

TRACK: Oracle Siebel CRM

Welcome !

Apps Unlimited – Colombes, Paris

Richard Spearman

Master Principal Solutions Engineer, Siebel CRM

Oracle Applications Unlimited Day 2022



Siebel CRM

What's in it for my Business ?

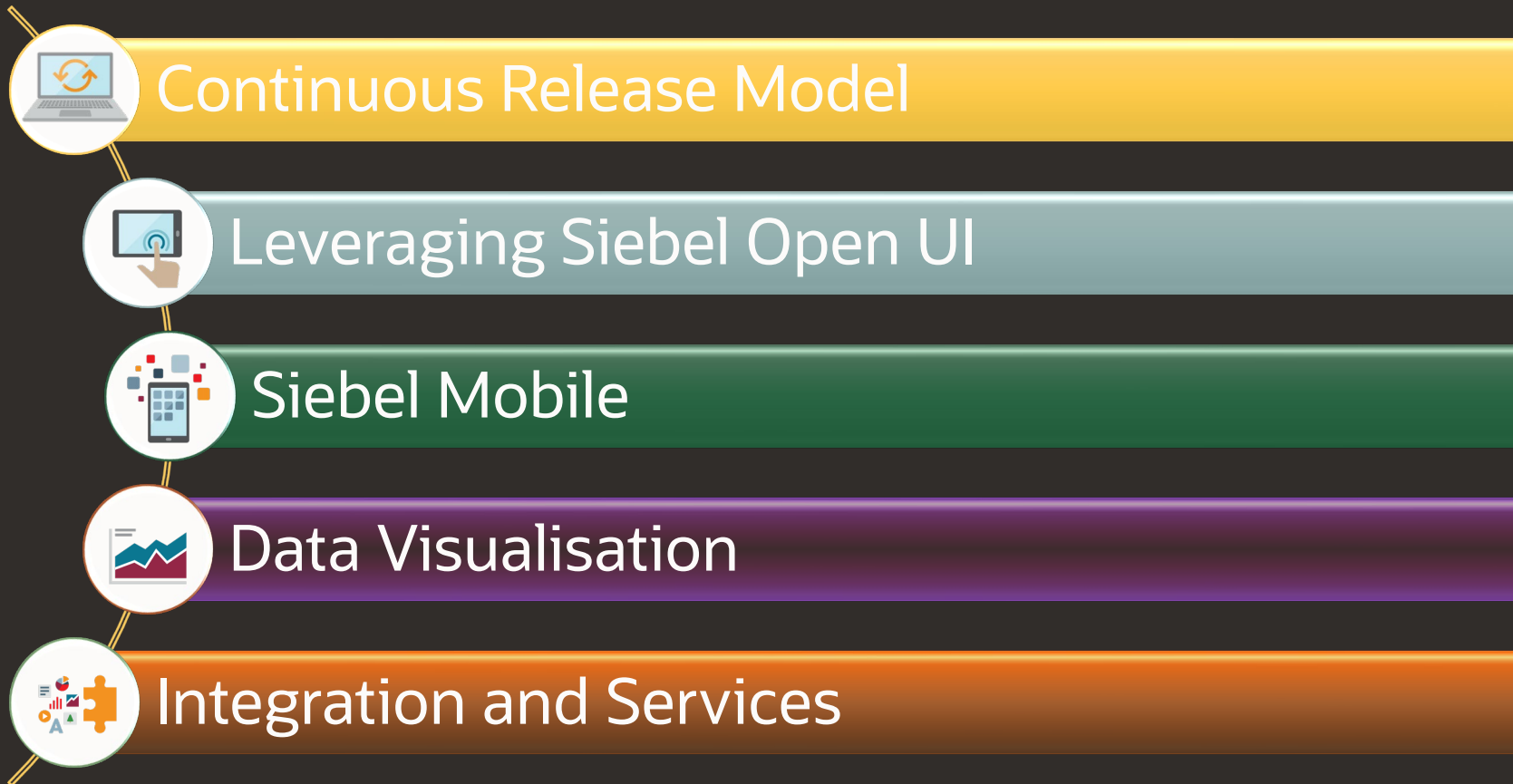
Innovation and Value beyond the Technology

