ORACLE DATA SHEET

Oracle Sales

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E-BUSINESS SUITE

Oracle® Sales is an integrated application that provides field sales representatives, sales managers, and sales executives with the tools they need to optimize selling effectiveness. Oracle Sales enables coordinated selling across all sales channels, whether selling directly, with partners, over the phone, or via the web. By automating the entire sales cycle, Oracle Sales enables sales organizations to increase sales, lower sales costs and enhance long-term profitable customer relationships. The capabilities delivered by Oracle Sales ensure that sales people have the information and tools they need to be successful. The Oracle Sales architecture enables easy global deployment and delivers real-time information to users around the world effectively and reliably. Oracle Sales is part of the Oracle E-Business Suite, an integrated set of applications that are engineered to work together.

KEY FEATURES

- Account planning and sales coaching
- Customer and contact management
- B2B and B2C selling
- Lead management
- Opportunity management
- Forecast management
- Personal productivity with customized profiles

KEY BUSINESS BENEFITS

- Sales dashboards providing summary and detailed views of sales information
- Account planning and sales coaching tools
- Effective lead and contact management
- Opportunity and pipeline management
- Flexible forecasting
- Seamless integration with Oracle E-Business Suite applications
- Low cost of ownership

Enable More Efficient, More Effective Selling

The Sales Dashboard

Oracle Sales supports a highly configurable Dashboard that displays various bins, reports, and a Sales Funnel. These exhibit essential sales data: top customers; open leads and opportunities; current appointments and tasks; latest forecasts; shortcuts to other Oracle Applications. The Sales Funnel gives sales representatives a visual summary of the opportunities in their pipeline for each stage of the sales cycle. The Oracle Sales Dashboard therefore provides sales professionals with instant one-stop access to pertinent information and tools needed to carry out their day-to-day tasks.

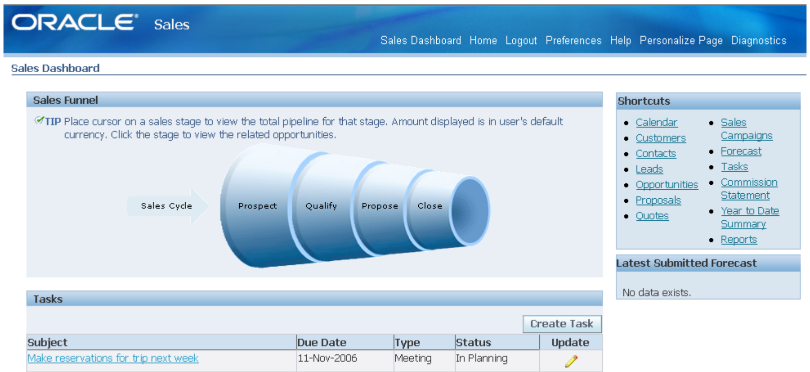

Figure 1: The Sales Dashboard – One stop access to pertinent information and tools

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Oracle iStore’s powerful and scalable e-commerce system easily lets you create, track and evolve B2B and B2C e-commerce sites for different customers, locations, languages and more while reducing order-to-fulfillment costs. Cross-sell and up-sell capabilities use unified, enterprise-wide customer data to personalize customer experience and maximize per-customer purchase. Self-service order tracking and returns improve customer satisfaction while driving down customer service costs. And because it is a component of Oracle’s E-Business suite, iStore integrates e-commerce with related enterprise business processes such as campaign planning and execution, order to cash, call to resolution.

Such a level of integration allows you to effectively deploy and execute a multi-channel strategy, where product information, pricing, availability information, order inquiries, etc. are consistent across any customer touch point, including the online channel.

