Siebel CRM Quote and Order Capture - Quote and Order Life Cycle Management

Oracle's Siebel Quote and Order Life Cycle Management applications enable organizations to create, validate, and manage quotes and orders across the entire order life cycle. They support complex pricing and product configuration, quote approval, availability checking, and credit and payment verification. As a result, they provide business with a single, integrated system that ensures that orders are complete, valid, and accurate before they are delivered to the customer.

KEY FEATURES

- Accurately create quotes and orders
- Automate quote and price approvals
- Manage price and product negotiations
- Support complex business policies
- Support credit and payment verification
- Create a single integrated order management system

KEY BENEFITS

- Increased employee productivity by managing order information in a single integrated system
- Reduced time to market by offering capabilities such as product bundling and guided selection
- Reduced operating costs by eliminating incorrect orders

Users can quickly prepare accurate quotes for review and approval by customers—resulting in faster movement of orders through the pipeline.

Siebel Quote and Order Capture helps organizations to:

• Reduce operating costs by eliminating incorrect orders and verifying that products are available and correctly configured before confirming orders

• Streamline the approval process by minimizing manual intervention while assuring compliance

• Reduce time-to-market for new products and services by offering capabilities that assist in the creation of optimal bundles and the guided selection of the right products

• Negotiate with customers and partners during the order creation process

• Increase employee productivity and satisfaction by managing order information in a single, integrated system

Siebel Quote Management

Oracle's Siebel Quote Management ensures that customer quotes are accurate and profitable. It allows companies to negotiate sales with prospects based on a variety of factors, including products, price, availability, and other terms and conditions. It streamlines the quote development process by routing quote exceptions for approval, ensuring compliance among customers, partners, and employees. Revenue associated with the quote can be transferred to the opportunity in order to maintain accurate forecasts and charts.   In addition, Siebel Quotes allows organizations to increase their revenue though cross-sell/up-sell messages and promotion and offer recommendations.

Siebel Order Management

The order management life cycle includes tasks that fall into three groups:

Preorder tasks - Includes creating accounts, contacts, and opportunities or helping anonymous customers through the needs-analysis process.

Order entry tasks - Include selecting products and services, capturing quotes and orders, verifying products and pricing, checking availability to promise, entering shipping, tax, and payment information, and performing a credit check.

Post-order tasks - Includes fulfilling the order, providing the customer with order status, notifying the customer that the order has shipped, creating supplemental orders, and monitoring or modifying activities that support the order, such as installation.

Siebel Contract Management

Siebel Contract Management supports the life cycle of an agreement, from service opportunity identification, service pricing, proposal generation, and service delivery on contractual commitments to agreement additions, cancellations, and renewals.

Users can define the terms of an agreement between the customer and the service provider. These terms can include the contractual obligations for the service provider, such as performance metrics, response time, equipment maintenance responsibilities, service pricing, discounts, and service entitlements. Agreement entitlements allow users to define service offering details and to specify tiered pricing for offerings and levels of coverage for customer assets.

Additionally, Siebel Contract Management allows users to specify the terms of installment payments, renting, leasing, financing, and usage-based pricing. After you establish a service agreement, the recurring, nonrecurring and usage-based charges for the agreement can be automatically invoiced. Users can also track and forecast financial and service revenue information resulting from the sale of service offerings, individual service agreements, and across the service organization overall.

Service providers can use product warranty and off-warranty agreement expiration data to reprioritize service sales resources. Combined with Oracle Business Intelligence Applications, Siebel Contract Management allows users to assess customer service needs, personalize service offers, and customize coverages.

Siebel Asset Based Ordering (ABO)

Asset-based ordering allows quotes and orders to be created according to a customer's existing assets. Asset-based ordering is particularly useful in supporting companies whose product offerings include complex service products, such as phone services and equipment. Asset based ordering allows companies to:

- Create quotes for new products and services based on existing assets

- Create quotes to modify existing products and services

- Modify in-process orders that have been submitted for fulfillment

- Move, suspend, resume, or discontinue an existing service

- Have visibility into the asset life cycle during customer interactions

Asset based ordering increases companies' revenue opportunities through upgrade orders and improves customer service by tracking warranty and predictive maintenance. Asset based ordering features are based on Siebel workflows and can be extended to

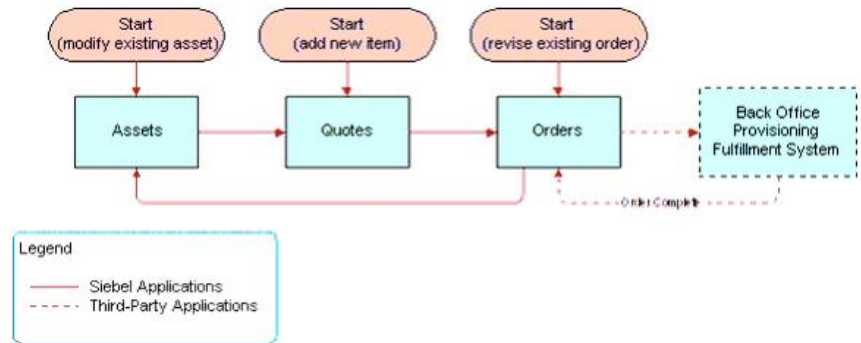meet the specific needs of any organization.

Figure 1 shows the cycle of events for asset based ordering

Siebel Bulk Orders

Siebel Bulk Orders provides the capability to generate a large number of orders resulting from bulk purchases or marketing promotions. Bulk Orders support both business-to-business and business to consumer transactions involving the sale of bulk quantities of products/services. Listed below are examples of business scenarios

- Axiom corporation purchases 200 wireless services with pre-assigned numbers

- A.K. Parker Distribution Inc. requests that Voice Mail be added for 50 Users.

- Timbers Consulting Co. requests that 50 Users be upgraded from GSM Voice Service Package to GSM Voice/Data Service Package.

- As a result of a marketing promotion, add Movie channel to all customers (different Accounts) with Basic Cable Service in zip code 98004

Bulk Orders supports the following functionalities:

- Streamline the creation of New/Modify/Disconnect/Upgrade/ Suspend/Resume orders for a group of users or services.

- Allow the creation of bulk request via XML Import.

- Ensure accuracy through account, service profile and product validation.

- Provide exception management and re-submission.

- Integrate with Universal Inbox for notification

- Enable asynchronous processing to maximize user throughput.

Siebel Order Analytics

Siebel Order Analytics provides organizations with the tools needed to gain deep understanding into the order pipeline and order management process. The application provides up-to-the-minute insight into quote-to-order conversion rates, methods of payment and shipping, order trends, and operational performance. Using this

information, operations professionals can take action to prevent or eliminating order processing bottlenecks, streamline the order process by identifying common order exceptions, and plan staffing around those locations with the heaviest transaction volume.

Summary

Oracle's Siebel Quote and Order Lifecycle Management is a market leading solution that includes

- Support for sales-facing business processes

- Industry-specific functionality

- End-to-end process integration

- Service Oriented Architecture and flexible, scalable infrastructure

- Multi-channel support, including self-service. Partners, Call Center, Sales Rep, Retail & Online

- Proven customer success

- Extensible UI framework

- Disconnected mode

- Large scale global deployments

- Powerful policy enforcement through numerous engines & policies

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