Richard Spearman
Siebel CRM Solutions Consulting Lead, Western Europe

Oracle Applications Unlimited Day 2022



Value and Innovation for your Business

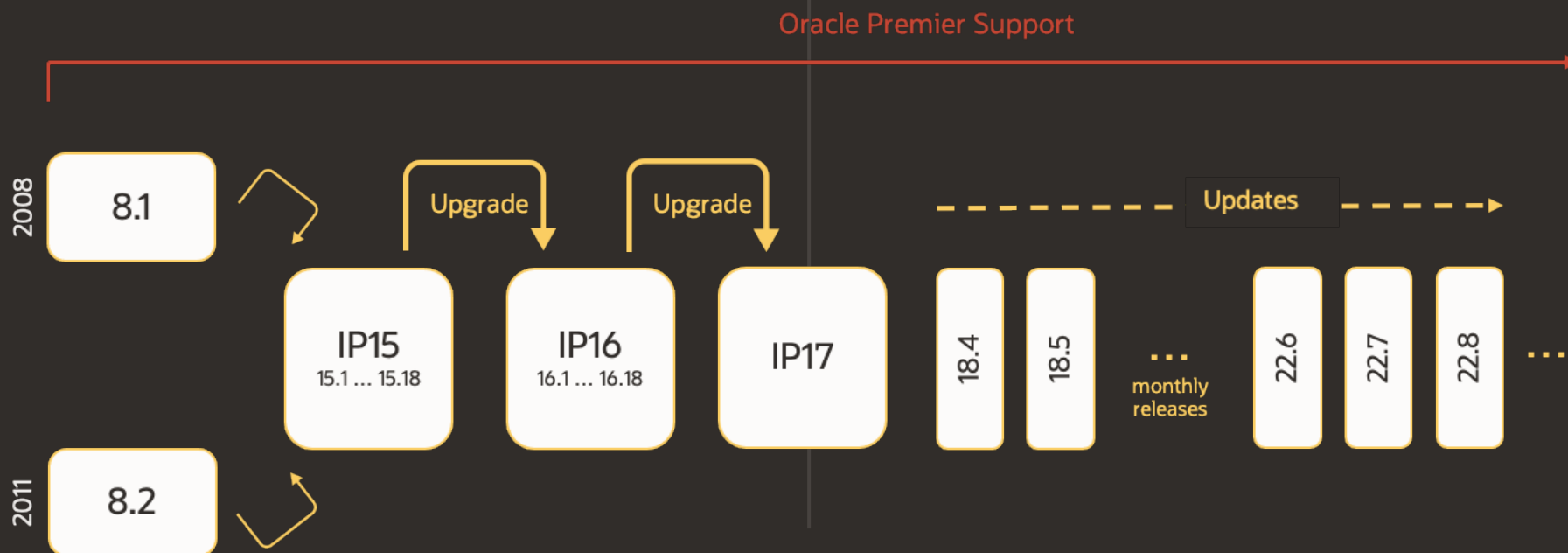




Siebel Continuous Release Model

In 2018 Siebel moved to a new release model with **monthly, cumulative updates** that can be applied with less risk and effort. This approach should **dramatically lower the cost of ownership**

- We recommend customers apply updates on a quarterly basis to take advantage of:
 - Bug fixes
 - Updated certifications
 - New features
 - Product Enhancements



Customers Live with the Continuous Release Model

CABLE / TELCO



FINANCE / INSURANCE



FINANCE / INSURANCE



LIFE SCIENCES / HEALTHCARE



AUTOMOTIVE / HIGH TECH



CONSUMER GOODS / RETAIL



PUBLIC SECTOR



PROFESSIONAL SERVICES / HOSPITALITY



Deliveries for the Business

Functional enhancements and new features

- Mobility and flexibility
- UI framework for outstanding user experiences



Siebel Open UI



Siebel's User Interface

- Introduced from 2011 onwards
- Designed to work with any browser on any device
- Uses standard browser HTML, CSS style sheets, Java just like any other web app
- Provides the tools and features to change appearance, colour scheme, and add custom style & branding

The screenshot displays the Siebel Open UI interface, which is a web-based application for managing customer accounts and service history. The interface is divided into several sections:

- Accounts Section:** This section shows the details for a specific account, 'Voyages SARRO'. It includes fields for Name, Site, Main Phone, Address, City, State, Zip Code, Country, Main Fax, Organization, and Account Team. The account is currently active and associated with the 'Metro Motors M' organization and 'GMORRIS' account team.
- Service History Section:** This section displays a list of service history records. The table below shows the first few records:

SH #	Name	VIN #
296-118326705	Tyre change	0011BUS7
296-118326708	60000km service	2016NAVC
296-118326711	Door fault	2016NAVC
296-118326714	Oil change	12BG5KKL
296-118326717	180000km service	2016NAVC
296-118326720	Tyre change	87FG4HPW28347AB

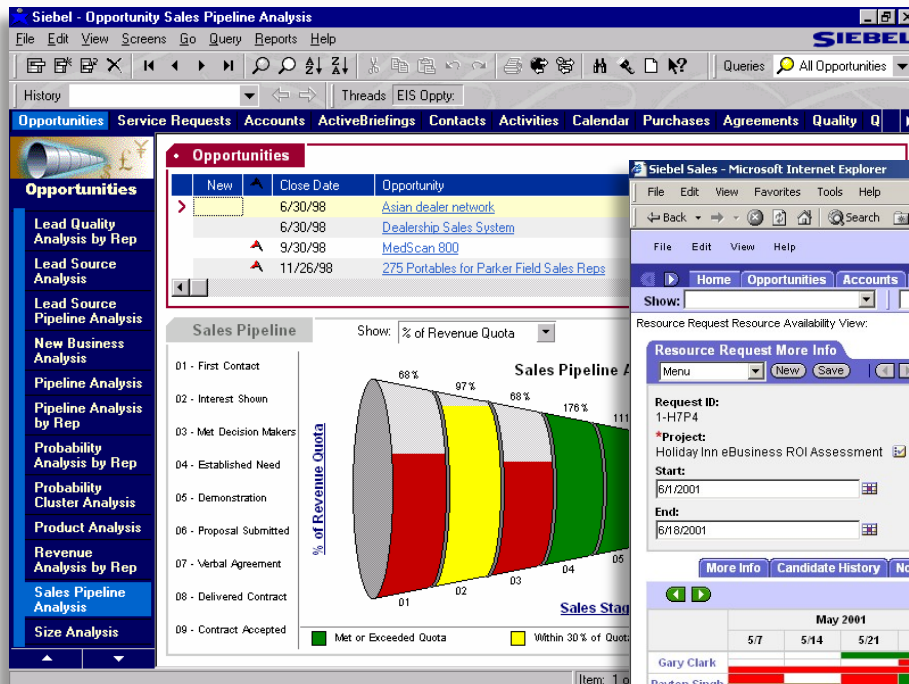
The 'Activities' section shows a list of activities related to the account. The table below shows the first few activities:

Overdue	Done	Type	Description	Status	Employees	Last Name	First Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Call - Inbound	Call from customer - new bus purchase	Done	SAGNES	Martin	Olivier
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Call - Outbound	Call Lead contact to verify interest and schedule...	Unscheduled	SAMOORE	Buades	Janine
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	In Store Activity	Research lead and contact history to understand...	Unscheduled	SAMOORE		

