


ORACLE®

CRM Analytics with Siebel 8.0



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Business Intelligence is a Top Priority

#1 priority with CIOs

Gartner 2006 CIO Survey

2006 CIO Technology Priorities

To what extent will your Investment in each of the following technologies change in 2006	Ranking 2006 2005	Spending Increase
Business Intelligence (BI)	1 ↑ 2	+4.8%
Security Enhancement Tools	2 ↓ 1	+4.5%
Mobile Workforce Applications	3 ↔ 3	+3.9%

Source: Gartner EXP 2006 CIO Survey

Merrill Lynch CIO Survey

Table 3: What areas are your top Spending Priorities

	Aug 2004	Oct 2004	Feb 2005	Sep 2005	Jan 2006
Business Intelligence / Data Warehousing	42%	48%	28%	53%	41%
Security	42%	42%	31%	27%	36%
ERP	12%	26%	32%	17%	28%

Source: Merrill Lynch Survey of 100 CIOs in North America



Product Strategy

Key Analytic Differentiators for CRM

- **Enterprise Semantic Model**
 - Cross-Source Model Centric vs. Single Source Reporting
- **Pervasive Business Insight**
 - Empower Business Users with Embedded Insight
- **Real Time Predictive Insight**
 - Activity Monitoring and Predictive Analytics for Real Time Decisions
- **Business Process Optimization**
 - Sense & Respond with Intelligent Business Processes
- **Fastest Time to Value & Lowest TCO**
 - Pre-packaged CRM Analytic Applications and Capabilities
 - Across Siebel, PeopleSoft, e-Business Suite, JDEdwards, & SAP

Key Contextual Metrics Embedded within Siebel 8.0

- ***Contextual***—metrics guide the customer interaction with data relevant to the customer. Metrics show the agent something about the customer that sheds light on their needs, preferences, or expectations
- ***Embedding***—agent does not have to take extra steps see informative data on the customer. Metrics are integrated into the contact center software user interface when the agent needs to see it.

Embedded Contextual Analytics

- Embedded in CRM transactional system
 - Analytics results within a transactional applet

The screenshot displays a CRM interface for a contact named James Manning. The top navigation bar includes tabs for Home, Accounts, Contacts, Service, Service Analytics, and Answers. Below this, a sub-navigation bar lists options like Contacts Home, Contacts List, Consumers List, Personal Contacts List, Charts, Manager's Explorer, and Contact Administration. The main content area shows the contact's details, including first and last name, job title, account, and various performance metrics. A red box highlights the 'Cost To Serve' and 'Profitability' fields, which are represented by dollar signs. A red arrow points from this box to a callout text area at the bottom right.





Field	Value
*First Name	James
*Last Name	Manning
Mr/Ms	Mr.
State	MD
Job Title	Manager, Information S
Account	Marriott International
# of Calls Last Year	20
% Calls Self Served Last Year	85%
AHT per Agent Call	581
Target AHT	600
Balance	\$9,145.83
Available Credit	\$15,854.17
Credit Limit	\$25,000.00
Easy Pay	✓
Cost To Serve	\$\$\$\$\$
Profitability	\$\$\$\$\$

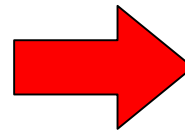
Profitability is calculated from Total Revenue and Costs (from Financial system)
Cost To Serve is calculated from costs gathered from CTI systems, Service Systems, etc.

