

Oracle's Siebel CRM Statement of Direction

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Disclaimer

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.

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Purpose

This document provides an overview of features and enhancements included in Oracle's Siebel CRM Innovation Pack 2015 release. It is intended solely to help you assess the business benefits of upgrading to the Innovation Pack 2015 and planning for the implementation and upgrade of the product features described.

Oracle's Siebel CRM CX Strategy

Customers want personal and engaging experiences that develop into relationships. Much like the trials and rewards of personal relationships, when done right, brand relationships can grow into lifetime commitments. When done wrong, they can lead to painful breakups.

Oracle's customer experience solutions help companies and organizations transform their existing operational systems and infrastructure into a differentiated customer experience across the customer lifecycle. Built around Oracle's best-in-class solutions, Oracle delivers the most complete customer experience solution in the industry, enabling companies to differentiate themselves across all channels, touchpoints, and interactions.

Oracle's CX Portfolio Extends Siebel to Deliver Complete CX

Oracle's additions to the CX Portfolio are complementary to Siebel; they augment Siebel with best-of-breed capabilities across all touch points of the customer lifecycle. Siebel is a key component of Oracle's CX product portfolio--with a rich product roadmap focused on Customer Experience, Industry Innovation and Business Agility, Siebel CRM can be your starting point for CX.



Oracle's CRM Solutions

Oracle offers the broadest and deepest portfolio of CRM solutions that address all customer touch-points and provide rich functionality to support the specific business needs to allow organizations of every size to deliver a superior customer experience.

Only Oracle provides Complete CRM:

- » **Innovation** - Industry-recognized leader in CRM
- » **Industry** - More than 20 industry-tailored solutions
- » **Insight** - Embedded real-time business intelligence
- » **Integration** - End-to-end business processes
- » **Infrastructure** - Broadest choice of deployment options

This document highlights some of the key future product capabilities planned for Siebel CRM. This document will be updated periodically to include new features as they are planned.

Oracle's Commitment to Siebel CRM Innovations

Applications Unlimited is Oracle's plan to continue enhancing our current applications product lines, which include Oracle Siebel CRM.

Furthermore, Oracle is committed to investing in continual innovation for Oracle Siebel CRM. Oracle will provide incremental enhancements to Siebel CRM through a series of Siebel CRM Innovation Packs. These Innovation Packs will include functional and product module additions, as well as feature enhancements based on customer feedback.

An underlying benefit of the Oracle Siebel CRM Innovation Packs is that customers on the most recent versions of Oracle Siebel CRM do not need to upgrade to a new major release in order to benefit from added features and functionality. Customers that have upgraded to Oracle Siebel 8.1.1 or point releases, or Oracle Siebel 8.2.2 or point releases, can leverage the Oracle Siebel CRM Innovation Packs. More details on these proposed innovations are included in this Statement of Direction.

Siebel CRM Support Timelines for Releases in Premier Support

The current Siebel CRM support timelines and go-forward strategy is described in the following table:

SIEBEL CRM SUPPORT MATRIX

SIEBEL RELEASE	PREMIER SUPPORT	EXTENDED SUPPORT	SUSTAINING SUPPORT	GO FORWARD STRATEGY
8.1.x	Nov '17	Nov '20	Indefinite	Incremental Innovation
8.2.x	Nov '17	Nov '20	Indefinite	Incremental Innovation

For more information regarding older releases and the support extension for Siebel CRM version 8.1, see [Lifetime Support Policy for Oracle Applications on My Oracle Support](#).

Innovation Pack Themes

The Innovation Pack 2015 is built around core themes that provide a cohesive product experience. The primary themes are described below:

Business Agility

Agile - The Siebel application is now easier than ever to maintain and update. This continued focus enables enterprises to adapt to business challenges quicker than ever and our goal is to continue to reduce application downtime, providing the ability to make changes to the application in real-time. For end users Siebel requires only a browser and credentials. No matter where Siebel is hosted it is secure on any browser, device on the internet or intranet.

Open UI - The Siebel CRM Open UI framework provides the flexibility to design and deploy the application to be specific to your business and customer needs. The ability to deploy the application across a broad variety of browsers and devices on an open and flexible technology stack saves money and reduces the total cost of ownership (TCO). All of these features are securely available over the public internet to end users.


