

Reinventing the Customer Experience in the Era of the Connected Consumer

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FOREWORD

Staying relevant in today's Retail and Consumer Goods sectors is no easy task given a multitude of both clear and underlying forces now continuously shaping a new world of commerce at the speed of thought, coupled with its ever more connected consumer. To address this era and epochal shift, Oracle and Euromonitor International have partnered in identifying and exploring nine key drivers along the customer journey.

The forces underlying these drivers, by the very nature and speed of their development, have left some companies untethered and struggling. In particular, new technologies are creating massive upheavals in how business is conducted and what experiences consumers now expect brands to provide. Alongside this, today's connected shoppers now enjoy unprecedented and ever increasing access to product information, purchasing power, and delivery convenience. As a result, and not incidentally, these same consumers are also becoming more impatient, demanding, and discerning than previous generations.

We hope this white paper challenges you to think "outside the box" and, perhaps, more daringly as you look beyond merely surviving to a period of thriving. In three successive installments, we will build upon this discussion by considering updated processes necessary for improved Value Chain Collaboration, a discourse on The Path to Digital Relevancy and, most critically, how industry might better stay ahead of the curve through new theories on Technological Ideation and Innovation.

Watch for us then, and let us know as well what you are thinking and doing.

Thanks for reading!

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In recent years, customer experience has become a hot topic as retailers and manufacturers realize that expectations are changing—causing traditional brand and marketing strategies to lose effect. Suggested solutions are often tactical and ignore underlying causes. To provide a deeper analysis, we combine Oracle’s understanding of technology with Euromonitor International’s consumer expertise. We’ll explain the true drivers behind changing customer expectations and provide a simple framework that companies can use to develop an improved customer experience.

INTRODUCTION

Retailers and consumer goods companies face greater pressure from ecommerce, smaller competitors, and tech-based disruptors than ever before. A look at the brand and retail landscape clearly shows the turmoil as customer expectations evolve, new channels expand, and new ways of connecting with customers emerge.

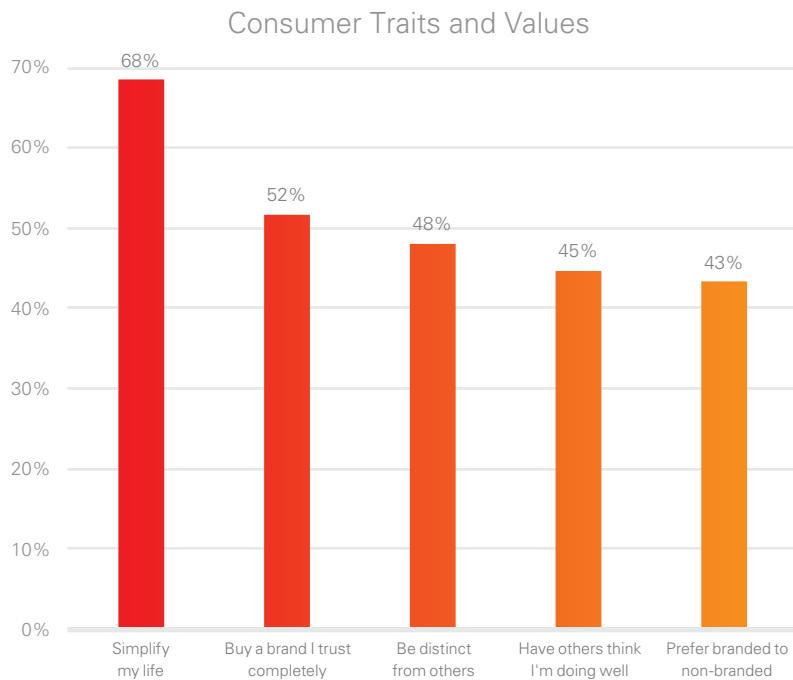
- Shoppers are spending less on disposable products and more on experiences such as dining out and vacations—contributing to a projected decline in US malls from 1,200 to less than 900 over the next decade¹.
- Online retailing is expected to be the fastest-growing channel in the world through 2022².
- Mobile commerce is growing even faster. It's likely to reach a tipping point, accounting for 50 percent of global online retail sales in 2019².
- Brand value is being redefined as the gap between products that reflect the brand and those that are brand-agnostic continues to widen³.
- Of the more than 30,000 new customer products launched each year, 80 percent will disappoint customers and disappear⁴.