More than just Dashboards & Reports

- **Action Links**

- Direct navigation from record to transaction while maintaining context
- Take Action immediately without navigating to a different screen

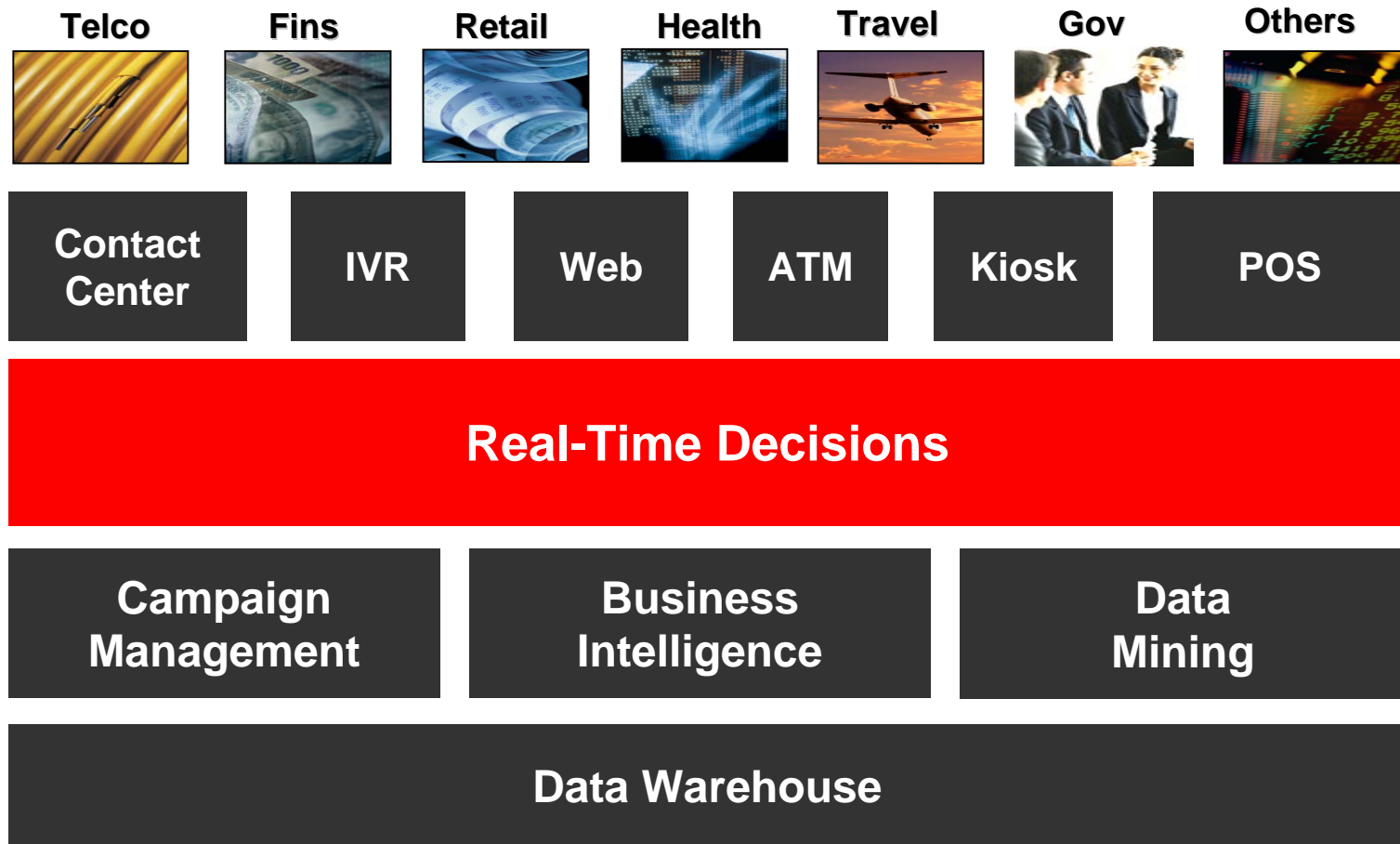
Age in Days	Priority	SR Number	SR Link
G: 61+ 	2-High	1-4CEL	
F: 46 - 60 	2-High	1-48IY	