Cloud Ready - Siebel CRM is complementary to Oracle Cloud applications. Siebel allows your business to take a flexible approach to your cloud IT by catering to cloud requirements for a variety of stake holders and business requirements. Siebel CRM provides a variety of cloud capabilities:

- » Siebel can be hosted in public, private or partner clouds for employee, partner and/or customer facing applications. Siebel can also be hosted on premise. This allows for optimization of deployment preferences and protection of most valuable assets, customer data.
- » Siebel on premise or hosted deployments can integrate with Oracle Cloud applications via a number of available integrations:
 - » Siebel interfaces can all be run securely over the internet for Open UI, Siebel Mobile and Siebel EAI interfaces
 - » Siebel provides Sales, Service, Marketing, Loyalty and MDM as an integrated source of truth in the cloud
 - » For sophisticated customers and partners Siebel CRM now supports multitenant database support on the Oracle 12c database.

With Siebel CRM you can confidently take your investment to the next level and host your application in the most suitable cloud deployment model for your enterprise. Siebel CRM can integrate with Oracle Sales Cloud, Service Cloud and other ecosystem cloud products to create complete and memorable customer experiences. Oracle offers cloud hosting options for Siebel CRM today. Other partners also support cloud hosted options.

Customer Experience

Open UI - Our ongoing investment has evolved the UI across all channels with innovations such as the Contact Center and Open UI eService. Open UI maximizes productivity with a simple, clean user interface and an engaging user experience.



Mobile - Siebel Mobile enables your application to be used on any mobile device and to be accessible from anywhere. The application automatically recognizes and adjusts according to the device. Siebel is enabled for the new generation of mobile usage.

Usability - Applications are enhanced for mobile usability and to take advantage of the new responsive Open UI framework. The updated UI design is being driven by mobile device and personas. This creates a better user experience for each employee and for mobile and tablet use.

Social - The pervasive nature of social media and customers' ongoing interactions across this channel illustrate the need for an updated and complete 360° view of your customers. Siebel CRM innovations with Master Data Management represent progressive steps to achieve that golden customer record for your organization.

Industry Innovation

Best of Breed - Siebel CRM's deep industry solutions continue to be extended to leverage the best-of-breed cloud services to the Siebel ecosystem, such as innovations in industry, mobile solutions, and Oracle's CX products. Siebel CRM continues to be the best and most complete, industry CRM solution available.

Open UI - The flexibility of Siebel Open UI allows applications to adopt new integrated cloud solutions easily and to leverage Oracle's CX portfolio.

Business Agility

The new features which enhance Product Life Cycle Management are described below.

Upgrade Enhancements

Enhancements to Upgrade and the Incremental Repository Merge process in this release are as follows:

Siebel Upgrade and Incremental Repository Merge is an integral process for customers to upgrade to the latest Innovation Pack release. The main objective is to provide increased business agility for customers to uptake innovations in Siebel Innovation Pack releases thereby reducing the total cost of ownership for a Siebel deployment.

Key enhancements in this release include:

- » Upgrade paths support to directly upgrade to IP2015 (from existing Siebel versions) including the ability to upgrade from IP2014 to IP2015
- » Inclusion and enhancement of the help content in the Database Server Configuration wizard screens to help customers understand the purpose of each screen seamlessly.

Key enhancements have also been made in this release to simplify deployment, these include:

- » LDAP Client installation is integrated as part of the Siebel Installer.
- » Security, TLS and SHA2 and SHA3 support have been added throughout the application.

Data Quality & Data Governance Management

Data Quality Management is an integral process within any application. Master Data Management (MDM) and Data Governance provides not just Data Quality tools and process management, but seeks to deliver it on behalf of an entire application ecosystem across the integrated enterprise.

Data Quality is measured by its Accuracy, Conformity, Completeness, Duplicates, Consistency, and Integrity definitions. So we plan to introduce more direct control on Data Quality Management capabilities in UCM (Oracle Customer Hub) and we will provide the trending capabilities in this tool related to each matrix.


Our objective is delivering increased business agility. Oracle Enterprise Data Quality Server (EDQ) is the functional Data Quality (DQ) utility from Oracle that performs many of the operations for creating and maintaining Data Quality and also generating results reporting. Therefore, it is critical that we enable access directly to EDQ from UCM application to monitor and modify process. This delivers a true "Single MDM Platform" application.

Key functions to Embedded EDQ Access in UCM (Oracle Customer Hub) include:

- » Increased Business Agility through a single Dedicated Screen(s) in UCM directly to EDQ
- » Faster access & configuration of related DQ rules and processes by rendering EDQ views and functions directly from UCM.

