kubernetes Job**	**Log Streaming and Telemetry –** Siebel Native Capability	**Footprint reduction –** Headless, Vertical, < 3rdparties, fast startup	**CI –** Fully Automated and per Vertical
	Liveness and Readiness Probes	**Zero Downtime Rolling Upgrade -** without customization	**Zero Downtime Rolling Upgrade -** with Customization	**API Platform Completeness –** Align with Oracle CNE Platform
	Event Driven Framework – Metadata & Scripted Pub Sub	**Helidon -** Migrate Application Interface from Tomcat	**Siebel Microservices –** Decomposition Guide/Features	**Siebel Access Control Completeness –** RBAC (CRMOD)
	20.6, 20.7 & 20.8	20.9, 20.10 & 20.11	20.12, 21.1 & 21.2	21.3, 21.4 & 21.5

ORACLE

Oracle Digital Experience for Communications
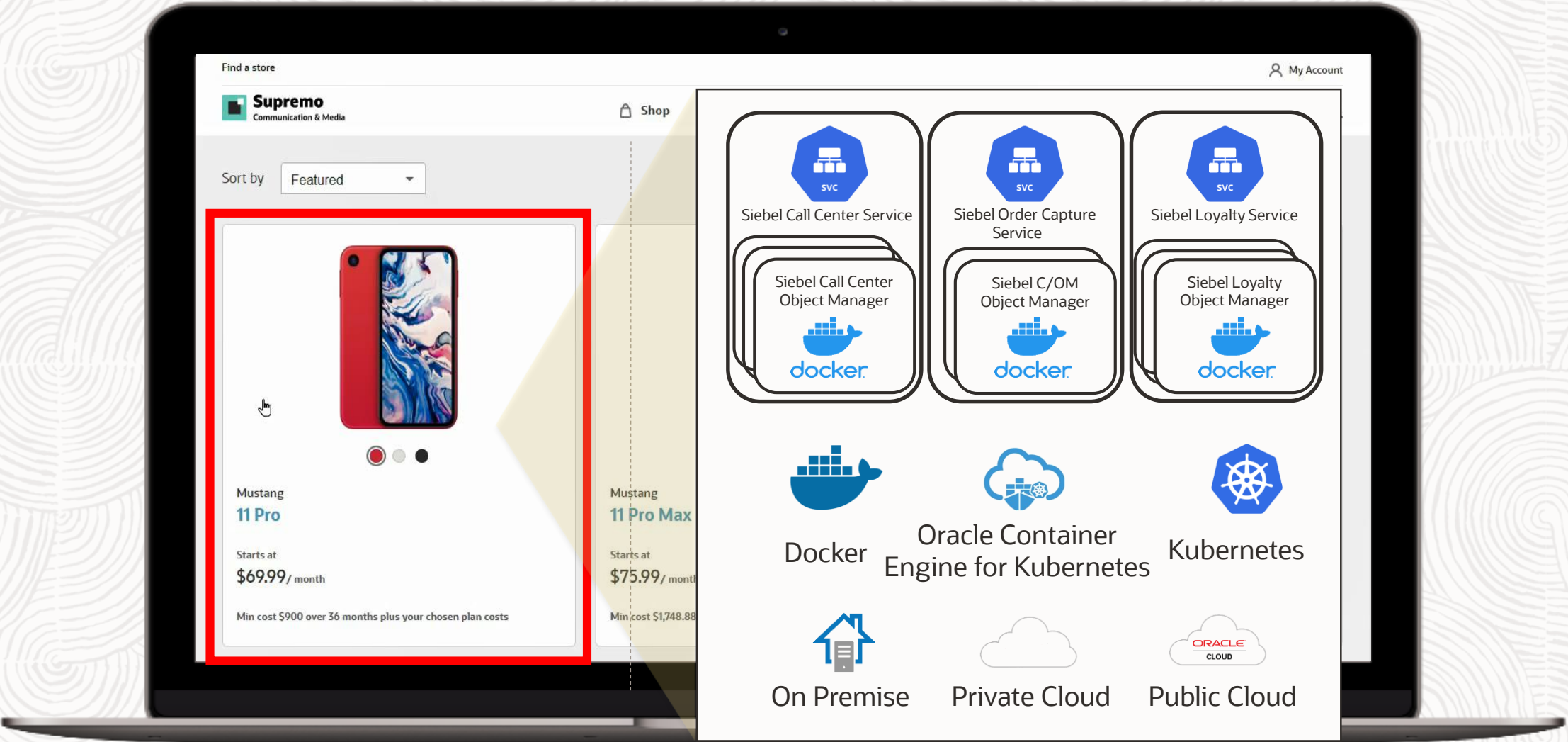
Launch, Buying & Care Overview Demo
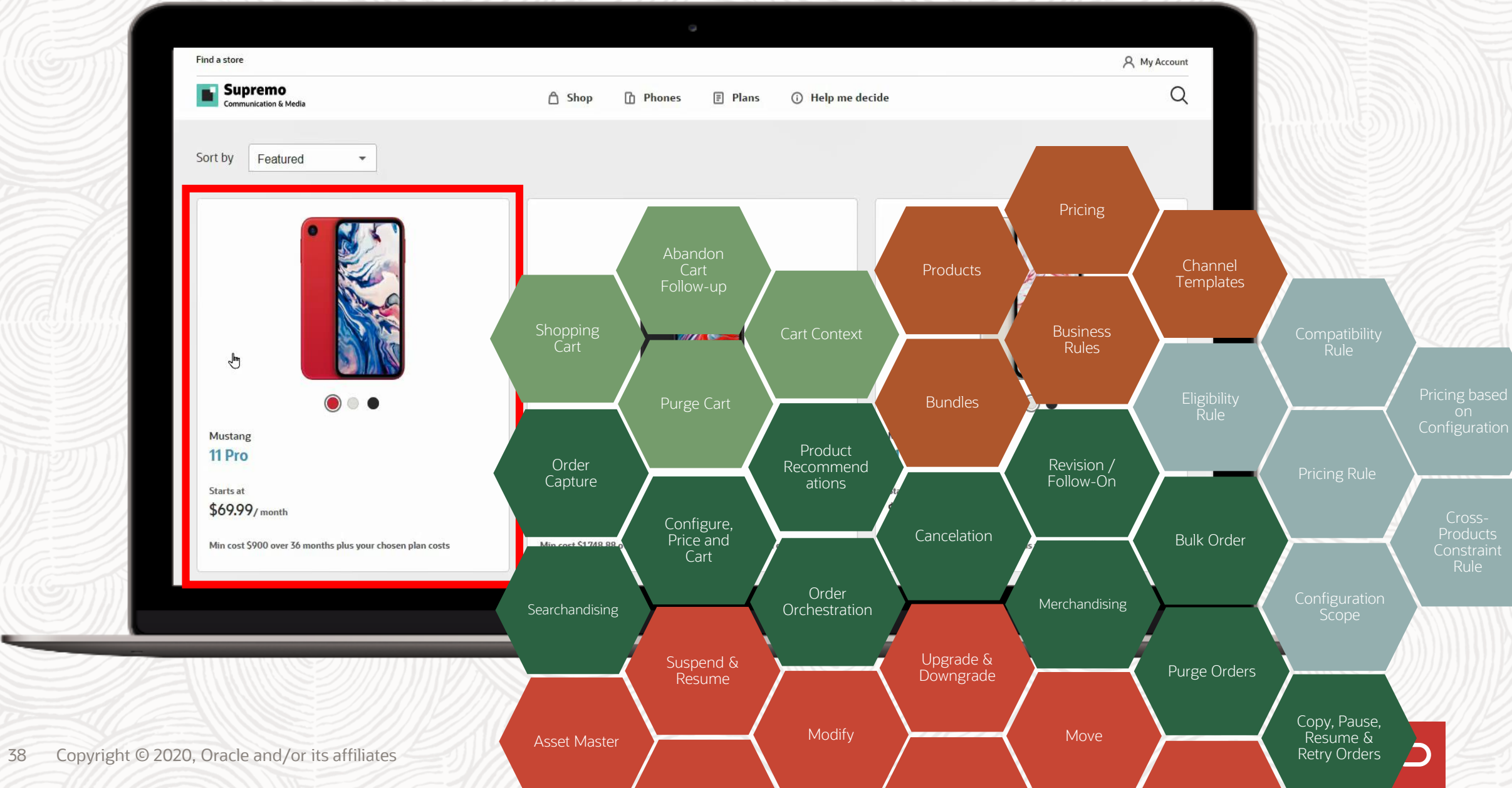
DX4C Product Management