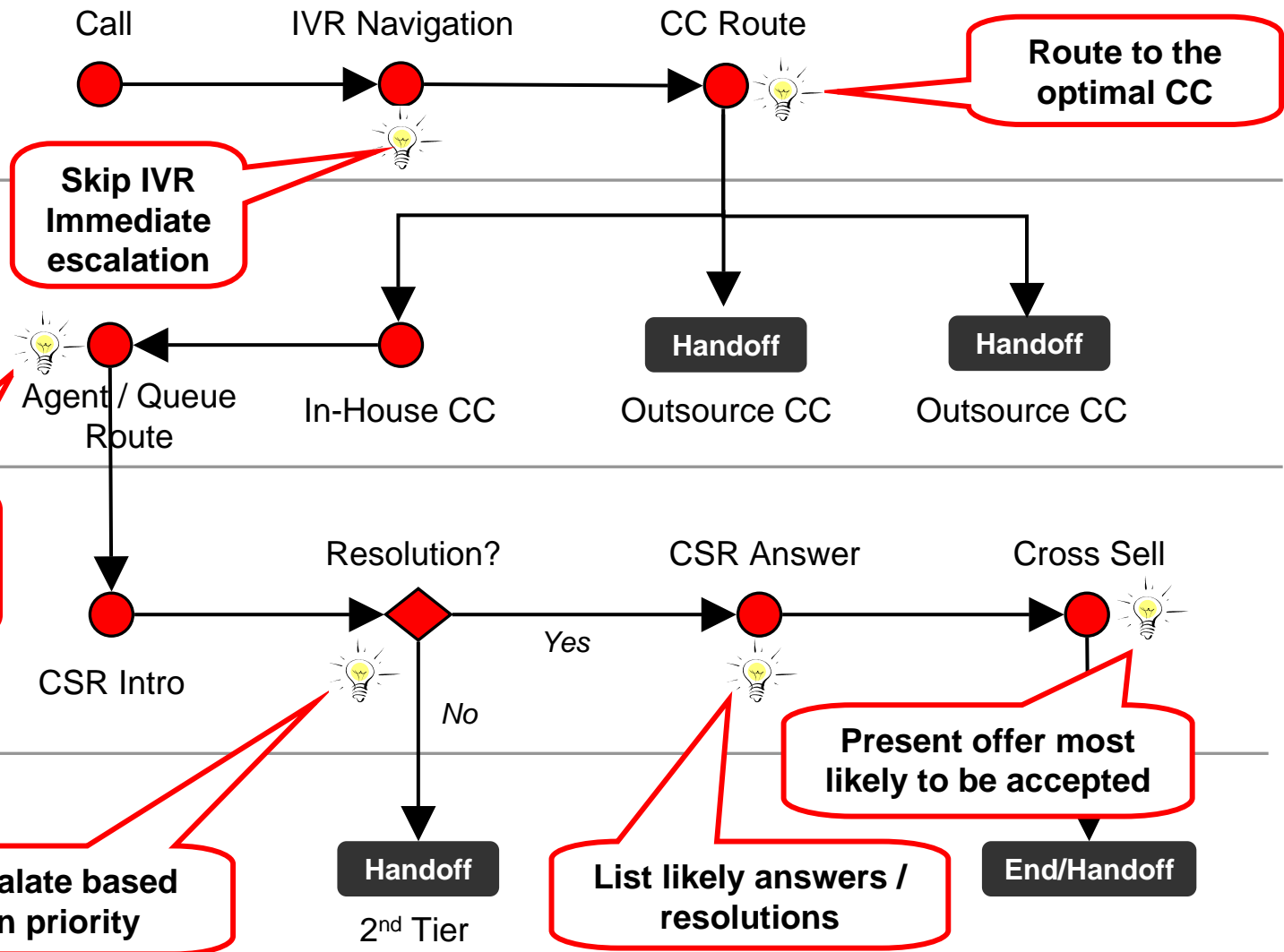
All Service Requests ▼				
New	SR #	Status	Su	
>	1-4CEL	Open	HD	