The world is changing fast and companies are struggling to keep up.

From Marketing Products to Delivering Experiences

Over the past century, retailers built ever-bigger stores and consumer goods companies developed ever-broader product selections in an attempt to offer merchandise that appeals to every shopper. As selection and space continued to expand, the expertise and availability of in-store staff was stretched too thin, and shopping transformed from a highly personal experience into an isolated, self-service transaction. The pendulum is always swinging, though, and today's customers are increasingly basing buying decisions off the associated experience as much as the actual product. What we're seeing is a sea of change in how brands and retailers have operated for more than a century. That means businesses must transform their customer interactions to survive.

Traditional consumer goods companies attract customers by focusing on brands and status. However, this approach has lost efficacy in recent years as customers shift focus to personal values and experiences.



Source: Euromonitor 2017 Global Consumer Trends survey, covering 28,487 respondents across 21 countries. Responses for agree or strongly agree⁵.

It's clear that retailers and consumer goods companies need to change to stay relevant, and Oracle is here to help. This paper explains why the customer experience is being reshaped, how companies can tackle it, and where technology plays a role. It's challenging to create an experience that truly fulfills the varied demands of customer expectations, but companies that succeed will improve their bottom line and be well positioned for the future.



Enhancing the Customer Experience Directly Translates Into Better Revenues and Profits

A better customer experience, as measured through improved Net Promoter Scores (NPS) and other metrics translates directly into an improved bottom line.

- A London School of Economics study shows that an average NPS increase of 7 percent correlates on average with a 1 percent growth in revenue⁶.
- An HBR study discovered that customers who had excellent past experiences spent 140 percent more compared to those who had poor past experiences⁷.
- Global consulting firm McKinsey states that brands that are able to improve the customer journey can see revenues increase as much as 10 to 15 percent while lowering costs by 15 to 20 percent⁸.

CHANGING EXPECTATIONS ALONG THE ENTIRE CUSTOMER JOURNEY

There are three key stages in the purchase journey—before, during, and after—with customers having specific needs at each stage. Traditional retailers typically focus on the transaction, thus limiting their influence to the second stage. Here, we will examine each stage and see how the latest customer expectations create new challenges for retailers and manufacturers.



Before Purchase

The before-purchase stage of the customer journey encapsulates all of the interactions that take place between customer and brand prior to the purchase of a product. Companies must drive engagement using creative brand experiences and remove pain points on the way to the transactional stage.

- **Customers buy the history of a product:** Many customers are now interested in product provenance or the authenticity and history of the product, and the heritage of the brand. This is part of what transforms a product into an experience, and helps to allay ethical concerns.
- **Customers look for a connection with the product:** Many customers now want to feel connected to the creation process more deeply. They need to understand the design and production process to see how a product aligns with their personal values and fits within their lifestyle.
- **Customers relate to brands that share their values:** Customers increasingly look for shared principles, so brands must celebrate shared lifestyles, interests, principles, and values to create a powerful, emotional connection between customer and product.

“There are few things more important than good old-fashioned, one-on-one, “How can I help you today?” customer service, and people will notice it if you skimp. Many big-box stores are the worst culprits. Finding someone who can help you can be difficult. And even if you do, that person may know little about the store’s products and services.”

— Richard Branson, Virgin Group



During Purchase

The during-purchase stage of the customer journey includes both online and offline purchases. Companies need to deliver immersive experiences tailored to each individual customer, and offer seamless, painless payment options.

- **Customers want experiential interactions:** Because customers are purchasing experiences and lifestyles as much as products, it's vital that they can interact with products to understand how each item supports their lifestyle.
- **Customers need personalization:** Time-starved customers with short attention spans require products that closely meet their needs and improve their lives to make shopping worth their time. This means personalized advice, custom products, and entertaining experiences.
- **Customers need curated options:** Most customers now do their own research, but sales staff can add enormous value. The choices available to customers today can be bewildering, so effective curation of options provides a valuable service.

