

## Siebel Retail Execution Winning in the Last Mile



**From understanding issues in execution to resolving or preventing them, Oracle enables targeted and efficient in-store execution to assure market success.**

### KEY FEATURES

- **Comprehensive:** Enables complete retail execution management – from planning through in-store call execution
- **Productive:** Continues to transform the role of the field sales force by optimizing in-store efficiency, enabling more upsell within each call
- **Collaborative:** Supports the disparate needs of field sales management and the field sales force, marketing and brand management, and sales account management
- **Real-time:** Provides real-time calls to action based on key performance metrics and social insights, and dispatches urgent retail calls in real-time
- **Executable:** Supports the end-to-end retail execution process, including complex cycle and coverage planning
- **Demand-driven:** Leverages downstream retail data with other available performance sources to optimize in-store performance
- **Intelligent:** Organizes insights such that the business intelligence leads to the appropriate action
- **Secure:** Full security and access capabilities enable use in both connected and disconnected modes, and for employees, customers, and brokers

*Oracle's Siebel Consumer Goods Retail Execution optimizes organizations' in-store efforts to stimulate and meet consumer demand. Whether tackling merchandising and up-sell or the more complex Direct Store Delivery process, the solution helps to ensure that consumers will always find the right product in the right place at the right price.*

Ensuring efficient and effective in-store execution of your marketing, pricing, and promotional plans is a strategic issue fraught with tactical challenges. In an industry where a 10% change in planogram compliance results in a 1% change in out of stock rates, it is vital that these challenges be met.

The needs range from defining which of the hundreds of thousands of retail points require or deserve in-store servicing to executing thousands of retail calls daily, each containing the mix of compliance, upsell, and order taking or fulfillment activities appropriate to a specific combination of retail sales representative, store, and circumstance. Universally, though, there is a need to first convert masses of data into simple executable actions, and then to perform those actions in the most efficient and user-intuitive fashion possible. It is also important that planning and re-planning these activities is allowed for in the most automated and flexible way possible, to take advantage of the mobile sales force's ability to shift direction with a turn of the steering wheel and ensure that their efforts are expended where they will have the greatest impact on the business.

From coverage planning and analysis through call planning to van and inventory management and in-store execution, Oracle's Retail Execution solution ensures companies around the world can operate multiple and overlapping field forces optimally. Insight-driven capabilities such as social listening, real-time dispatching and route scheduling, and rules-based generation of retail activities from store level demand signal data enable customers to direct retail efforts based on best return to the business. With both modern mobility and traditional handheld solutions, Siebel Retail Execution provides deep functional support for direct store delivery as well as rich merchandising and field service tablet and smartphone solutions.

As with all Oracle Siebel Consumer Goods solutions, Siebel Retail Execution is seamlessly integrated with the Oracle Business Intelligence suite to provide comprehensive reporting and analytics, enabling in-depth analysis of call performance, in store audit results, merchandising surveys, and more.

### Demand Driven Customer and Category Planning

Effective execution requires shrewd and flexible planning. Siebel Retail Execution meets this challenge with an agile planning hierarchy that incorporates activities and inputs from across the organization, while maintaining final control in the hands of field sales management.

This planning begins with an understanding of the customer base and its sales and service needs. Leveraging real-time customer segmentation, the most valuable

**RETAIL CALL PLANNING**

- Analytic segmentation and scoring based on attribute combinations
- Flexible rules based territory definitions
- Automatically schedule retail calls based on established routes
- Set performance targets and metrics with clear timelines for achievement
- Provide input to retail execution teams through integrated creation of promotion retail objectives
- Enable clear top-down tracking of pursuit and achievement at retail outlets
- Generate store level calls either manually or automatically, leveraging routes or ad hoc scheduling
- Analyze retail field force workload and performance based on audits, assessments, and activities

customers are identified and the field needs compared to field capacity to determine coverage potentials and identify needs to reevaluate store service levels, realign territories, or augment staff.