Oracle Real-Time Decisions

Embedding RTM into CRM Applications



Example: RTD in a CRM Process



Oracle BI Applications

CRM Analytics Enhancements for 8.0

- Enhanced User Experience
 - Benchmarks & Targets
 - Analytic Workflows
 - New Visual Indicators
 - Functional Glossaries
 - Enhanced Employee Hierarchy
- Enhanced Data Administration Console
 - Auto-dependency Rules Engine
 - Configuration Manager
 - ETL Monitor
- Expanded Deployment Options
 - Support Oracle EBS v11 v11i9 and v11i10
 - Support DB2 V8 on z/OS as both source and target database
 - Support Teradata V2R6 as target database
- Full Localization
 - Translation to 15 languages



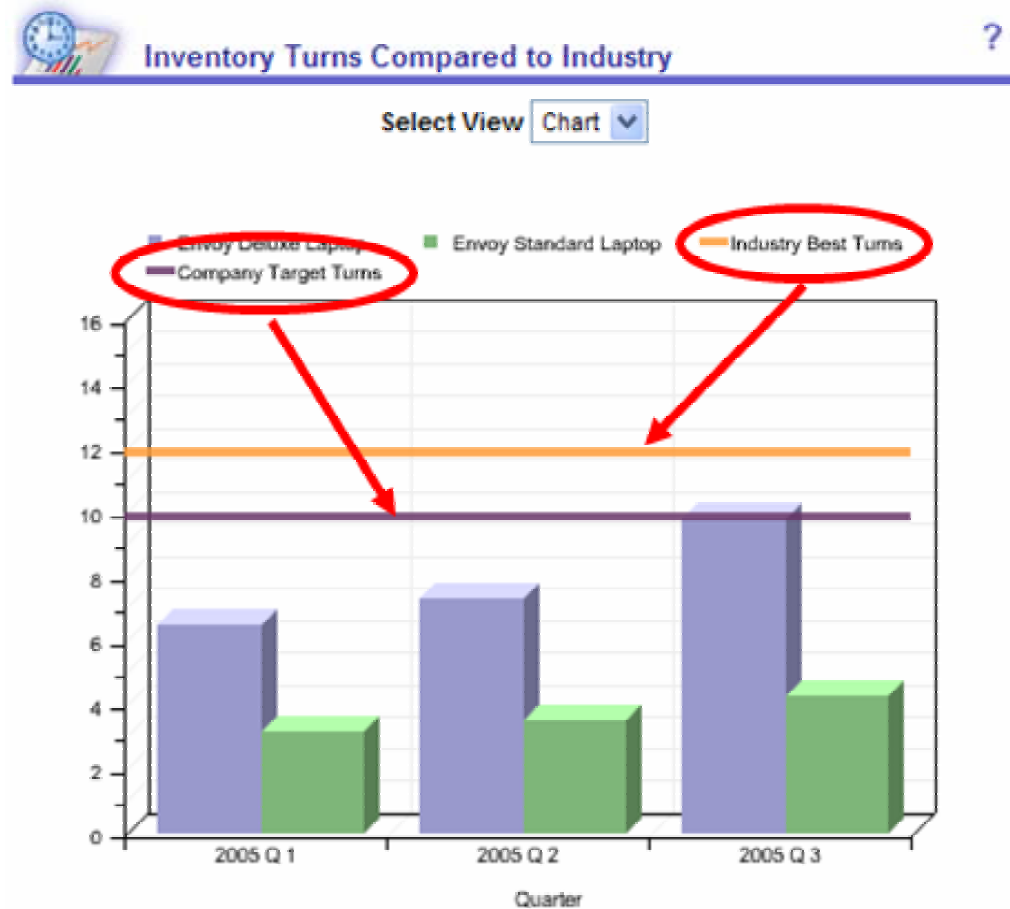
Enhanced User Experience

- All CRM Analytic applications take advantage of the latest capabilities including:
 - Benchmarks & Targets
 - Analytic Workflows
 - New Visual Indicators
 - Flexible Deployment Options