After Purchase

The after-purchase stage of the customer journey covers all post-purchase, customer-brand interactions. Companies must invest in brand communities and find ways to craft lifelong relationships with their customers.

- **Customers need support and advice:** Customer service is where trust in a brand can be reinforced or lost completely. Excellent service reassures customers, while poor service repels forever—and they will likely tell their friends.
- **Customers appreciate value-adds:** Proactive services reinforce the value of your brand. Help with maximizing product benefits, incentives for future purchases, strong user communities, and complementary product or service suggestions provide real value-add.

- **Customers like to be advocates:** Customers can be powerful advocates with friends, family, and colleagues. Communications should incentivize them to share opinions and experiences through reviews and social media sharing.

With these expectations firmly in mind, we begin to uncover realizable opportunities. In the next section, we explore how to transform customer experience by reframing products and connecting with customers.

GO OUTSIDE IN FOR A BETTER CUSTOMER EXPERIENCE

The industry is full of commentary on the many varied experiences that may satisfy customers' unique expectations. The one-size-fits-all implication of such a list of experiences doesn't address the complexity of the expectations involved. Our approach instead is to break down both the vision and execution of your business, challenge every underlying assumption, and use the following outside-in questions to spark innovation and avoid business-as-usual behavior.

- What are the core needs of your customers?
- How could you better support those needs given all of the tools and technologies available?
- If you were to build your business from scratch today, how would you do it?

Examples of Outside-In Thinking

Dollar Shave Club doesn't make a better razor or create a closer shave. They meet the customer need of knowing when blades need to be changed and provide an easy way to do so.

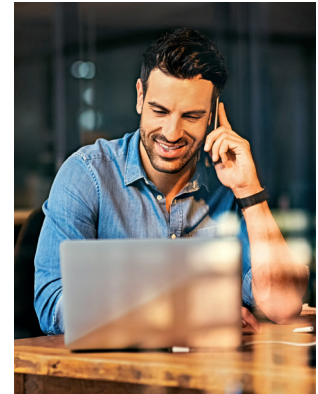
Uber doesn't provide a faster or more comfortable ride. They meet the customer need of getting a car where and when you want it.

Warby Parker doesn't reinvent glasses. They cut out the middleman and connect customers directly with the manufacturer, significantly reducing costs.

Meal box companies are not any better than going to a restaurant. They meet the customer needs of speed, convenience, and eating healthy.

Stitch Fix doesn't offer better clothes than other retailers. They meet the customer need of not having to shop or keep up with fashion trends and styles by providing a personalized wardrobe.

We understand that customers have complex, interrelated needs that go beyond finding the right product at the right price. Applying outside-in thinking allows us to view the world from the perspective of the customer, driving past organizational complexities to identify key, achievable opportunities.



“We take most of the money that we could have spent on paid advertising and instead put it back into the customer experience. Then we let the customers be our marketing.”

—Tony Hsieh, Zappos

REFRAME THE PRODUCT

Whether you're a manufacturer or retailer, everything starts with the product. However, this view is too restrictive when evaluating for customer experience. As you instill the concept of outside-in thinking throughout the company, substitute the word product with service or experience when innovating to improve interactions with customers. This will help you think about telling stories, forming bonds, and building trust instead of features and specifications.

Educate and Build Trust by Telling a Story

- Explain the purpose behind the product, its design, and its sustainability.
- Display transparency on raw materials/ingredients and manufacturing process.
- Provide proof of the special attention you give to ethical and supply chain concerns.
- Use interactive media and videos to give customers a glimpse behind the scenes.
- Provide opportunities for customers to learn from and interact directly with designers.

Appeal to and Enhance the Customer's Lifestyle

- Demonstrate how the product will benefit and/or enhance your customers' lives.
- Speak not just to the person your customer is, but to the person they want to be.
- Appeal to emotions and highlight successful use cases that inspire your target audience.
- Build a community and social media presence around the product.

Go Custom to Form a Deeper Product Connection

- Establish the most likely use cases and customer personas for your product. What kind of person uses it, what is their lifestyle, and how does this brand or product fit into it?
- Offer customization of content and configuration to appeal to different use cases and personas.
- Make customization intuitive while providing useful guidance and recommendations.
- Use technology to facilitate design and tracking for each customer's product.