Complete View Of Customers

Oracle Sales offers sales professionals with complete customer overviews at each stage of the sales process. Before contacting customers, salespeople can review customer information including products installed, key contacts, open opportunities, quotes and orders, proposals sent, and specific sales team members assigned to customer accounts. This comprehensive information allows sales people to better manage their customer accounts and to plan each customer interaction more efficiently. With Oracle Sales, salespeople can offer the right product to the right customer, identify cross-sell and up-sell opportunities, and expand their installed base.

Account Planning Process

For many organizations, incremental sales to existing customers represent a large portion of the organization’s revenue. Because of this, organizations need tools to help their Account Managers grow the install base within these accounts and to also maintain and bolster the overall customer relationship. A comprehensive Account Planning capability provides Account Managers with tools for managing large accounts, developing long-term strategies, and maintaining long-term relationships. The Account Planning process consists of the following key components:

- Relationship Scorecards – the ability to create scorecards to assess the health of the customer relationship.
- SWOT Analysis – the guide to analyzing the Strengths, Weaknesses, Opportunities and Threats that are present in each account.
- Business Drivers – provides tracking and understanding the factors that drive success or failure within an account.
- Selling Plan – enables Account Managers to plan both strategic and revenue objectives for an account. Progress against revenue objectives are automatically calculated and scored as deals are closed.
- Account Plan Collaboration – allows Account Managers to quickly and easily create detailed account plan worksheets to share with internal team members or

high level strategic worksheets to share with key allies within the account.

Oracle Sales provides full flexibility for Organizations to create personalized account planning methodologies. Organizations are free to implement either homegrown account plan content, or content from well known, industry recognized vendors – all with out of the box functionality.

Integrated Calendar

Oracle Sales provides an integrated calendar for sales professionals to easily manage their daily activities. Since the entire organization works with a common calendar, users can work as a team thereby improving productivity. Synchronization of critical business and personal data such as tasks, appointments and selected business contacts between the Oracle Applications and Microsoft Outlook is supported by the system. A common companywide calendar to keep track of all their tasks and appointments helps the sales people to effectively prepare a work action plan and in turn concentrate their efforts on their primary job - selling to the customer.

Contact Management

Sales people need to contact a number of customers and contacts to evangelize the products and services of the company. Oracle Sales stores name, job title, email, telephone, address, and department information for these contacts, and tracks interactions, whether it is creating callbacks, follow-up activities, or notes. When entering new contacts, data quality functionality searches for similar existing contacts to help prevent duplicates being created.

Designed to Fit the Way You Sell

Flexible Sales Methodologies

With global and virtual sales teams, sales executives have an added challenge to drive proven sales methodologies throughout their sales organization. Tried and trusted sales methodologies can streamline the sales process, provide uniform approaches to opportunity management, improve close rates by enforcing winning strategies, and ensure capture of appropriate information to allow effective win / loss analysis. Oracle Sales offers sales executives the ability to plan strategies and apply these strategies to their sales force.

A sales methodology consists of a predefined set of sales stages, each with multiple steps. An online 'Sales Coach' guides the sales professionals through each stage, ensuring that standards are followed. Throughout the process, the sales professional can capture competitor information, and track customer decision factors. Management can utilize this information to determine the strengths and weaknesses of the business, and enhance the ability of sales professionals to sell effectively in similar competitive situations, thus making the sales process more successful, and improving the organization's ability to win deals.

Sales Forecasting

With Oracle Sales, sales organizations have flexibility in managing their forecast. Sales organizations can analyze their forecast data at geographic, opportunity, and product levels, thereby enabling management teams to judge the overall health of their organization. Through seamless integration with Opportunity Management, opportunity forecasts can be maintained within the opportunity itself. This provides instant visibility to management without the need for users to separately submit forecasts thereby reducing the time spent by users on preparing their forecast. Product family forecasts may be provided to management dependent on, or independent of, the opportunity pipeline. Multi-currency support within the Forecast module provides sales managers and executives that manage groups across the world a global view of the forecast in their local currency. Thus Oracle Sales provides sales organizations a mechanism to monitor and judge the overall quality of the actual and expected pipeline.