Whether in terms of the in-store sell-in and set-up activities needed to keep the business going or the audits needed to ensure that inventory and promotion plans are on target, headquarter planning is ineffectual without in store execution. As planning occurs within both the marketing and account teams, in-store activities are allocated to individual stores or store groupings for targeted execution of these key initiatives. Both planning and the results of the in-store activities are provided back to the marketing and account managers in-line with their own respective processes, enabling full closed loop planning and execution of those plans, as well as rapid alerting of issues based on identified plan parameters and real-time store feedback.

The wealth of store level demand signal data available is a key boon for targeted retail execution. The Oracle Demand Signal Repository gathers, cleanses, and harmonizes this data on a real-time basis, continually monitoring the data across store locations to identify exceptions such as out of stocks and in-flight promotion performance issues. Leveraging flexible rules-based analysis, the most urgent exceptions are evaluated against current inventory data, promotion data, call history, and store replenishment rules to generate priority retail activities for such activities as compliance checks, product audits, and immediate restocking.

Region	Product Category	Exception	Amount	Week End Date
Pacific	Bottled Water	In-flight Promotional Lift	\$560	08-May-11
		Out of Stock On Hand	\$00	
		Reminder Point	\$380	
	Carbonated Soft Drink	Sales Forecast Accuracy	\$11,254	
		In-flight Promotional Lift	\$138	
		Out of Stock Imputed	\$735	
		Reorder Point	\$187	
		Sales Forecast Accuracy	\$3,407	
		In-flight Promotional Lift	\$1,202	

Figure 1 Oracle Demand Signal Repository

**Action Oriented Retail Execution**

The true test of a Retail Execution solution is the extent to which it enables the field force to work more efficiently and on the optimal tasks to ensure success at store. Siebel Retail Execution provides out-of-the-box support for both Retail Execution and Field Service processes leveraging the open and customer extensible Siebel Open UI architecture. With complete process support from management of van/truck/trunk inventory, through complete in-store execution, to call reporting, cash management, and reconciliation, Siebel Retail Execution builds deep industry and process expertise directly into the solution, to ensure faster uptake and deployment of these core capabilities.

The Siebel Mobile solutions are HTML5-based and support both smartphone and tablet form factors across all key modern mobile operating systems, notably iOS, Android, Blackberry, and Windows, utilizing a develop once, deploy anywhere methodology. Siebel Mobile also provides the option to leverage on-board device interactions including camera, phone, email, signature capture, and GPS. Mapping integration leveraging GPS, for example, is a key field force enabler used to deliver both route visualization and turn-by-turn directions.

**RETAIL CALL EXECUTION**

- Manage route and calendar based retail call schedules
- Support complete in-store execution ranging from audits and compliance checks to Direct Store Delivery order-to-cash cycles
- Enable mobile inventory management by individual location and type (good, damaged, etc), including scheduled and ad hoc cycle counts
- Provide visibility to key account and information such as profile, in flight promotions, products in distribution, assets in place, etc
- Automatically track time for completion of call activities and total call
- Provide real-time, in-memory scheduling
- Respond instantly to planned and un-planned events
- Continually re-optimize schedules automatically throughout the day
- Reconcile cash and inventory for daily close-out

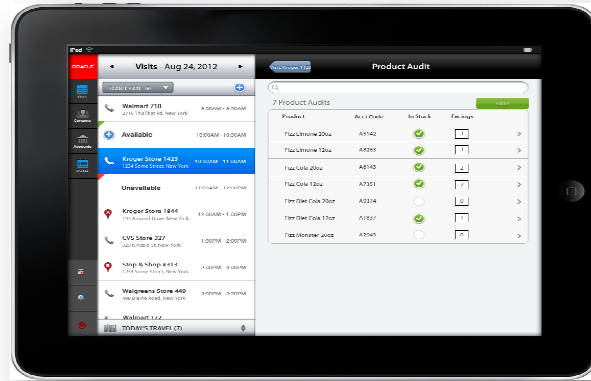


Figure 2 Siebel Mobile for Consumer Goods

**Leveraging Social Insights to Drive Action**

With the burgeoning impact of social across the consumer and customer sphere, manufacturers have a new opportunity for real-time store feedback. Establishing a channel for collaboration and alerting with key retailers is a simple and powerful means to enhance the partnership and ensure rapid actioning of key issues. Oracle supports this collaboration through our integrated Social Relationship Management tool, within which one can perform listening and semantic analysis, engage and market directly across social networks, and specifically tag channels or individual posts to be routed to Siebel for resolution. Within Siebel, then, users have visibility to the social aspects of contacts as well as the specific social interactions surrounding targeted issues.