42%

of global connected consumers aged 15-44 prefer to spend their money on experiences rather than things.

43%

of global connected consumers aged 15-44 buy in-store because they want to see or try before buying, vs. 52% of those aged 45-59 and 61% of those aged 60+.

Source: Euromonitor 2017 Global Consumer Trends survey, covering 28,487 respondents across 21 countries. Experiences responses for agree or strongly agree⁹. In-store responses for respondents' selected reasons¹⁰.

Microbrew Pubs and Craft Beer (USA and Europe)

Craft beer brewing has enjoyed a renaissance over the past decade. As customers looking for an authentic beer experience dove into the creation process, brewers obliged by highlighting their raw materials, equipment, and creativity in brewery tours. As they sought further differentiation, the focus on creative authenticity only intensified: Neighborhood brew pubs, fresh beer with limited shelf lives, and themes like brewing with botanicals instead of hops are all concepts designed to reflect and augment beer drinkers' lifestyles.

La Picantería (Peru)

What sets La Picantería apart is its distinct lack of menu, as customers simply describe what they would like to eat to the chef, and negotiate a compromise given what is possible and available based on the day's ingredients. La Picantería offers an extreme form of customization, as the concept allows diners to have as much control over the menu as possible to maximize appeal.



“Get closer than ever to your customers. So close, in fact, that you tell them what they need well before they realize it themselves.”

— Steve Jobs, Apple

CONNECT WITH THE CUSTOMER

So far, we’ve explored how you can enhance the customer experience by providing education on the product, offering customization opportunities, and building trust. That’s only half of the solution. Now, let’s look at ways to invest directly in the customer experience itself.

Create a Truly Personal Experience

- Use data and analytics to understand exactly who your customers are and what they need to make a purchase decision (product transparency, use case, lifestyle experience, etc.)
- Ask the right questions so that you can precisely tailor products, services, and interactions.
- Offer targeted product levels that vary with needs, budget, and perception of value.
- Customize branding and marketing for price points and experience, from no frills to luxury.
- Understand enough of customer needs to make smart, curated recommendations.

Train Staff as Experts in Both Products and Relationships

- Train staff to ask questions that help identify customer needs and purchasing intentions.
- Give staff the tools to ensure they are better informed than increasingly connected customers.
- Educate staff about the customer journey and customer experience, and arm them with data on customer background and purchasing behavior.
- Require staff to prioritize building relationships over selling products.



Sephora (France)

Sephora is a standout experiential brand. Offering a seemingly endless array of makeup, Sephora can be an overwhelming experience for the first-time in-store customer. Sephora recognized this early on, and actively guides its customers. It offers advice from professional makeup artists in-store and a number of fun apps online, such as Color IQ (helps customers find the best shade for their skin tone) and Virtual Artist (allows users to try on makeup before purchasing). By leveraging technology, Sephora creates a bespoke-yet-affordable experience.

Use Connectivity to Drive Convenience and Loyalty

- Make it easy to access information, compare merchandise, and find the perfect product.
- Minimize the time between product purchase and delivery.
- Optimize customer service to make returns and exchanges quick and painless.
- Create in-store and at-home interactive tools that teach customers how to use products.
- Use social media to interact with customers, respond to questions, and deal with issues quickly.
- Build communities around your brand and encourage sharing of product usage.

By reframing your products as experiences or services and building lasting relationships with customers, companies can craft a superior experience. While this is an achievable target, it is also a moving target. To keep up, we will now examine how technology can be used to innovate for tomorrow's customers.



Walmart (USA)

"Walmart is investing in a new way of handling in-store returns of online purchases that it claims could shrink the processing time to 35 seconds. Customers will be able to begin a return process on Walmart's app before bringing the item in question to any of its 4,700 stores. At the store, customers then scan a barcode with a smartphone and hand off the returned items at a dedicated express lane at the customer service desk, in what a Walmart executive said could take barely more than half a minute, far less than the few it takes now. It would also speed up the time it takes for a customer to get a refund, Walmart said."