July 2020

Omni-channel Shopping Cart

Omni-channel Shopping Cart

Key Takeaways

1 Our recent innovations have delivered fantastic ROI and value to our customers, justifying continued investment

2 Oracle has a clear strategy to guide Siebel CRM customers and help them to adopt Cloud solutions with minimum risk

3 Proven track record and customer success case studies – to get started – talk to the Oracle team

Take the Siebel CRM Innovation Survey

Let us help you kickstart your Siebel CRM transformation

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

Thank You

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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

Poll

1. Flexibility – how frequently do you deploy Siebel?
   - Daily
   - Weekly
   - Monthly
   - Quarterly
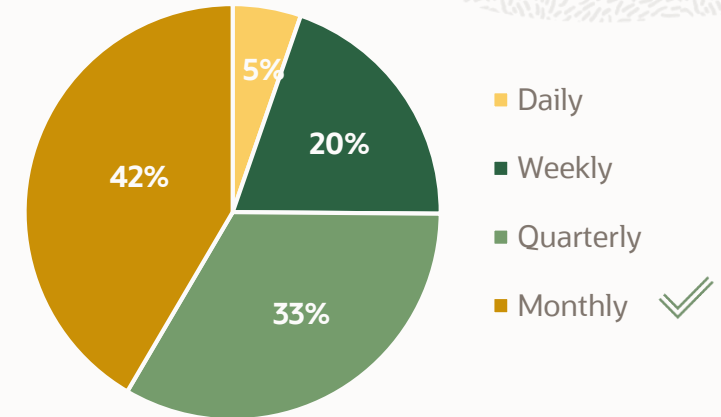
2. Infrastructure – what's your position on Cloud for Siebel CRM?
   - We are on-premise only
   - We are evaluating Cloud Infrastructure benefits
   - We will operate a hybrid approach with some Cloud instances
   - We are already running Siebel CRM on Cloud
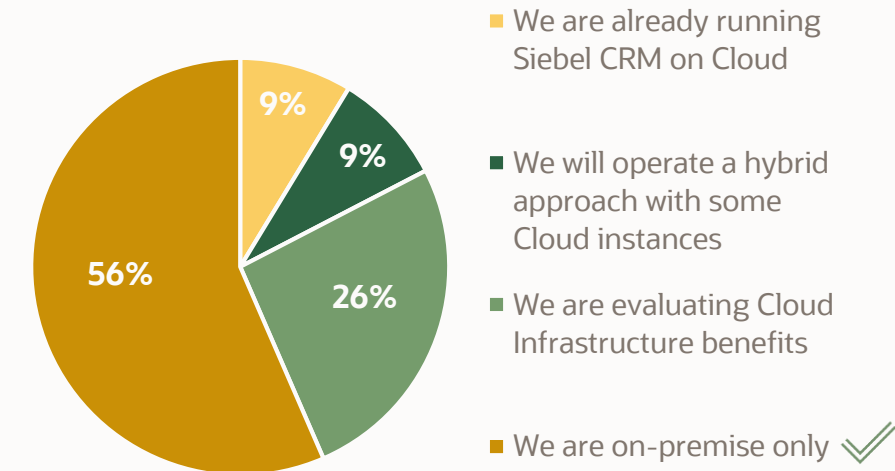
Poll

3. Downtime – how long do you take to deploy application updates?
   - Less than 1 hour
   - Less than 4 hours
   - Less than 8 hours
   - 1-2 days
   - More than 2 days
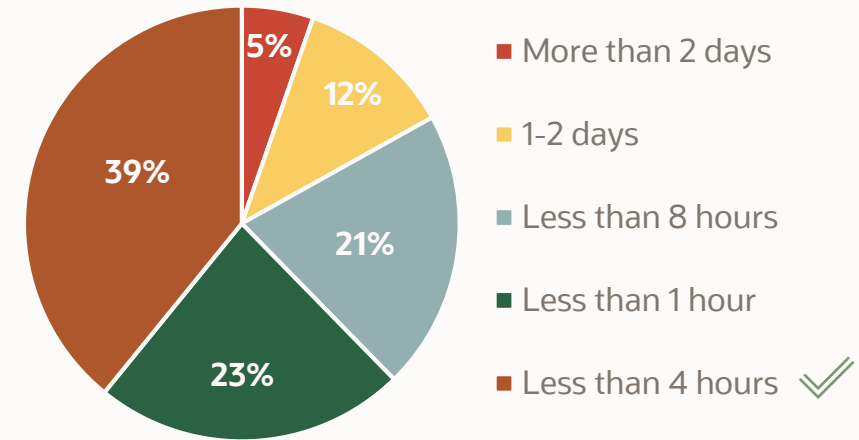
Poll

4. Rapid Deployment – are you deploying Siebel CRM with Containers & Kubernetes?
    - We are already running Siebel CRM with Containers & Kubernetes
    - We are currently evaluating the benefits of containerization
    - We are not considering containerization for Siebel CRM
    - With our platform it is not possible to run Siebel CRM containers

3%

14%

36%

47%
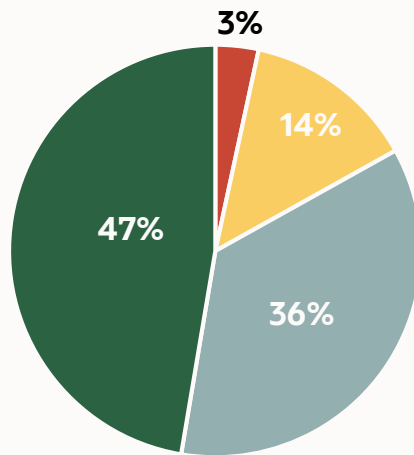
- We are already running Siebel CRM with Containers & Kubernetes

- With our platform it is not possible to run Siebel CRM containers

- We are not considering containerization for Siebel CRM

- We are currently evaluating the benefits of containerization ✓

Poll

5. User Experience – what do you use Siebel UI for? (select multiple)
   - Employees
   - Partners
   - Customers
   - Desktop-laptop
   - Tablet
   - Phone

Category	Percentage
Employees	90%
Desktop-laptop	62%
Customers	39%
Partners	33%
Tablet	21%
Phone	16%