

# Differentiate Your Company with Complete CRM

*An Oracle White Paper*  
*February 2009*

**ORACLE®**

---

**SIEBEL**  
CUSTOMER RELATIONSHIP  
MANAGEMENT

**NOTE:**

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, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

# Differentiate Your Company With Complete CRM

## INTRODUCTION

Customer Relationship Management (CRM) used to be relatively straightforward. Customer relationships were managed exclusively by the company, its employees, and its partners. However, times have changed. The way customers, partners, and employees interact has changed. And, as a result, CRM needs to change as well.

The spread of Web 2.0 concepts in everyday consumer activities has altered the way people relate to one another and how information is delivered. People want applications that are engaging and that can deliver the answer they need instantaneously. As a result, interactions between customers, partners, and employees are much faster paced. In a highly networked world where people can comment, connect, and express their own opinions and ideas, it's important that CRM solutions understand these new types of relationships that break through traditional organizational boundaries – and that CRM empower you to adapt to these new ways of interacting and doing business.

CRM needs to evolve with this transformation, beyond basic transactional and analytical information, to take advantage of the new way people want to do business. Conversations and communication that used to be managed by the company now happens with a much broader, diverse audience – with a global reach. A new approach is needed to not only adapt to the way organizations and people transact and analyze business but also how they engage in these activities.

This white paper will expand on what Oracle defines as *Complete CRM* – how businesses can better engage customers and users, manage customer transactions, and analyze results to adapt and take advantage of changing business and economic circumstances to realize greater value from CRM.

## THE CHANGING LANDSCAPE OF CRM

Information and branding once was controlled and managed tightly by companies, who had direct control and influence over buyer behavior. But now with Web 2.0, these companies find they no longer “own” customer relationships. The relationship between buyer and seller has changed. Conversations and communications that used to happen over the garden fence or within a local community now happen on a global scale. Customers now have other ways of finding information, and there is the influence of others in the buying decision. Conversations among customers, employees, and partners are happening that

companies are not aware of and have no way managing or synthesizing for better and faster decision making.

It is important to recognize the shift from vendor-centricity to customer- and community-centricity. With the wide availability of third party information sources and peer forums and reviews, consumers rely on a mix of peer and information sources to influence their buying decisions.

The numbers are compelling. While the Internet may account for a small portion (only 10%) of total sales, social media and networks influence a very significant portion (greater than 40%) of all offline sales.<sup>1</sup> An Edelman report survey for 2008 found that 58% percent of respondents rated “a person like themselves” as the most credible spokesperson for a company while only 36% percent rated the CEO.<sup>2</sup>

This swing in influence requires a CRM solution that can capture vital information that occur across channels and systems to fully connect customers, employees, and partners across a company’s sales, marketing, and service organizations. These applications need to:

- Engage customers, employees, and partners in every interaction to encourage maximum use and utility
- Automate, capture, and manage transactions resulting from every useful customer related interaction
- Analyze every transaction and interaction for better and faster insight

Only by successfully blending these characteristics can a company gather better information and richer data to deliver more engaging interactions and act upon the right conclusions to deliver a higher quality customer experience.

### **Engage Customers and Employees at Every Touchpoint**

This is an increasingly networked world where people expect a personalized experience and they expect to be able to find the answers they want quickly. Customers expect companies to demonstrate they know who they are – and organizations that deliver get their business. To accomplish this requires personalized, relevant customer promotions and communications that engender customer loyalty across *all* customer touchpoints and across all aspects of CRM.

Customer loyalty is arguably at the heart of any successful CRM strategy and a key differentiator in a competitive economy. Loyalty is not just about redeeming membership points; it plays a critical role in every customer interaction – at a point of sale, on a call with customer support, or when browsing an e-commerce site – and needs to blend into an organization’s sales, marketing, and service processes. Every customer interaction – no matter how brief – is a chance to engage with customers and promote loyalty to increase up- and cross-sell opportunities.

---

<sup>1</sup> Harvard Business School, Social Media Report, March 2008

<sup>2</sup> Edelman Customer Index Report 2008

**“Social networking is increasing the velocity of trusted information exchange, and in doing so, drives revenue acceleration, organizational efficiency, risk reduction, and constituent satisfaction.”**

**—Rachel Happe, Research Manager,  
Digital Business Economy, IDC**

**“In industry after industry, loyalty leaders are growing at more than twice the rate of their competitors.”**

**—Fred Reichheld , author of “The Ultimate Question”**

Context-aware applications keep employees engaged and productive by capturing vital transactional and customer-related information as an employee works without the need for manual data entry or reporting. The more engaged employees are with tools, the more information that will be captured and delivered through a CRM solution. Such applications exhibit the following characteristics:

- ***Task focused, geared around user productivity.*** Time is precious. CRM users need applications that work the way they do to close deals and service customers, while capturing valuable customer and transactional data as they go about their daily tasks without requiring users to manually enter data. These applications need to be focused, intuitive, and context-aware to ensure vital information is just a click away.
- ***Driven from collective intelligence.*** Each customer touchpoint provides a wealth of information, yet this data is often confined to one employee, or at best, a subset of an organization. Each customer interaction should be analyzed to improve the next interaction, so that both customers and employees can benefit from the collective intelligence of the broader community.
- ***Community aware, collaboration ready.*** An organization's strongest asset is not just its people – it's also the relationships and resulting conversations these people have with customers, partners, and other employees that offer true value to a company. For a complete CRM solution, vital interactions and insight gained from these relationships need to be captured.

#### **Examples of How Oracle Is Delivering Engaging Applications**

In recent years, Oracle has focused on delivering innovation and changing how employees, partners, and customers interact with each other and the everyday applications that permeate their daily lives. Examples of recent additions to the Oracle portfolio include:

- ***Siebel Loyalty Management.*** Fully integrated with core CRM processes – including sales, marketing, service, order management, and analytics – Siebel Loyalty Management improves and personalizes customer experience across channels to more effectively influence and reward desired customer behavior.
- ***Siebel Self-Service Applications.*** Siebel E-Commerce and Siebel E-Support empower customers to help themselves by creating an engaging, personalized channel for customer interaction with relevant, meaningful content for a richer and more fulfilling selling and service experience.
- ***Oracle Social CRM Applications.*** These Web 2.0-based, intuitive applications empower sales users to be more effective as they harness the collective intelligence of the broader community to identify highly-qualified leads, develop and track sales campaigns, and collaborate on sales presentations to close a deal.

Engaging applications need to be user centric, focused on productivity and empowerment, and leverage the natural rhythms people work.

- **Oracle CRM Gadgets.** Designed as mini-desktop applications, Oracle CRM Gadgets focus on delivering quick access to vital and frequently accessed CRM data without the need to log into a full-blown application.
- **Siebel Personalized Content Delivery.** This interactive application combines Siebel Life Sciences CRM capabilities with cross-enterprise analytics to capture vital interactions between a pharmaceutical sales rep and physician. These data points are then analyzed, helping to optimize and personalize content for future interactions.

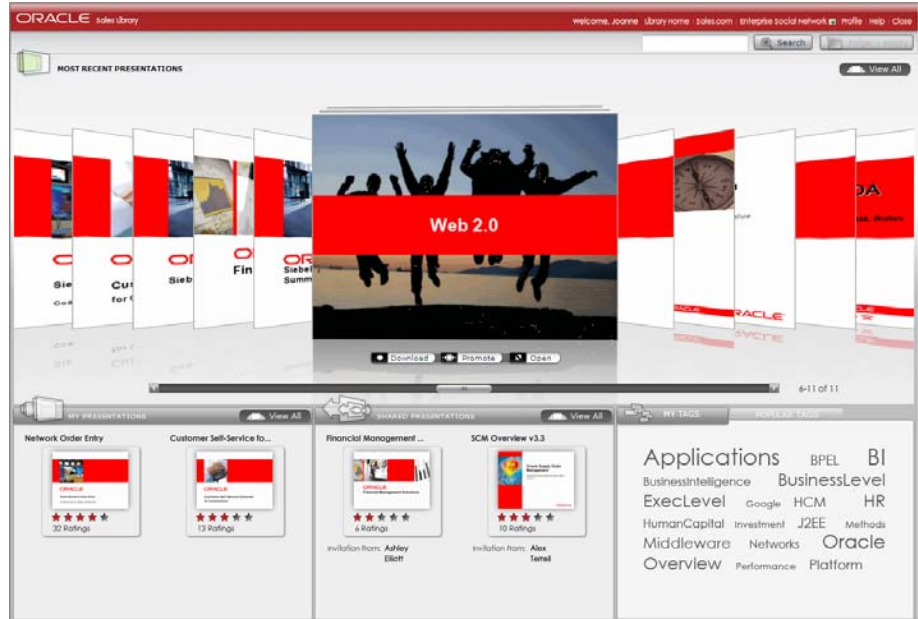


Figure 2: Oracle Social CRM Applications harness an organization's collective intelligence

### Transact Business the Way You Want To Get Results

Requirements in how customer information is captured and managed in everyday CRM transactions have evolved as well. As technology continues to advance, companies need to deal with a vast array of interaction channels, disparate systems and information sources, and additional deployment models. This multitude of complexities and options emphasize the need to have a single, consistent view of the customer as customer information is scattered about the enterprise. Enabling customers and employees to interact and transact through their channel of choice – whether through a call center, over the Internet, in person, via a mobile device, or through the growing realm of communities – while maintaining a channel-independent CRM solution with centralized business logic is vital.