—*Fortune*¹¹, "Walmart Aims for 35-Second Online Purchase Returns"



USE TECHNOLOGY TO INNOVATE FOR TOMORROW

Technology continues to revolutionize every aspect of customer experience, from customer engagement to in-store assistance, education, the shopping experience, operations, logistics, customer service, and much more. However, the resulting experience must fit a company's brand and customers, supported by technology rather than led by technology. In this section we'll look at how technologies are already transforming the customer journey.

"You've got to start with the customer experience and work backwards to the technology."

— Steve Jobs

Learn About Your Customers

Companies must use technology to learn about their customers before providing a better experience. For instance, Bluetooth beacons, smart shelving, and visual light communication technology provide real-time location tracking. Loyalty apps drive repeat business, aid in customization, and help in-store logistics. Usage apps gather reams of data to drive customer segmentation and personal suggestions.

RTB House (Poland)

RTB House, which specializes in advertising based on advanced retargeting scenarios, created a new algorithm that leverages deep learning. The algorithm analyzes massive amounts of data to recognize patterns in decision-making as a way to identify an internet user's next steps and decipher the user's attitudes and interests. Algorithms exploring the conversion rate not only collect and interpret the data for each ad's click-through rates, but also take into account information on how the websites were viewed and how the transaction was finalized.

Cloverleaf (USA)

In 2017, tech vendor Cloverleaf launched digital signage powered by artificial intelligence to analyze eye movements and facial expressions to give marketers insight into the effectiveness of their store displays. The digital screen wraps around a shelf and displays real-time ads. Using built-in optical sensors, the tool can detect anonymous information about shoppers to help retailers understand traffic patterns and customer demographics. The shelves do not collect personal information, but use facial recognition to scan for age, gender, and ethnicity.



33%

of Latin American-connected consumers buy in-store to avoid delivery-related hassles—the highest of any global region.



31%

of Middle Eastern- and African-connected consumers believe that stores are more trustworthy—the highest of any global region.



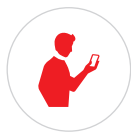
25%

of European-connected consumers buy in-store for the experience of shopping in-store—the lowest of any global region.



17%

of American-connected consumers buy online because they prefer not to deal with people—the highest of any country.



27%

of Asian-connected consumers buy online due to the availability of product information and reviews at their fingertips—the highest of any global region.

Source: Euromonitor 2017 Global Consumer Trends survey, covering 28,487 respondents across 21 countries. In-store¹² and online¹³ responses for selected reasons.

Make It Easy for Your Customers

As was previously noted in the Consumer Traits and Values chart on page seven, 68 percent of customers are more likely to make a purchase if the decision-making process is assisted or simplified. For instance, blockchain offers a foundation for uncontested product provenance. Artificial intelligence and voice assistants can provide hands-free support. Augmented and virtual reality help customers experience before purchase. Checkout innovations and last-mile solutions make shopping faster and easier.

There *is* light at the end of the tunnel!

Loft (USA)

Home design start-up Loft teamed up with the augmented reality team at Google's Tango and Climb Real Estate to develop an app that takes staging rooms into the virtual world. With this app, home buyers can virtually decorate rooms and then superimpose their vision onto existing properties using Google Tango's augmented reality camera. In addition, the app allows users to mix real-time views of interiors with their own creative ideas and then connects to a catalog of 100,000 3-D products from 35 leading home-furnishing retailers.

Amazon Go (USA)

Amazon Go, which promises to eliminate checkout altogether, leverages technologies such as machine learning, artificial intelligence, and sensors to recognize when products are taken off the shelf and automatically charge the customer's Amazon.com account. Customers scan their smartphones upon entering the 1,800-square-foot store, which offers prepared foods and other staples such as bread, cheese, and milk.

JD.com (China)

Chinese ecommerce giant JD.com is conducting drone tests of robotic devices that fly as well as navigate the streets. In late 2016, JD.com began trialing quadcopter drones that would drop off packages in more-rural areas, and has been testing a self-driving robotic vehicle, which can select its own routes, drive itself, and come equipped with smart obstacle-avoidance technology. When the self-driving drone arrives at its destination, the app notifies the customer, who is given a code to unlock the cargo.

Add Value for Your Customers

Customers have ever-higher expectations for their shopping experiences, and technology can add real value and build a relationship in the process. For instance, gamification entertains and educates. Product curation minimizes choice paralysis and adds a personal touch. True customization literally creates a customer-product bond. User communities further strengthen relationships.



