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What's new in Siebel Sales 8.0?



Oracle | Siebel Sales

Agenda

- **Empowering Users**
- **Enabling Responsiveness**
- **Ensuring Value**



Oracle | Siebel Sales

The world's leading SFA solution for maximizing the value of customer relationships.

- **Most Customer Success**
- **Most Innovative CRM Solutions**
- **Most Strategic CRM Partner**

Cross-Industry SFA Success with Unmatched Scale

10,000+
Users

Communications



Manufacturing/HT



Finance/Insurance



Life Sciences



3,000-
10,000
Users



Siebel Enterprise Sales 8.0 Highlights

- **PMP Embedded Sales Methodology**
- **Greater Desktop Integration**
- **Advanced Sales Forecasting**
 - *Product Quantity Forecasting and Rollup – Multi Dimensional Forecasting*
 - *Unit of Measure (UoM) Conversion*
 - *Refresh Forecast Capability*
- **Usability Improvements**
 - *New universal UI Style*
 - *Search & Advanced Query*
 - *Task-based UI*

Portfolio Management Process

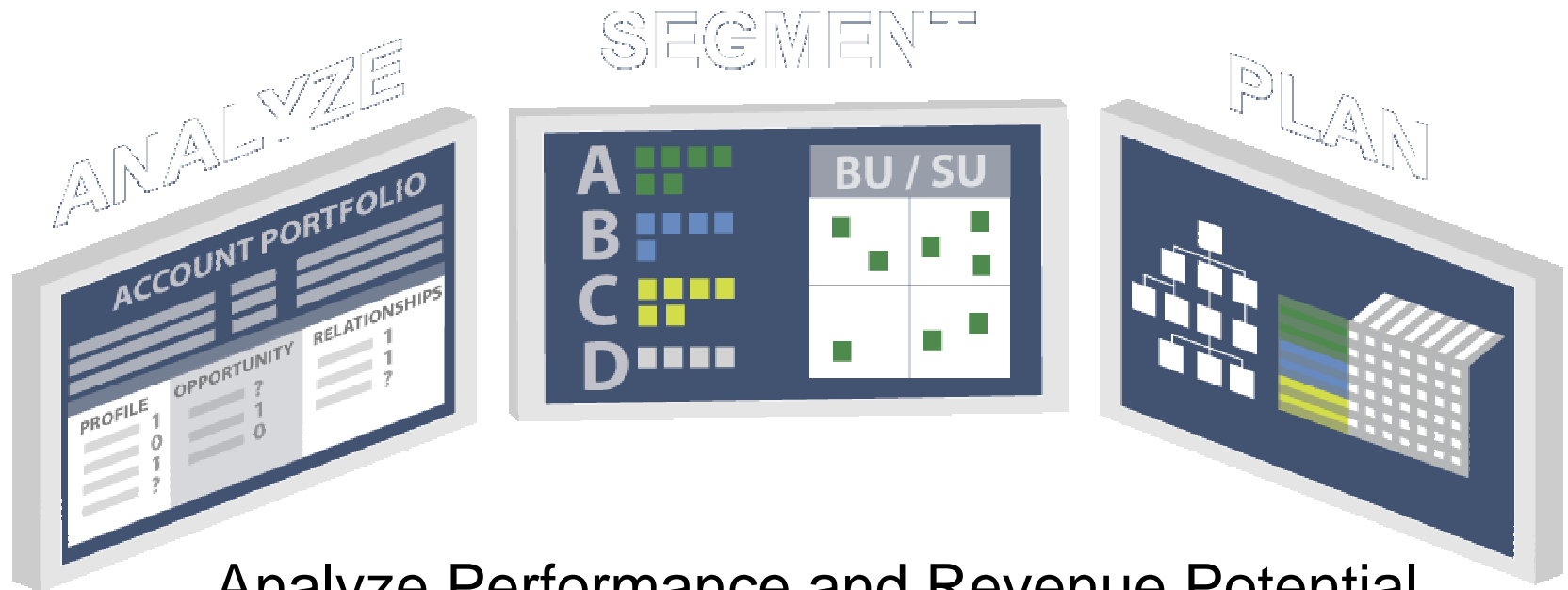


Embedded Sales Methodology

- **Portfolio Management Process (PMP) Sales Methodology**
 - Methodology designed for managing groups of accounts in order to achieve revenue targets, while utilizing and leveraging resources to develop strategic accounts and protect established account relationships against competitors
- **Allows sales reps to:**
 - Assess their portfolios and engage in high potential accounts
 - Perform segmentation to decide how to ration time, planning, and resources between and within the accounts
 - Manage a complex set of ongoing relationships with customers and partners
 - Follow a consistent process when targeting the most profitable accounts
- **Structured Account Sales Methodology that:**
 - Establishes a plan that helps prioritize customer investments and yields in the highest return on revenue

Embedded Sales Methodology

- Portfolio Management Major Components:



Analyze Performance and Revenue Potential

Segment Accounts and Business Units

Plan Focus, Actions and Resource Allocations

Review and Test Plan with Manager and Selling Team

PMP Embedded Sales Methodology

- **Portfolio Management Process – Benefits:**
 - Provides a structured Account Sales Methodology that:
 - Establishes a plan that helps prioritize customer investments and yields in the highest return on revenue
 - Improves collaboration among the members of the “virtual” sales team
 - Enables the appropriate solutions to address account needs and helps identify total, portfolio wide revenue potential

Microsoft Office Integration



Microsoft Office Integration

- **Microsoft Office Integration – MS Excel Reporting**
 - Allows sales users to create custom reports, charts, and spreadsheets using Siebel data directly from within MS Excel
 - Eliminates the need to export .csv files and then import into Excel and reduces the steps necessary to include sales information in charts and reports
 - Supports the following Siebel business entities:
 - Accounts
 - Contacts
 - Opportunities
 - Service Requests



Microsoft Office Integration

- **Microsoft Office Integration with MS Excel – Benefits:**
 - Create and populate Excel spreadsheets using data directly from the Siebel Sales Enterprise
 - Export data real-time to create custom Excel reports and graphs
 - Specify dynamic fields and filtering of data
 - Invoke built-in data refresh capabilities without having to manually perform exports and imports
 - Extended the analysis of Siebel data into pivot tables and charts

Microsoft Office Integration

- **Microsoft Office Integration – MS Word Mail Merge**
 - Allows sales users to create a personalized documents or messages in order to save, print and/or email to a list of recipients, directly from within MS Word
 - Enables direct correspondence using filters and fields from the Siebel Sales Enterprise and tracks activities of messages sent for follow up purposes
 - Supports the following Siebel business entities:
 - Accounts
 - Activities
 - Contacts
 - Opportunities
 - Service Requests

Microsoft Office Integration

- **Microsoft Office Integration with MS Word – Benefits**
 - Create a list of recipients using data from Siebel Sales based on simple and advanced search filtering criteria
 - Compose correspondence and messages with substitution fields directly from the Siebel Sales database
 - Preview documents real-time with merged fields in order to review the document format before it is sent
 - Email and print documents directly from MS Word
 - Capture a record of the messages sent to each contact in Siebel as an activity for further follow up

Advanced Forecasting



Advanced Forecasting

- **Product Quantity Forecasting**

- Allows sales managers to easily view product revenues and quantities grouped by different dimensions such as Product Line or Product
- Provides a great insight into how the total product revenue and quantity are aggregated
- Enables companies that deliver physical product or sell expiring inventory, mostly in Hi-Tech & Manufacturing industry, to understand the future demand for their products at the product level. This will significantly increase the effectiveness of their production and resource planning.

Advanced Forecasting

- **Product Quantity Forecasting – Benefits:**
 - Increase Sale Management Productivity & Effectiveness
 - Eliminates the need of creating multiple forecast series
 - Provides a consistent interface to complete the task
 - Allows for flexible adjustment and rollup
 - Improve Demand Planning
 - Use forecasted product quantities as input into inventory management system

Advanced Forecasting

- **Unit of Measure (UoM) Conversion**

- Enables geographically disparate sales organization who forecast by different UoM to create their forecasts and accurately aggregate product units
- Product quantities will be automatically converted from sales reps' forecasts into sales Manager's based on sales manager's preferred UoM. For example, converting Liter to Gallon when forecasting volume.

Advanced Forecasting

- **Unit of Measure (UoM) Conversion – Benefits:**
 - Increase Sale Effectiveness
 - Enables companies with global business models to seamlessly forecast with different product units
 - Improve Forecast Accuracy and Inventory Planning
 - Provides automatic conversion of product units in a forecast to ensure accurate production planning



Advanced Forecasting

- **Refresh Forecast Capability**
 - Refresh forecast alerts inform managers of any changes in subordinates' forecasts
 - Allows sales managers to selectively pull newly added revenues from subordinates into their forecast

Advanced Forecasting

- **Refresh Forecast Capability – Benefits:**
 - Increase User Adoption – Enhanced Usability
 - Improves user experience by eliminating the unnecessary process of deleting existing revenue forecasts and recreating the same forecast series to accommodate the newly added revenues by subordinates
 - Increase Sales Productivity
 - Takes the burden of not knowing the latest changes in subordinates' revenue by providing Forecast Refresh Alerts directly from the sales manager's forecast screen
 - Allows sales managers to more accurately and reliably complete the revenue adjustment process

Siebel Sales 8.0 Highlights - Summary

- Portfolio Management Process Sales Methodology
- Microsoft Excel Integration for Advanced Reporting
- Microsoft Word for Mail Merge and Correspondence
- Product Quantity and Multi Dimensional Forecasting and Forecasting
- Unit of Measure (UoM) Forecasting Conversion
- Real-time Refresh Forecast Capability

For More Information

www.oracle.com/applications/crm/siebel/sales

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