Product Level Forecasting

In some sales situations, there can be multiple sales reps working on the same deal where each sales rep has a different product expertise. Although the reps are working together towards the common goal of closing the deal, the reps may “own” the portion of the deal pertaining to their product specialty area – including forecast information. In order to accommodate this type of selling scenario, Oracle Sales provides the ability for a different sales rep to “own” and forecast each product line of an opportunity. The product forecast information rolls up to the manager of the sales rep who owns the product line. This provides collaboration capability between reps working on the same deal but at the same time allows each rep to separately forecast for their product area.

Multiple Hierarchy Forecasting

In addition to the opportunity or product owner providing forecast information, Oracle Sales also supports the ability for multiple sales team members to also provide forecast information that roll up to different management chains – with no double counting. This enables all areas of the sales organization to gain visibility to important sales forecast information.

Integrated Territory Management

Oracle Sales takes advantage of the integrated Territory Management module in Oracle Sales Foundation. This module lets users define sales territories based on customer attributes such as geography, industry, market segment, purchase items, channel or account size. The territory structure can be shared not only by all Oracle Sales applications but also by all other Oracle E-Business Suite applications, enabling a consistent, cohesive view of customers across applications. To reduce the effort needed to administer territories, the system allows assignment of sales professionals to customers, leads, and opportunities. Thus the tools provided by Territory Management help sales organizations to model and sell within their territories in a flexible manner.

Effective Lead Management

Effective sales efforts require management and tracking of leads to facilitate the efficient flow of leads through an organization. Oracle Sales provides a solution to convert prospects into predictable sales leads across the enterprise. The central Leads Management Engine automates, manages, and tracks the generation of leads, evaluates and distributes leads in real time using flexible, rule-based business logic, and manages and tracks lead follow up across Oracle Marketing. The Leads Management Engine encapsulates lead qualification, prioritization, and distribution logic using business-specific rules appropriate to different campaign strategies, regions, products, and customers for each stage of the lead lifecycle. The flexibility of the leads engine helps design rules that fit the entire lead life cycle, enabling optimization of lead quality and predictability, and lead coverage.

Streamlined Opportunity Management and Tracking

Oracle Sales centralizes the creation, maintenance, and tracking of opportunities, therefore streamlining the completion of sales efforts. Opportunities can be entered directly, or by conversion of qualified leads. Appropriate sales professionals are assigned to opportunities manually, automatically via Territory Manager rules, or by default. As an opportunity progresses, its details, the probably of a win, and the status of the opportunity can be easily accessed and updated. Opportunity closure information can be captured to assist in win / loss analysis. In collaborative selling situations, it can become difficult to track who is changing information related to a deal. Oracle Sales provides opportunity audit tracking as a way for team members to communicate the important changes that are being made as a deal progresses. For key opportunity information, users can see when changes were made and by who. Providing this information allows sales team members to always stay up to date on what is happening with their deals.

True Team Selling

To manage and close deals successfully, sales teams often cross group boundaries, territories and channels. Oracle Sales works seamlessly with Oracle TeleSales (OTS) and Oracle iStore to create a virtual sales team that enables the sharing of leads, opportunities, quotes, contacts, notes, tasks, and other pertinent customer information between sales team members and customers. Leads and opportunities can be automatically or manually assigned to sales agents. Field sales people can access valuable information about their accounts as they prepare for onsite meetings. Oracle's sales automation modules complement each other and provide the perfect solution for team selling in a dynamic selling environment. Oracle's security component is not only flexible enough to handle this level of complexity but robust to allow for no risk of account or customer information breaches.

Multilanguage, Multicurrency and Multi-Organization Support

Oracle Sales provides support for international sales teams who handle deals involving several currencies and languages. Users can create and view their opportunities, forecasts, and reports in the transaction currency (such as the ECU for euro support). Oracle Sales offers the ability to access customer and contact business activities created in different operating units without requiring the user to switch responsibilities –

specifically Quotes and Orders. Sales users can be setup to access multiple operating units independent of their responsibility. A sales user is able to view quote and order details for all operating units that they can access regardless of responsibility.