Alibaba VR Shopping at NYC Macy's (China)

Alibaba brought virtual reality to its customer base in late 2016 through an immersive shopping experience called Buy+. This experience enables customers to browse items in a virtual shopping mall, including real-life stores such as Costco, Target, and Macy's. The user gazes at real items, which causes virtual ones to spring to life for greater interaction. Buy+ is integrated with Alipay's AR Pay, so the user can make a payment with just a few nods.

Mon Purse (Australia)

Mon Purse, a bag company set up at the end of 2014, uses the same 3D technology as gaming to allow customers to design their own bag—from the color and texture of the leather to the lining and metal details. The design process is simplified through provision of some classic bag designs that provide a clear aesthetic to follow, and runs algorithms to make sure colors and patterns don't clash. In the end, the customer is virtually guaranteed to end up with an item that is both fashionable and very much reflective of her or his personal style.



Proceed with Caution

Technology is a powerful enabler for enhancing the customer journey, but it should not get in the way of building an authentic relationship. Customers will quickly spot gimmicks, quit upon encountering technical difficulties, and get frustrated when technology and their needs are not aligned. Hence, remember the following considerations when implementing technology.

- **Data privacy and security:** As technology gathers ever-more data, customers must feel assured of what data is collected, where it goes, how it's used, and how well it's protected.
- **Appropriateness:** Data should be used to support customers in a way they don't find intrusive. Look for a balance between usefulness and privacy; this balance will differ for each customer.
- **Gimmicks:** When deciding whether to adopt a new technology, think in terms of use cases and how it can solve problems or enhance experiences. Technology should never be a gimmick.
- **Convenience:** Always consider how the customer will experience and interact with the technology. Then, design around ease of use and simplicity.

CONCLUSION

In a time of profound disruption and change for retail and consumer goods, businesses must pivot from selling products to providing a complete, end-to-end customer experience. This requires an understanding of the drivers shaping new customer needs and a willingness to use outside-in thinking.

We've used outside-in thinking to broaden our view and understand customer needs today, but the landscape is not static and it is essential to remain vigilant and stay ahead of the curve. The future of shopping will be easier, faster, more custom, more experiential, and more premium than ever before. Products will be reframed into services and experiences to meet customer needs and expectations, resulting in corresponding implications for the technology supporting your business. All of this will require the ability to handle ever-greater amounts of data for immediate, real-time use not just with customers, but also in sourcing, manufacturing, logistics, and that vital last mile.

The time to start making the changes is now. Reframe your business using outside-in thinking, then leverage the right technology to improve experience at each stage of the customer journey. With the right focus, your business will not just survive, it will thrive.

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⁴ Source: <https://www.publicity.com/marketsmart-newsletters/percentage-new-products-fail/>

⁵ “How much do you agree or disagree with the following statements? I find I am looking for ways to simplify my life / I only buy from companies and brands that I trust completely / I like to be distinct from others / It is important to me that other people think I am doing well / I prefer branded goods to nonbranded alternatives.”

⁶ Source: http://www.lse.ac.uk/intranet/LSEServices/communications/pressAndInformationOffice/PDF/AdvocacyDrivesGrowth_5-9-05.pdf

⁷ Source: <https://hbr.org/2014/08/the-value-of-customer-experience-quantified>

⁸ Source: <https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/best-of-both-worlds-customer-experience-for-more-revenues-and-lower-costs>

⁹ “How much do you agree or disagree with the following statements? I prefer to spend my money on experiences, rather than things.”

¹⁰ “Thinking about your shopping habits, what are some of the reasons why you buy products in-store? Please check all that apply. See or try before buying.”

¹¹ Source: <http://fortune.com/2017/10/09/walmart-returns-amazon-online-sales/>

¹² “Thinking about your shopping habits, what are some of the reasons why you buy products in-store? Please check all that apply. No delivery-related hassles / Stores are more trustworthy / Experience of shopping in-store.”

¹³ “Thinking about your shopping habits, what are some of the reasons why you buy products online? Please check all that apply. I prefer not to deal with people / Product information, comparison, and reviews at my fingertips.”

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