Siebel CRM Composer (Developer Preview)

With this release a developer preview of Siebel CRM Composer is provided. This exciting new product is a graphical web based set of collaboration tools that allow the implementation of your business requirements, not only cloud



based consumption but also a Siebel implementation. Siebel CRM Composer is a new experience designed to achieve a number of goals:

- » Siebel CRM Composer provides the ability to define business requirements visually in a user friendly way, allowing for a more creative and simplified deployment cycle for functional upgrades and providing an optimized user experience.
- » Siebel CRM Composer allows multiple instances of application functionality to be created and these can be edited, tested and placed into production via the web based administrative user interface with no downtime.
- » To control the migration of metadata in the Siebel upgrade process, making it even easier.
- » Obviates the need for proprietary web templates.
- » Provides capabilities to improve performance for high latency web based use scenarios

Siebel CRM Composer is provided as a preview only. Siebel Tools continues to be available and is the recommended solution for all production environments.

Certifications

Oracle places a high focus on customer ability to flexibly integrate Siebel products into the enterprise. This is achieved not only via the support of adopted open standards but also by certifying on the latest platforms. The following certification updates are included in this release:

- » Microsoft Windows Server 2012 Server R2 for Siebel server components
- » Microsoft SQL Server 2012 R2, IBM DB2 LUW v10.5, IBM DB2 for zOS v11 with DB2 Connect 10.5 as Database Server options
- » Oracle Java 8 JRE support: Oracle JRE 1.8 can flexibly support Siebel Java Data Beans and support compiled java version 6,7 and 8 on the server.
- » Oracle Java 8 is also supported for the Open UI Client for latest features and security.

The above information will supplement the existing certifications already outlined in Systems Requirements and Supported Platforms /Certifications for Siebel CRM ([Doc ID 1499842.1](#))

Customer Experience

To deliver an unrivalled customer experience in Siebel CRM to meet the expectations of your business, many new features have been introduced.

Open UI Look & Feel

Siebel Open UI provides a new theme that simplifies the user experience to new levels. This new theme, together with Open UI simplicity allows dynamic styling and branding to create a consistent user experience with other Oracle simplified UI applications.

The latest "Siebel Open UI Deployment Guide" ([Doc ID 1499842.1](#)) contains extensive information about the Open UI functionality that is currently available.

For more release information on Siebel Mobile please refer to "Siebel Mobile Web Client - Statement of Direction - Siebel CRM" ([Doc ID 1663459.1](#)).

Siebel Charts

An intuitive new charting framework is included this release:

- » JQuery charts that can easily be customized in the browser with a nice modern UI appearance
- » Siebel Open UI charting framework is fully client side enabled and can be used on both connected and disconnected clients. Since it runs on the open client platform, no components need to be hosted to support it, lowering TCO and reducing platform dependencies.
- » Ability to create charts powered by the Oracle 12c Database, providing the ability to aggregate complex chart data across millions of rows.

Marketing List Import features on Oracle platforms


Marketing List Import features on Oracle platforms provide up to 140x faster performance and scalability than other platforms. The new List Import feature on Oracle platforms is more scalable than ever, allowing import of greater volumes of Contact records from external sources into Siebel Marketing in a short amount of time. Processing of new contact data imports and data-cleansing times for launch of new campaigns is performed faster and can handle greater volumes than ever.

The new feature is designed for importing new Contacts only from a .csv format file and cannot be used to re-import existing Contacts. The feature can only be used to import Contacts, and cannot be used to import other objects associated with Siebel Marketing, such as Leads or Responses. To facilitate easy import from the UI, this feature is now available from the 'Administration> Marketing Import' screen

Partner Relationship Manager Portal with Open UI

In this release a new Partner Relationship Manager portal has been introduced with Open UI. This will enable users to access the portal in any browser. Also included with this feature:

- » Home page with banners and navigational links which can be configured

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- » The standard Partner Relationship Manager (PRM) Home page has been redesigned
 - » New artifacts such as Partner Programs, Partner Finder, Sales Order, Info Center CX Partner Portal, Quote Screen CX, Product Catalog Screen

Industry Innovation

Specific industry innovations are described below.

Pharma Mobile Disconnected enhancements

Key enhancements to the pharma eDetailing functionality in both connected and disconnected modes are:

- » Expose eDetailing as a separate view in the application to allow a sales rep to launch and then associate a Contact
- » Allowing eDetailing to be launched from multiple entry points - Activity, Contact and Account
- » Ability to associate or add a Contact during the presentation session at any time and record which plan items were attended by which provider
- » Ability to suspend the eDetailing session and add feedback at a later stage
- » Ability to send a list of presented plan items to providers who attended the session via an email as part of content follow-up
- » Ability to create a user specific play list when the messaging plan has too many plan items, so that user can use the play list
- » Create Activity automatically if Contact or Account launched

These enhancements extend the solution and give Sales Representatives a fantastic means to present digital content with their clients and provide complete closed-loop marketing process.

