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

<table>
<thead>
<tr>
<th>Industry</th>
<th>Companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications</td>
<td>ATT, cingular, Deutsche Telekom</td>
</tr>
<tr>
<td>Manufacturing/HT</td>
<td>IBM, Microsoft, GE, HP</td>
</tr>
<tr>
<td>Finance/Insurance</td>
<td>Bank of America, Societe Generale, Northwestern Mutual, Dresdner Bank</td>
</tr>
<tr>
<td>Life Sciences</td>
<td>AstraZeneca, gsk, GlaxoSmithKline, Johnson &amp; Johnson, Pfizer</td>
</tr>
</tbody>
</table>

10,000+ Users

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
Oracle is the Information Company