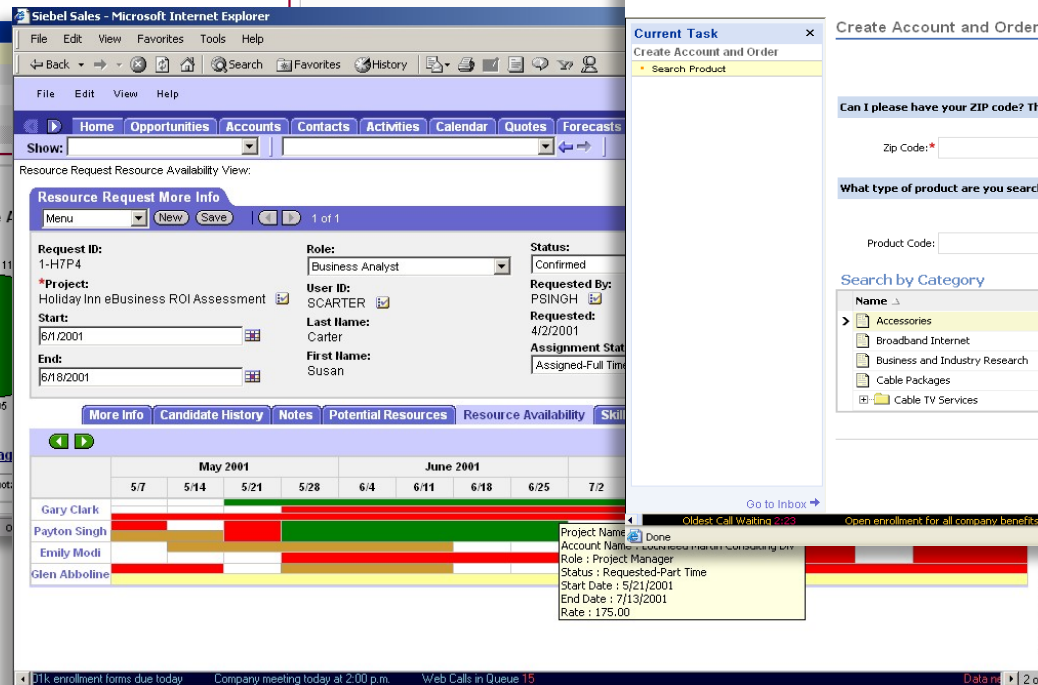
The 'Service History' section shows a detailed view of a specific service history record. The table below shows the details for the record with SH # 296-118326711:

Service History	Total Customer Payment	Total Manufacturer Payment
SH # 296-118326711	Labor \$50.00	Labor \$30.00
Name Door fault	Misc. \$0.00	Misc. \$10.00
VIN 2016NAVC0129	Parts \$10.00	Parts \$80.00
Serviced Date 12/19/2017 12:00:00 AM	Amount \$60.00	Amount \$120.00