There has been a significant shift from back-office, product-centric processes to front-office, customer centric-processes – and CRM is driving a significant amount of overall business. CRM, which traditionally was used primarily for account, lead,

and opportunity management, is now looked upon as a pivotal point for pricing, promotions, and even order management. With CRM as an entry point in enabling an organization's business strategy, integration becomes key. Oracle Application Integration Architecture, built on Oracle Fusion Middleware, offers prebuilt direct integrations and Process Integration Packs to leading front- and back-office applications – connecting Siebel CRM, Oracle CRM On Demand, Oracle E-Business Suite, JD Edwards Enterprise One as well as other packaged and custom enterprise systems– to realize the full potential of a seamless, virtual application suite.

Finally, companies need the flexibility of choice in how their business is run, whether on demand in a Software-as-a-Service (SaaS) model, on premise with traditional software deployments, privately managed as a vendor-hosted application, or as an integrated mix of on demand and on premise solutions. No matter the economic climate, the potential of true end-to-end integration offers organizations an advantage to transform their business and gain a significant competitive advantage over others that fail to meet the integration challenge.

### Get Smarter with Better Business Intelligence

In a highly competitive market, analytics can foster a significant business advantage. Employees need more information than is typically shown in a simple chart or graph. They need to know why a trend or event has occurred, and more importantly, what they can do to translate that knowledge into new opportunities. By taking business intelligence to a new level – far beyond reporting and basic analytics – enterprises can arm its executives, managers, and individual contributors across sales, marketing, and service organizations with the insight to make better decisions and optimize processes by synthesizing structured and unstructured content across a broad range of information sources and delivering this insight faster and in ways unavailable before.

**“With most products and services being highly commoditized, more and more businesses are competing on analytics. Getting better insight from information based on richer data sets, more complex models, or even making the same decisions as everyone else but before everyone else makes them – this is how most advanced enterprises compete in today's world.”**

**—Boris Evelson, “The Forrester Wave: Enterprise Business Intelligence Platforms, Q3 2008”**



**Figure 2: Insight gleaned from business intelligence can be a key competitive differentiator**

Key benefits of embedded business intelligence in a CRM application include:

- ***Complete analysis of sales, marketing, and service interactions.*** Access to real-time information is important. Combining that knowledge with historical information is invaluable. As an example, executives can view the current pipeline, as well as historical sales trends, to determine if a current pattern reflects a fundamental change in business conditions or is merely a seasonal anomaly.
- ***Role-based insight.*** To be truly effective, business intelligence needs to permeate through every part of a CRM application and be tailored for that particular user role – whether an executive, manager, or individual contributor – and at the point of interaction. Managers, for example, can easily access the intelligence they need on their mobile device to make educated decisions when they are away from the office or between meetings.
- ***Community-driven insight.*** What is truly enlightening for an organization is not the information gleaned from a single data source, but the ability to mine data across enterprise systems and social communities that span the collective intelligence of an organization. Innovative solutions such as Oracle Sales Prospector and Oracle Deal Management analyze past purchase behavior of like customers to pinpoint the most promising prospects and price points to initiate a successful sales conversation.
- ***Real-time offers.*** Organizations can maximize the value of every customer interaction with advanced predictive analytics embedded in e-commerce and self-service applications and make every customer touchpoint an intelligent interaction. Oracle Real-Time Decisions learns from every interaction and provides recommendations on cross- and up-sell opportunities based on customer profile and past and current activities.

## **COMPLETE CRM: DELIVERED ONLY BY ORACLE**

When it comes to delivering enduring customer value, no one is a better partner than Oracle, with its history of providing high value software solutions for more than 30 years. Only Oracle can offer Complete CRM to:

- Fully engage customers and employees with relevant applications geared towards maximizing end user productivity and customer loyalty
- Capture, streamline, and manage transactions across a wide-range of channels, systems, and industries
- Analyze every relevant interaction to arm executives, managers, and individual contributors with the insight they need to maximize profitability and customer loyalty.



Delivered on demand, on premise, or both, Oracle CRM offers companies a variety of solutions to meet their particular business needs and differentiate their organizations.

To learn more, please visit [www.oracle.com/crm](http://www.oracle.com/crm).



Differentiate Your Company With Complete CRM  
February 2009

Oracle Corporation  
World Headquarters  
500 Oracle Parkway  
Redwood Shores, CA 94065  
U.S.A.

Worldwide Inquiries:  
Phone: +1.650.506.7000  
Fax: +1.650.506.7200  
[oracle.com](http://oracle.com)

Copyright © 2009, Oracle and/or its affiliates. All rights reserved.  
This document is provided for information purposes only and the contents hereof are subject to change without notice.  
This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission. Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners. 0408