Partner Integration

In multi-channel selling environments, channel managers and sales reps need the ability to assign partners to deals and track which sales are generated and closed via the Partner sales channel. Oracle Partners integration allows rule based automatic assignment of deals to partners, as well as manual assignment capability for channel managers and sales reps. In addition, partners have the ability to register deals in cases where the partner has a potential lead or opportunity that the partner can't fulfill directly or for non-competition purposes. Channel managers and sales reps are able to view the referral source for these registered deals from within the Sales application. Partners are also able to drill into an opportunity and view details via a user interface that can be quickly and easily personalized for the partner channel.

Personal Profiles For Increased Productivity

In order to provide the most user friendly experience for sales reps, Oracle Sales allows users to set up personal profiles that will tailor the application to their needs. This flexibility, in addition to the already existing personalization capabilities, allows Oracle Sales to provide users with a custom view – using out of the box capability. Sales users can customize any of their web pages to include the content and specify the layout of that content through an easy to use front end editor.

Leverage The Power Of Oracle E-Business Suite

Through seamless integration with the Oracle E-Business Suite, Oracle Sales provides sales professionals with capabilities far exceeding those of traditional point-solution sales automation tools.

Out Of The Box Integration

Oracle Sales leverages other Oracle E-Business Suite Applications to provide the most expansive sales solution available today. Integration with other Oracle Applications include:

- Oracle Telesales
- Oracle Marketing
- Oracle Quoting
- Oracle Proposals
- Oracle iStore
- Oracle Configurator
- Oracle Sales DBI
- Oracle Inventory
- Oracle Order Mgmt
- Oracle Projects

Campaign To Cash Flow

Oracle Marketing creates and executes campaigns, assigns call guides from Oracle Scripting, and targets the execution of the campaigns across all channels: call centers, web, and direct. These campaigns are executed using various different applications in

RELATED PRODUCTS

The following products are available from Oracle:

- Oracle Telesales
- Oracle Proposals

- Oracle Sales Offline
- Oracle Sales for Handhelds
- Oracle Marketing
- Oracle Incentive Management

RELATED SERVICES

The following services support Oracle Sales:

- Oracle Application Solution Centers
- Oracle University
- Oracle Consulting

the Oracle E-Business Suite. Leads are generated based upon customer interaction and routed based on territories. Sales people can access these Leads directly in Oracle Sales. Leads are then qualified and ranked. Leads can also be generated through sales campaigns created in Oracle Sales. By constructing natural language queries, Sales Managers can mine the installed base, identifying the most appropriate target customers for cross-sell and up-sell sales campaigns. Qualified leads are converted into opportunities, and budgetary and sales information updated. Quotes are created directly from opportunities using Oracle Quoting. From Oracle Quoting, salespeople can either publish quotes to Oracle iStore online stores for customer review or book orders directly, triggering back-end applications for shipping, inventory management, and payment. When the quote is published, customers can enter the store, view its details, modify payment information, and place orders. Throughout the sales process, Oracle Sales maintains campaign information tied to the sale and links this information back to Oracle Marketing for ROI analysis.

Oracle E-Business Suite -- The Complete Solution

Oracle E-Business Suite enables companies to efficiently manage customer processes, manufacture products, ship orders, collect payments, and more—all from applications that are built on unified information architecture. This information architecture provides a single definition of your customers, suppliers, employees, products—all aspects of your business. Whether you implement one module or the entire Suite, Oracle E-Business Suite enables you to share unified information across the enterprise so you can make smarter decisions with better information.

CONTACT US

For more information about Oracle iStore, visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.

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Hardware and Software, Engineered to Work Together

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