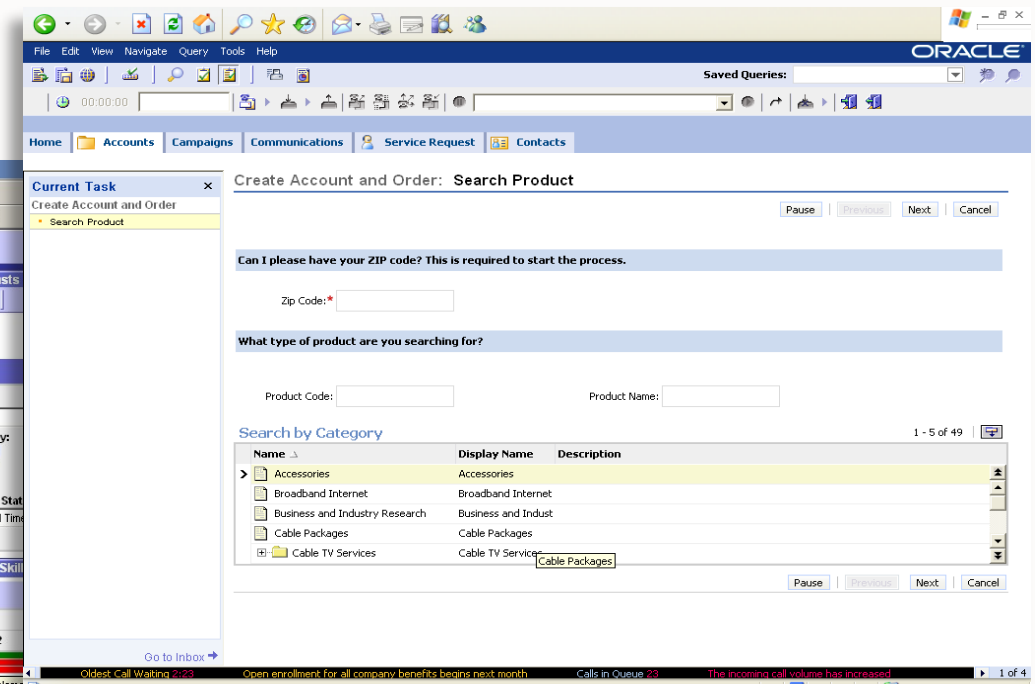
Evolving User Experience



2000 : Laptop-only



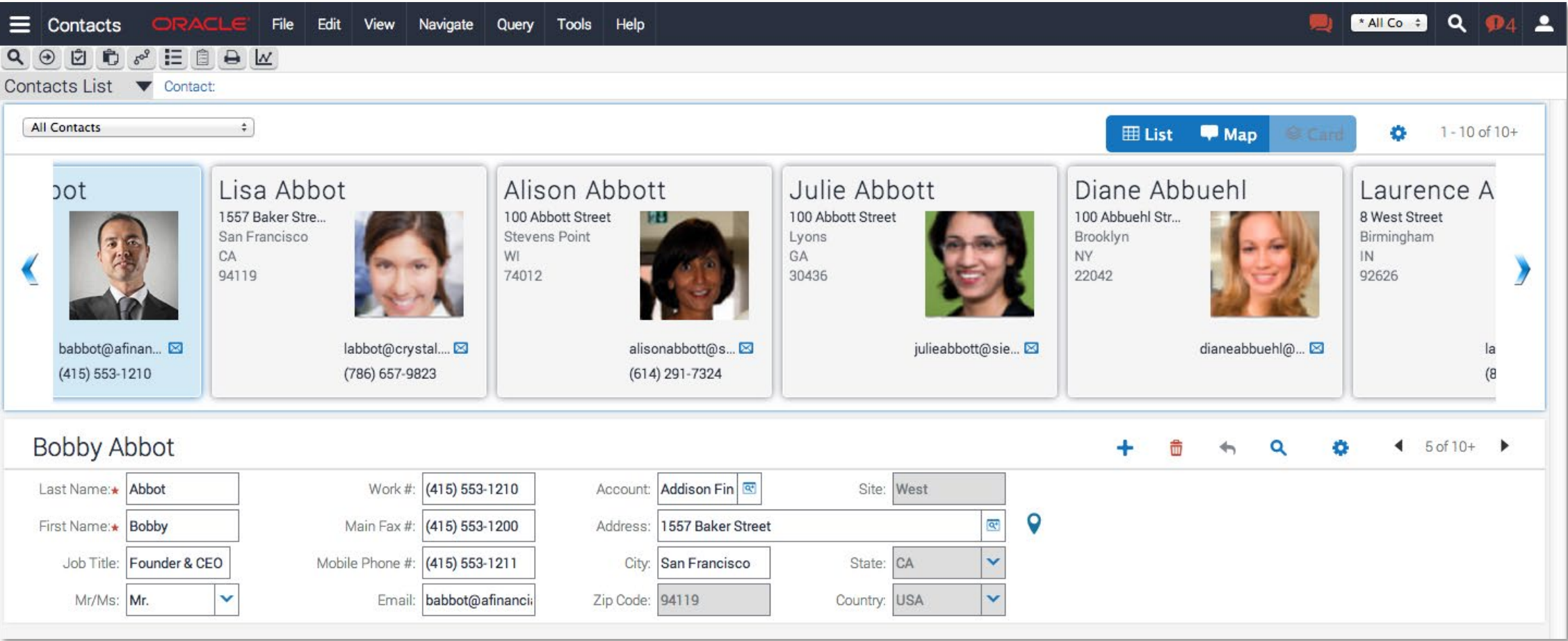
2006 : Internet Explorer Browser



2013 : Any Desktop Browser



Evolving User Experience



2019 : Any Browser, phone, tablet, desktop



Dozens of Subtle Enhancements

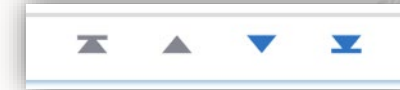
The Siebel Open UI is constantly being updated to match common web app themes and conventions:

- Elastic List Applets - efficient display of list records
- Unsaved Data Indicator
- Attachment View – no need to download
- Field Prompts – cleaner and clearer
- Modern navigation icons



← Old
New

Navigation
Icons



File View

Attachments		
New File	New URL	View File
Attachment Name	Size (In Bytes)	Type
55.0.2883.87	224	manifest

Orders

Billing Account Citi

Status Order Date Type Order # Billing Account Billing Profile Service Account

<Case Sensi

Elastic List Applets

Unsaved Data Indicator

Addresses

Primary Address Line 1 City State Zip Code Country

1855 South Grant St. San Mateo CA 94404 USA

Unsaved Data

Field Prompts

Sign In

User Name

Password

Sign In



Sign In

User Name

RMOSS

Password

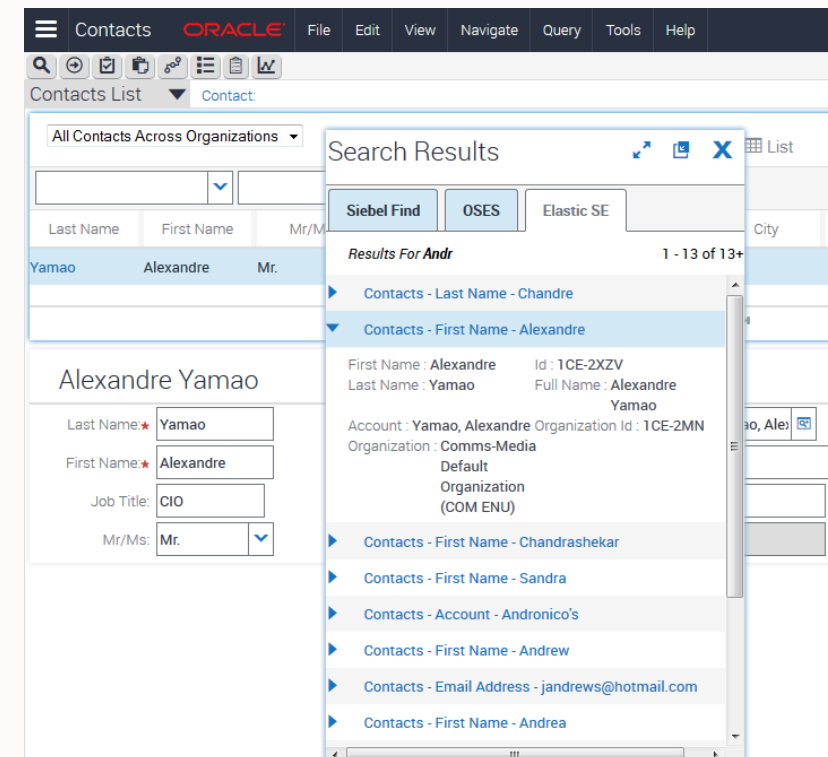
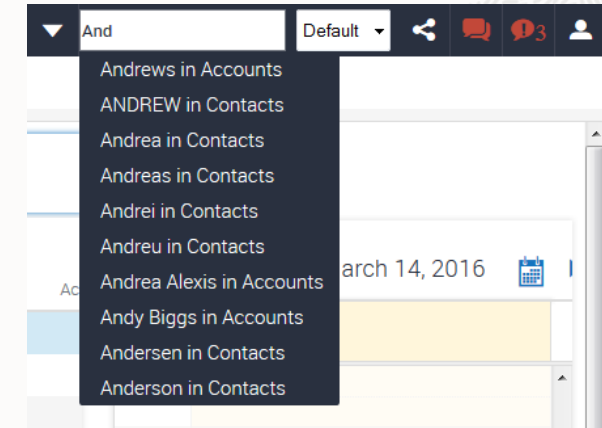
....

Sign In

Simplified Search

Siebel search has been enhanced to offer more modern and flexible search capability and to work with 3rd party search engines for a more Google-like experience:

- Siebel Search now supports the Elastic Search Engine
- Siebel's "Application Search" in the menu bar now more flexible
- Results of an Application Search are displayed in a separate search pane, showing instances of matching records
- Users can drill into displayed records providing they have appropriate visibility
- Offers users a new way of working with Siebel – easily and instantly find customer, vehicle etc data without having to remember where to look first



iHelp Embedded Help and Guidance

Context-sensitive help and guidance

- Navigates users through a task or process
- Can be used as an aide-memoire or, by clicking on each step, to navigate between views and highlight important fields or buttons
- Easy to set up, no IT involvement needed
- Supports multiple languages
- Feature was available in older versions of Siebel but removed with the introduction of Open UI and has now been made available again.

The screenshot displays the Siebel CRM interface with a sidebar on the left containing a 'How do I...' help panel. The main area shows the 'Dealers' view with a form for 'Marshall's Motor Company' and a table for 'Partner Contacts'.