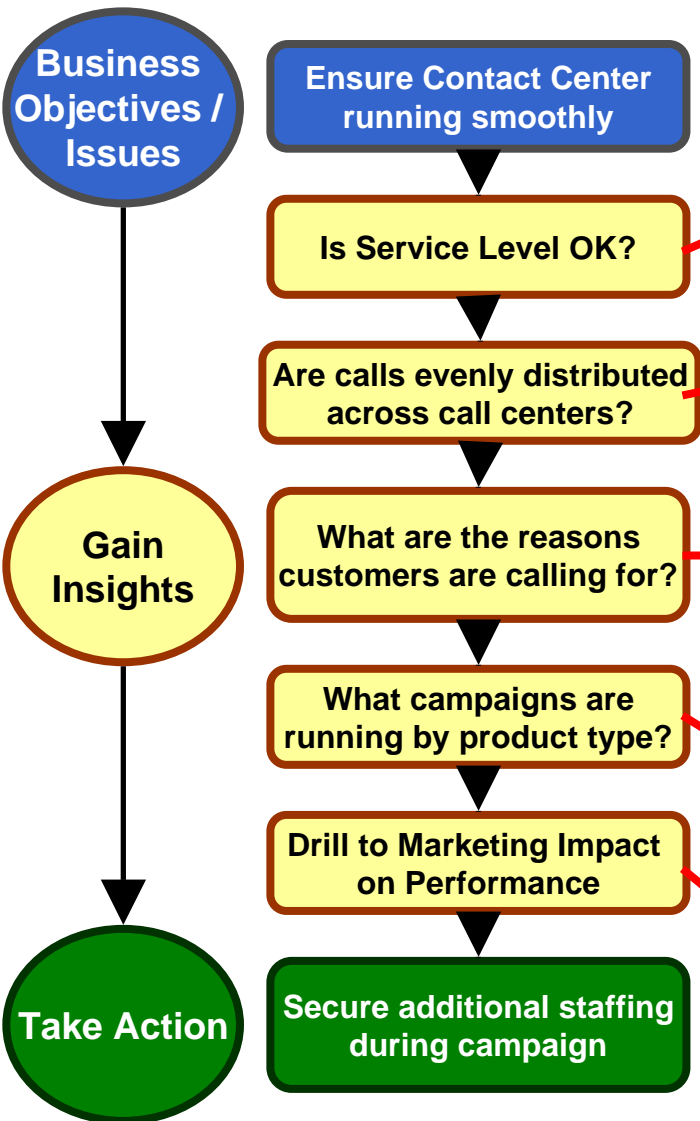


Benchmarks / Targets

- Flexible entry of external benchmarks, industry best goals or internal company targets
- Provides clear context to end users via visual indicators on whether the metrics are on target or not



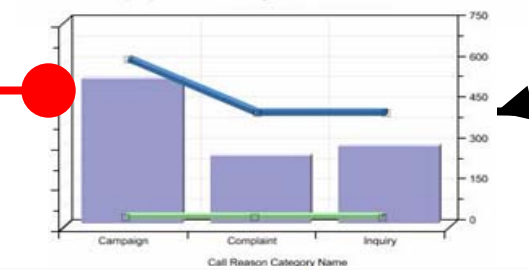
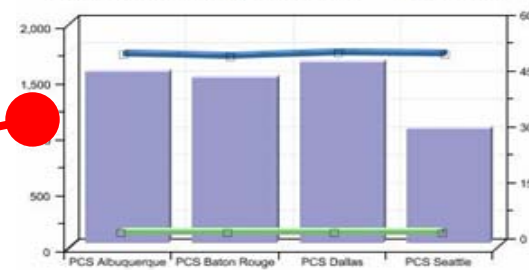
Analytic Workflows – Contact Center Telephony Analytics



Contact Center Today's Performance Dashboard

Service Level	Poor	Max Abandon
Average Call Volume per Day	OK	Max Speed of
Average Call Volume per Hour	OK	Max Answer C
Average # of Calls per Rep per Day	OK	Max Queue Ho

Average Queue Hold Time Average Handle Time Total Call Volume



Product Type	Campaign			Grand Total
	Direct Mail	Internet Ad	Newspaper Ad	
Service Level	100.0%	100.0%	50.0%	75.0%
Total Call Volume	10	10	20	40
Total Answered Call Volume	0		10	20
Average Queue Hold Time	43	41	45	43
Average Speed of Answer	3	3	4	3