Social listening can also be used against all consumer activity to listen for store level execution issues before the sales data reflects them or the service call is made. Targeting listening intelligence to identify these issues leads to earlier identification and earliest possible resolution.

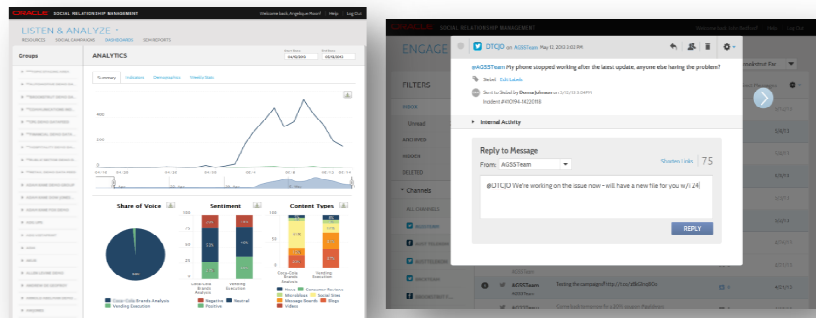


Figure 3 Oracle Social Relationship Management

**Ensuring Right Time, Right Place Real-Time Scheduling**

Both account teams and customer needs are dynamic, and the optimal alignment of these two elements in today's fluid markets calls for more than simple route scheduling. The Oracle Real-Time Scheduler is now integrated with Oracle's Siebel suite in order to power optimal route planning and real-time dispatch needs.

Real-time appointment booking enables organizations to dynamically check the live schedule each time a customer call is booked, resulting in a highly efficient schedule and appointments offered secure in the knowledge that they can be honored, while point-in-time GPS tracking enables aspects such as map based visualization of the current location of all field representatives or a replay of the recent route of any given representative.

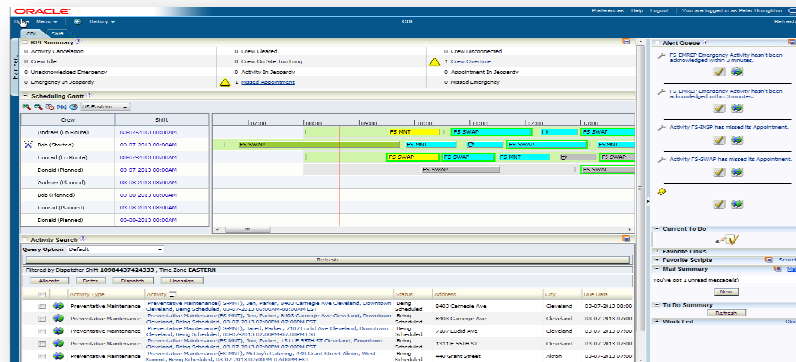


Figure 4 Oracle Real-Time Scheduler

This solution optimizes the scheduling and dispatch of retail calls based on the organization’s established routes, business rules, and priorities while minimizing the impact of in-day events such as delays on site, sickness, poor weather conditions, and vehicle breakdowns.

### Providing Comprehensive Solutions for Consumer Goods

Oracle Consumer Goods delivers the industry’s most complete solution to manage the complex trade marketing process – from headquarter and account planning through retail execution. Industry best practices for these processes embedded directly in the application minimizes the need for customization and leads to a faster ROI and a lower total cost of ownership. With available support for processes such as retail execution, order and pricing management, display and asset management, and consumer and service call centers, Oracle Consumer Goods provides an unparalleled range of integrated solutions for consumer goods.

### Contact Us

For more information about Oracle’s Siebel Consumer Goods application suite or Siebel Retail Execution, visit [oracle.com](http://oracle.com) or call +1.800.ORACLE1 to speak to an Oracle representative.



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**Hardware and Software, Engineered to Work Together**