How do I...

- Create an Activity for a Dealer**
- Locate Dealer**
 1. **Navigate** to the My Dealers View and click the **Query** button.
 2. Enter the appropriate search values and click the **Go** button
 3. Click the Dealer **Name** hyperlink for the desired account
 4. Within the details view for the details, click the Activities view tab
- Create New Record**
 5. Click the **New** button
 6. Select the activity **Type** from the drop down list
 7. Type a **Description** for the activity
 8. Enter a **Due** date if you wish to override the defaulted date
 9. Select the **Status**, and **Priority** values from the lists
- Associate to an Opportunity**
 10. You can associate this Activity to a deal by clicking the **Opportunity** field, then the embedded icon
 11. After selecting the desired Opportunity, click the **OK** button in the selection dialog
- Save Record**

Dealers ▾ **Dealer:**

Marshall's Motor Company

Name* Marshall's Motor Co Main Phone # +441189242345

Address Kiln Farm Lane

City Reading State State City

Zip RG2 6BA Country United Kingdom

Dealer Contacts ▾

Partner Contacts

++ [] [] +

Last Name	First Name	Job Title	Work Phone #	Email
Smythe	Anna			

View to query, create and delete

Adapting the Siebel User Experience

Open UI enables organisations to adapt Siebel to fit with their corporate brand and deliver a more personalized user experience (UX), without complex coding or niche developer skills

- Successful customer UX projects deliver results – **Die Mobiliar**, a Swiss insurance company, improved productivity by **75%**
- Examples:
 - Customer 360 dashboard
 - Client briefing
 - Corporate client 360 dashboard
 - Agent / Broker Portal
 - Customer direct service portal

The screenshot displays the die Mobiliar Siebel CRM interface. At the top, there's a navigation bar with tabs like 'Startseite', 'Verkaufschancen', 'Personen', 'Unternehmungen', 'Verträge', 'Beschwerden', and 'Aktivitäten'. Below this, a welcome message for Jorge Llanos is shown. The main area features a search bar with filters for 'Neue Person', 'Neue Personengruppe', and 'Neue Unternehmung'. Below the search bar, there are several widgets showing counts for 'Meine Neue Aufträge', 'Meine Pendente Aufträge', 'Total Inbox Aufträge', 'Meine Neue VC-Aufträge', 'Meine Pendente VC-Aufträge', and 'Total Inbox VC-Aufträge'. A table titled 'Meine Aufträge' lists tasks with columns for 'Neu', 'Fortschritt', 'Person', 'Unternehmung', 'Auftragsart', 'Betreff', and 'Beschreibung'. The table shows several tasks, each with a star icon and a red progress bar.

Neu	Fortschritt	Person	Unternehmung	Auftragsart	Betreff	Beschreibung
★		Götschmann		Auftrag aus Kampagne	MyMobiliar - Neuer...	Kunde hat neuen Fremdvertrag im...
★		Fonseca		Auftrag aus Kampagne	MyMobiliar - Neuer...	Kunde hat neuen Fremdvertrag im...
★		Gubel		Anfrage	MyMobiliar - Neuer...	Kunde hat neuen Fremdvertrag im...
★		Thügel		Zuweisung	MyMobiliar - Neuer...	Kunde hat neuen Fremdvertrag im...
★		Sigg		Zuweisung	MyMobiliar - Neuer...	Kunde hat neuen Fremdvertrag im...



UX Example: European Motor Manufacturer

Siebel UI tailored to customer needs:

- Customer 360 core details clearly shown
- Sections expand to capture additional info
- - modern experience
- Clear task guidance with progress bar to highlight steps
- Intuitive and easy to navigate

The image displays three overlapping screenshots of the Siebel UI, illustrating a modern, customer-centric design for a European Motor Manufacturer.

Left Screenshot: Company Form

This view shows a form for creating or editing a company. The form is organized into sections: Company, Address, and Contact. The Company section includes fields for Name, Type, Status, VAT No., and Tax Code No. The Address section includes fields for Street, P.O. Box, City, Postal Code, House No., and Address Line 2. The Contact section includes fields for Name, Title, and Email. A progress bar at the top indicates the current step in the process.

Middle Screenshot: Customer Information

This view shows the Customer Information page. It displays a summary of the customer's details, including Name, Address, and Contact Information. A progress bar at the top indicates the current step in the process. The page includes tabs for Details, Approval, and Agreement Approval Progress.

Right Screenshot: Companies List

This view shows a list of companies. The list includes columns for Company Name, Address, Contact Information, and Status. A progress bar at the top indicates the current step in the process. The page includes tabs for Companies, Contracts, Company Hierarchy, and More Info.

Example: Proximus Customer 360

Siebel UI tailored to customer needs:

- Customer 360 core details clearly shown
- Context sensitive menus and tasks
- Belgian Telco “Proximus” presented this example to the Siebel Customer Advisory Board (CAB)

*Search Google for
“Siebel Proximus”*

The image displays two overlapping screenshots of the Siebel Customer 360 interface. The top screenshot shows the 'Customer Details' form for 'PARDON Jordi (615056573, RES)'. The form is divided into several sections: 'Customer Details' (Status: Customer, Customer Type: Ordinary subscriber), 'Customer Identity' (Title: Mrs, First Name: Jordi, Name: PARDON), 'Official Address' (Address Line: Quai du Halage, Zip Code: 4400), and 'Language' (Legal Language: French, Comm Language: Dutch). The bottom screenshot shows the 'New' menu with options like 'New Enterprise Mobile', 'New Install', 'New Mobile Voice', and 'New Norton'. It also displays a list of 'Standalone products' under the 'MIB/MCOM' category, including various mobile internet and voice services with their respective IDs.