Consumer Goods Mobile - Disconnected Direct Store Delivery Mobility

These features enable Consumer Goods Handheld users to migrate to Siebel Mobile for Retail Execution, available as a fully disconnected process on mobile devices. This solution leverages device capabilities such as camera, signature capture, one touch dial, GPS, etc., into the Retail execution process.

Both features is targeted to be delivered on the Innovation Pack 2015 release. The first set of features is targeted to be released in the base release with the next set of features targeted for release in a forthcoming patch set. Siebel Consumer Goods Mobile application introduces two key aspects to the Sales Process:

Direct Store Delivery

Siebel Consumer Goods Mobile application will be enhanced with the following features:

- » New Home Page View with drag and drop of Accounts onto the Calendar.
- » Call and End Call logic.
- » Cycle Counts and Inventory Functionality.
- » Additional Account Views for Assets, Agreements, Invoices, Credit Memos, Merchandising Locations and returns.
- » Bank Deposit and Deposit History Views.

Disconnected support for Retail Execution mobility

In a patch set release subsequent to Innovation Pack 2015, the Siebel Consumer Goods Mobile application provides mobile disconnected support for Retail including Merchandising and Direct Store Delivery the following additional features:

- » Introduce Billing and Invoice functionality.
- » Enhance Order and return Order functionality.

Communications - Product Promotions Process Simplification for CX

Communication service providers (CSPs) use bundle promotion to model convergent bundling that they offer to subscribers. Customers bundle core services offered for a residential customer of phone, broadband along with TV services (entertainment).

Service providers offering wireless service can also bundle them. New services like home security or insurance can also be included in bundling to increase the wallet share and average revenue.

Key features include:

- » In-memory Promotion Upgrade
- » Bundle promotion hierarchy

In-memory promotion migration

Convergent bundling is common requirement for communication service providers. Allowing subscribers to change bundling (upgrade or downgrade) is also a frequently used scenario.

In-memory promotion migration streamlines the user interface and is designed to provide deterministic response time by performing in-memory computation.

Hierarchy for bundle promotion

Hierarchy for bundle promotion displays bundle promotion and its components in a tree hierarchy to provide CSR clear visual representation of assets, quote and order line items.

Public Sector – Responsive Web Design Portal enhancements

Siebel Partner Portal for Public Sector has been enhanced to provide a world-class service portal for government partners with offerings that include the following:

- » Streamlined user experience for service providers
- » New UI renderer to align with Responsive application behavior

This enhanced service partner experience offers:

- » Managing referral orders more efficiently in a streamlined approach
- » Reviewing service provider's assets, agreements.
- » Managing provider profiles



Clinical - Training Planning and Tracking

Clinical Trials involve many site professionals who may be spread across diverse geographical locations and need to be trained and certified on the clinical trial requisites. This is an important aspect of Risk Based Monitoring that helps companies reduce monitoring costs and expedite the entire process of clinical trials.

It is the responsibility of the sponsors, Clinical Research Organizations (CRO) and pharmaceutical companies who are conducting the clinical trials to ensure their site professionals involved are well trained on the ethical, regulatory and process related (SOPs, WIs) aspects of the trial. It is also a requirement that companies track the training plans to closure and maintain records for auditing purposes.

Ensuring a thorough training plan can be defined and rolled out is an important part of the entire clinical trial planning process. The Siebel Clinical Trial Management System (CTMS) will introduce a Training Planning and Tracking feature.

It is also important for organizations to assess and categorize all the risks that involved in the study at different levels; this feature will help develop the appropriate mitigation strategy at an early stage.

Feature details:

Site Training Planning and Tracking

- » Defining training topics and training plans along with versions
- » Publishing training plans to sites and site contacts based on rules
- » Add/delete training plans and training topics at the site level
- » Tracking completion of training topics for the site contacts
- » Tracking training completion status at site, region and protocol levels
- » Web Service to sync training data with external systems

Risk Assessment and Categorization Template (RACT)

- » Create RACT templates for clinical programs, protocols, regions and sites
- » Apply RACT templates at programs, protocols, regions and sites levels to calculate risk at each level



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Hardware and Software, Engineered to Work Together

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