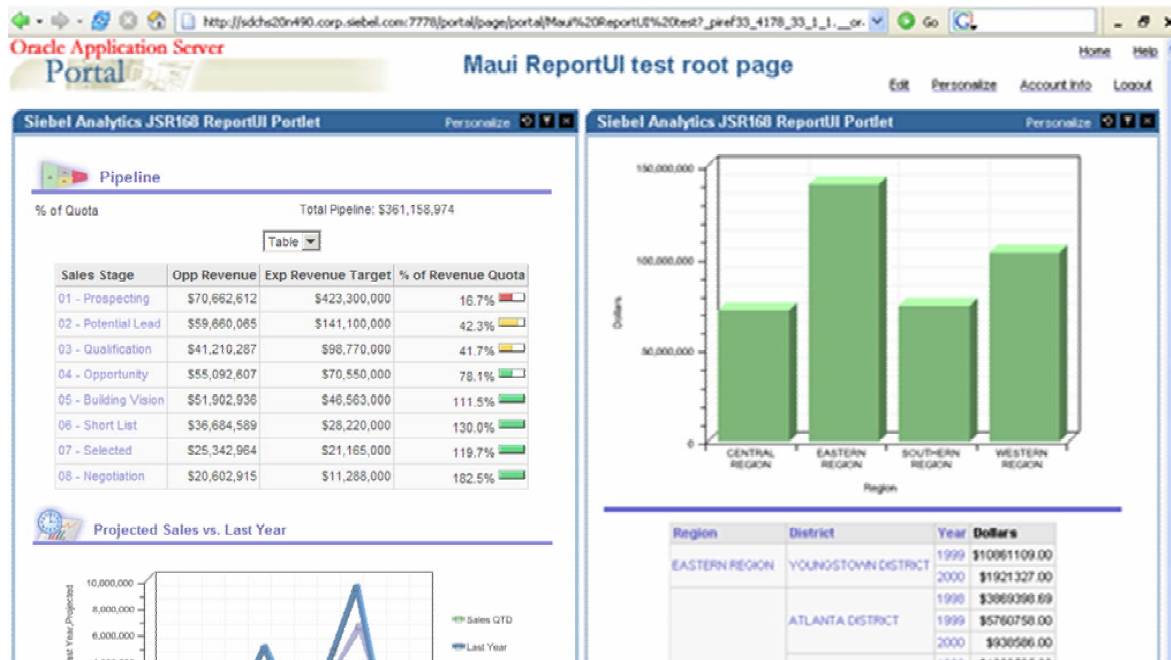
	01/04/04	01/05/04	01/06/04	01/07/04	01/08/04	01/09/04	01/10/04	01/11/04
% Chg Average After Call Work Time	14.2%	14.3%	14.2%	14.2%	13.3%	14.6%	14.3%	20.0%
% Chg Average Handle Time	13.8%	16.7%	14.1%	13.5%	13.2%	17.1%	14.5%	19.1%
% Chg Average Hold Time	13.0%	15.0%	13.7%	11.4%	16.0%	14.7%	12.7%	20.3%
% Chg Average Talk Time	13.7%	17.1%	14.1%	13.4%	13.1%	17.5%	14.6%	19.0%
# of Contact Reps	99	97	95	93	91	91	91	91

Drill to Detail

Flexible Deployment Options

Single Semantic Model with Variety of User Interfaces

- Standalone Dashboards
- Portal integration – via JSR-168/WSRP



Customer Example

Putnam Investments



- Actionable intelligence to 1900+ contact center employees and management
- Brings together information from switch, call center application, customer portfolio and 3rd party satisfaction scores
- Improved workforce performance in contact center
- Improve quality of service to institutional customers



**For more information on CRM
Analytics...**

- ***www.oracle.com/crm***

- ***www.oracle.com/bi***



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