Example: Vodafone Contact Centre

Original Siebel UI

Goal:

- Revise UI to make it more task-oriented and visually appealing
- Align it more closely to actual business processes
- Retain Siebel Open UI framework

The screenshot displays the Siebel Open UI interface for a Vodafone contact center. The top navigation bar includes tabs for Home, Accounts, Contacts, Agreements, Guided sales process, Orders, Saved Basket, Trouble Tickets, Service Requests, All Premises, and Customer Comms. Below this, a sub-navigation bar shows Account Overview, Account Security, Accounts Home, and Accounts List. The main content area is titled 'PUNIT BHATIA' and contains several sections: Account, Contact details, Business details, Address, and Account Alerts. The Account section shows fields for Account name, Account no., Account status, Anonymous, Account type, and Customer since. The Contact details section shows fields for Title, First name, Last name, Date of birth, Online account, and Churn indicator. The Business details section shows fields for Company reg. no., VAT reg. no., Charity no., Trading As, Legal status, and Match company status. The Address section shows fields for Address status, Postcode, House no., House name, Address Line 1, and Address Line 2. The Account Alerts section is currently empty. Below these sections is a section titled 'Other Account Information' which includes fields for Account Category, Account SubCategory, Account Segment, Account SubSegment, Account team, Parent account, Stop Transactions via SMS, Quadplay ID, Do not archive, Email, User name, Primary contact, Gender, Alt phone no., Partner code, Service level, Armed Forces, Bankrupt, CAIS, Dispute, VIP, Goneaway, Recurring Topup, Priority Fault Repair, Collections, Town/City, and County. At the bottom, there is a section titled 'Account Manager' with fields for Managing Agent, Managing Agent Code, Managing Agent Team, and Care Team. The bottom navigation bar includes tabs for Account Summary, Contacts, Profiles, Age and ID Verification, Premise, Credit Vetting, Secondary DPA, Customer Summary, Credit Vetting Results, Orders, Agreements, Multi Device, Product / Services, Service Requests, Customer Comms, and Vital Information.

Example: Vodafone Contact Centre

Updated UI following process re-design :

The screenshot displays the Vodafone Contact Centre interface, which is divided into several sections:

- Customer Profile (Right):** Displays the customer's name (Mr. PUNIT BHATIA), status (Consumer), and account number (7020134740). It also shows a credit status (Credit vet manually overridden) and a basket icon.
- Activities (Middle):** A table listing recent activities, including orders, communications, and service requests. The table has columns for Date, Type, and Description.
- Product Search Overlay (Center):** A modal window titled "Search products or services" that allows users to search for products or services. It features tabs for "Pay monthly", "Pay as you go", "Voxi", and "Everything else". Below these tabs are icons for "Phone", "SIM only", "Tablet", "MBB", "HBB & Fixed", and "Combi bundle". The overlay also includes a "Search filters" section with an "Apply filters" button and a "Search results" section showing a list of products, such as "Apple iPhone XS 256GB silver".
- Left Sidebar:** Contains a "NBA offers" section with a "NO OFFER" message and an "Installed ID: 447955104422". Below this is a "DPA" section with a "Passed" status and a "Manual: Secondary DPA" label. It also includes a "Category" dropdown (Buy), a "Sub-Category" dropdown (New/Additional Nu), a "Resolution" dropdown (Information given), and a "Comments" text area.

At the bottom of the interface, there is a navigation bar with a "Mr. PUNIT BHATIA" profile icon, a "Consumer" status, and an "Active" status. The account number (7020134740) and the date (19/01/2016) are also displayed.

Example: Desjardins

Objective :

To provide an “at a glance” customer 360 whilst still leveraging Open UI

Desjardins UI was developed in conjunction with SI Partner Dymensions and presented at the Siebel Virtual Summit 2020. A replay of this Financial Services example is available at :
<https://go.oracle.com/OracleSiebelCRMVirtualSummit#sep22sep24>

The screenshot displays the Desjardins customer 360 interface. At the top, a navigation bar includes links for Home, Accounts, Business Projects, Opportunities, Call Reports, Activities, Dissatisfactions, and Potential needs. The main content area is divided into several sections:

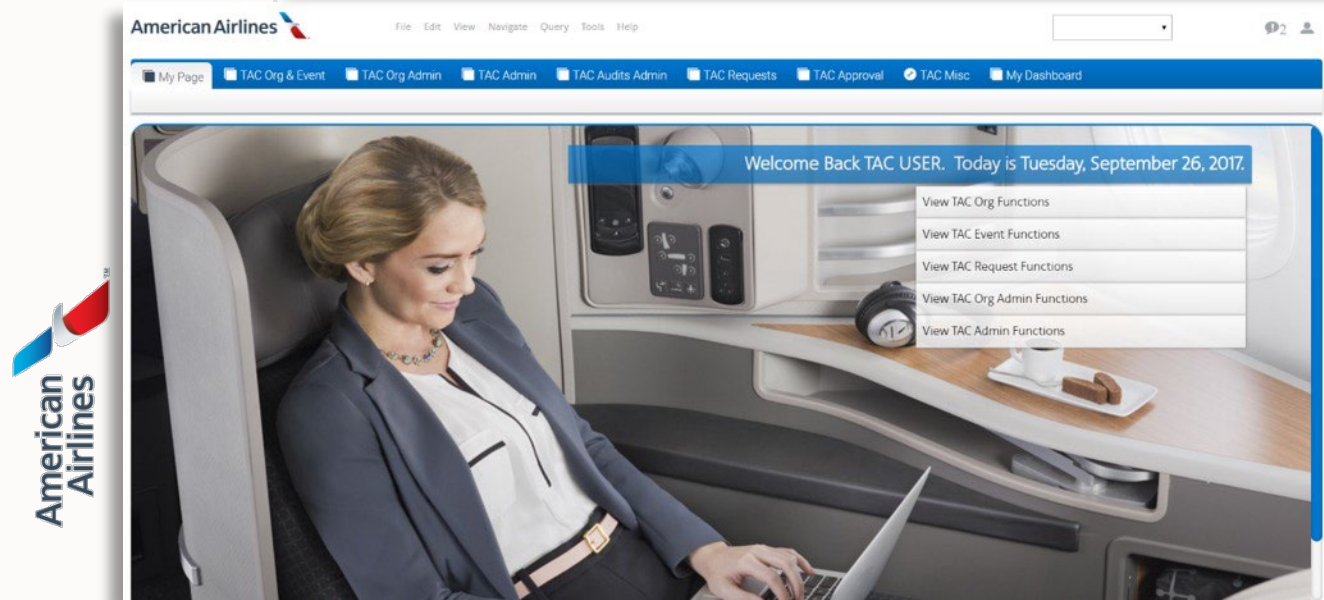
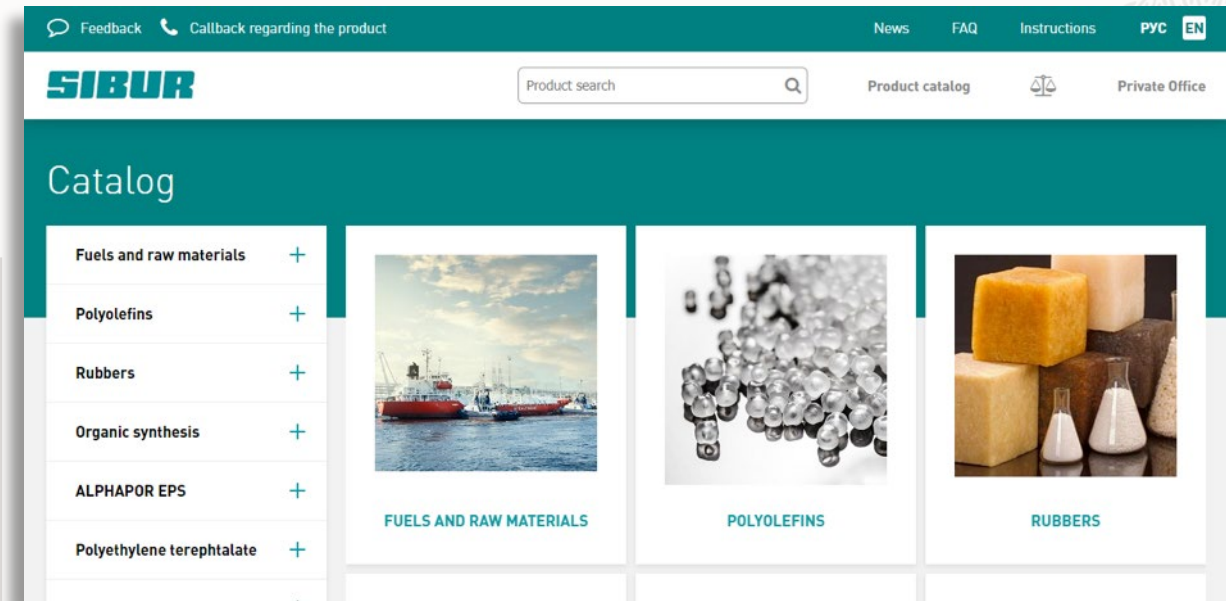
- CIE ADEL**: CIE ADEL PINETTE (VSB), 4 employees, 04/20/2011.
- Managers**: 815-20720 DirecteurDeCompte25, Folio: 815-20722-0035450, Internal client number: 666208200055.1956.
- Who is ANDRÉ ?**: Dreams and ambitions (Désir que sa compagnie devienne « La compagnie » d'entretien mé...), Interests and hobbies (Car), Spouse (Annie Roy), Children (Yes), Business continuity (Félix Fortin), Ownership (00190 - AFF - RENOUV - SCENARIO 00H, CIE ADEL), Last activity (08/28/2020 815-40910 Follow-Up), Personal projects (10/08/2020 Renovations).
- Understanding the business**: History and description (Monsieur Fortin est en affaire depuis plus de 15 ans Il a fondé...), Activity sector (448110 - MAGASINS DE VÊTEMENTS POUR HOMMES 100%), Business projects (09/30/2020 - Business Mergers/Acquisitions), Issues and concerns (09/23/2020 - Recruiting issues), Key events (Foundation date: 02/25/2011), Awards (08/18/2020 - Prix de reconnaissance dans l'industrie comme ...).
- The Business with Desjardins**: Upcoming activities (09/29/2020 - Face-to-face Meeting - 815-20720), Call reports (09/06/2020 - Face-to-face Meeting - 815-20720), Holdings (In relationship with 4 Desjardins organizations/divisions, Nb of Products Owned: 0, No operational credit: ✗, Desjardins Group Commitments: \$ 0).
- Meeting the needs of the Business**: Opportunities (Acheter une nouvelle bâtisse, Closure date: 11/28/2020, 2 - Preparation of the offer), Potential needs (Call back date: 09/30/2020 - Mise à niveau extérieur des immeubl...), Indicators (0, 1).

A central profile card for **ANDRÉ FORTIN** (100% Owner | Signatory) is also visible.

UX Examples : Web Portals

Siebel's web portals have also been updated to adopt the Open UI framework, supporting:

- Dealers
- Service & Breakdown partners
- End customers & fleet buyers





Siebel Mobile Phone UI

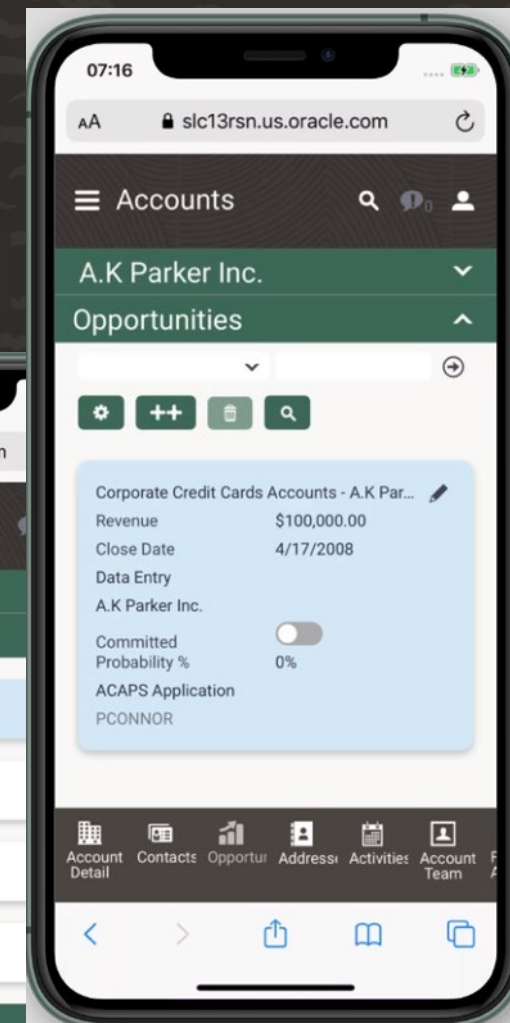
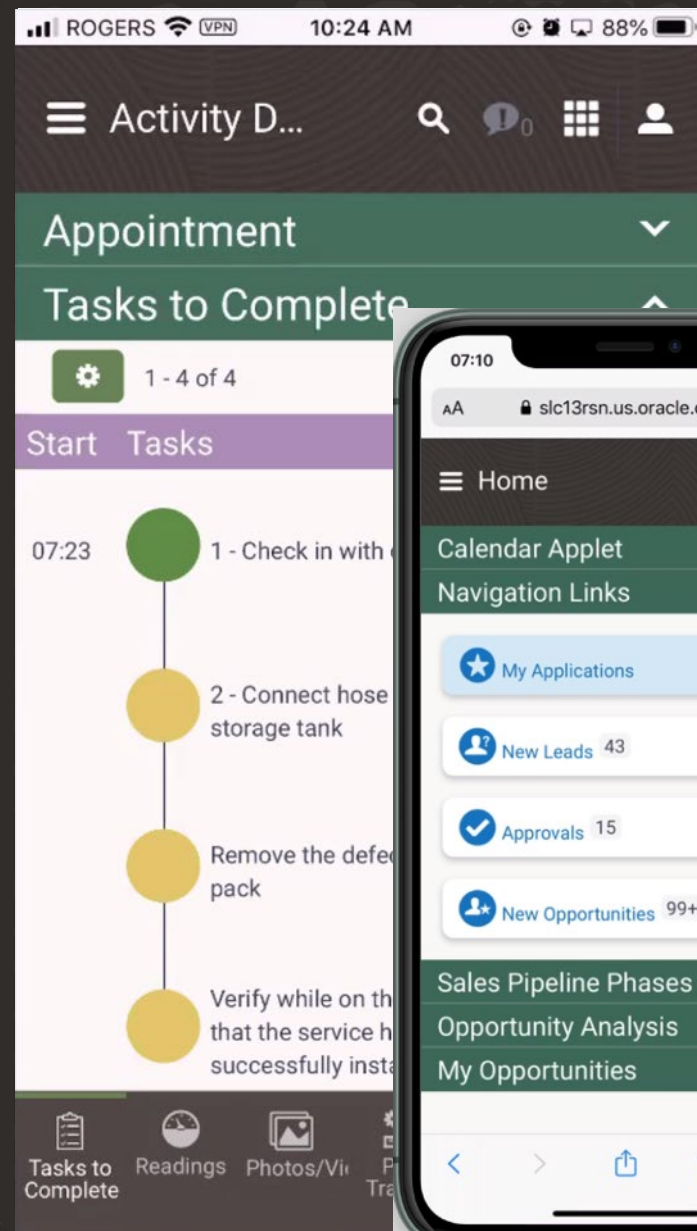
Ideal for sales and field service users, this enables customers to run their own Siebel application on a phone

Key features:

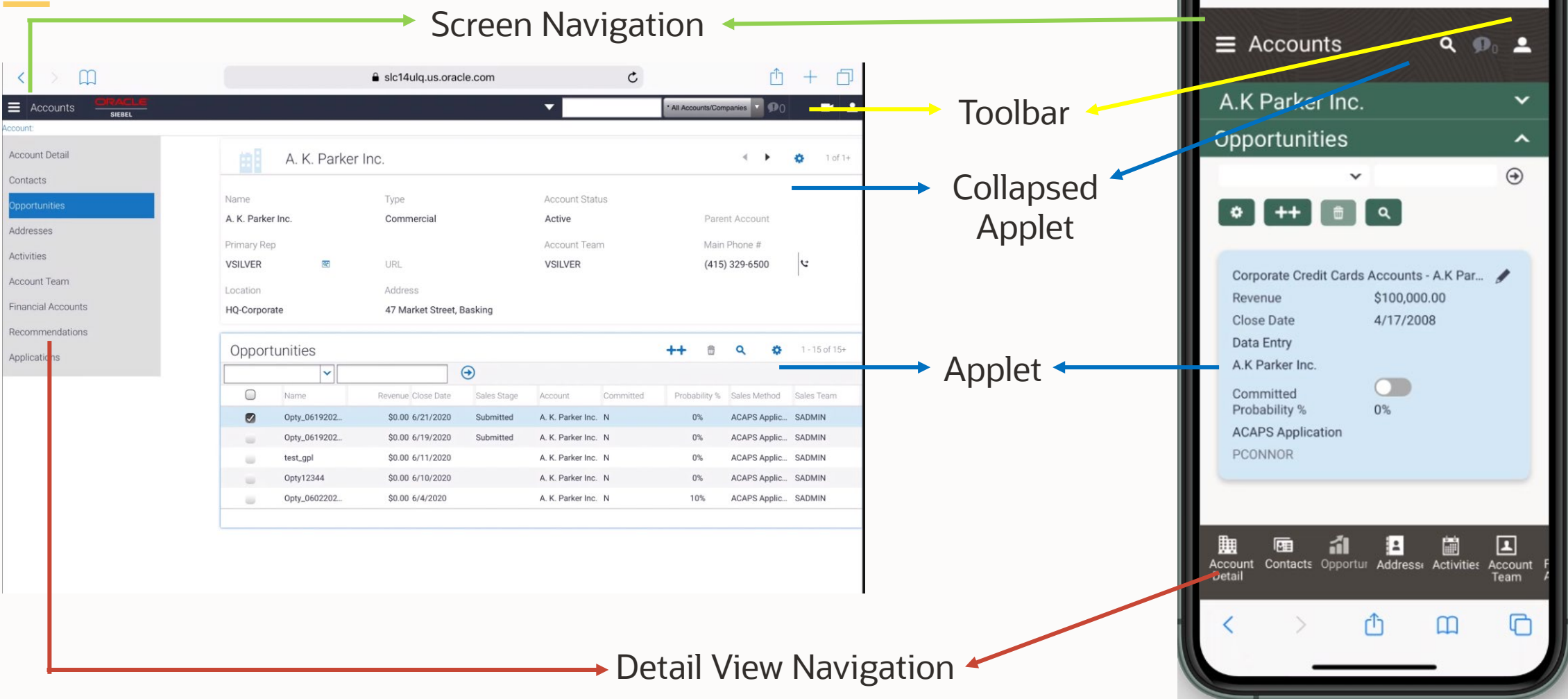
- Phone app UX is automatically generated from existing Siebel configuration and can be “fine-tuned” to complete the experience

- Available from Release 20.9 onwards

- No additional cost for connected, additional license required for offline use

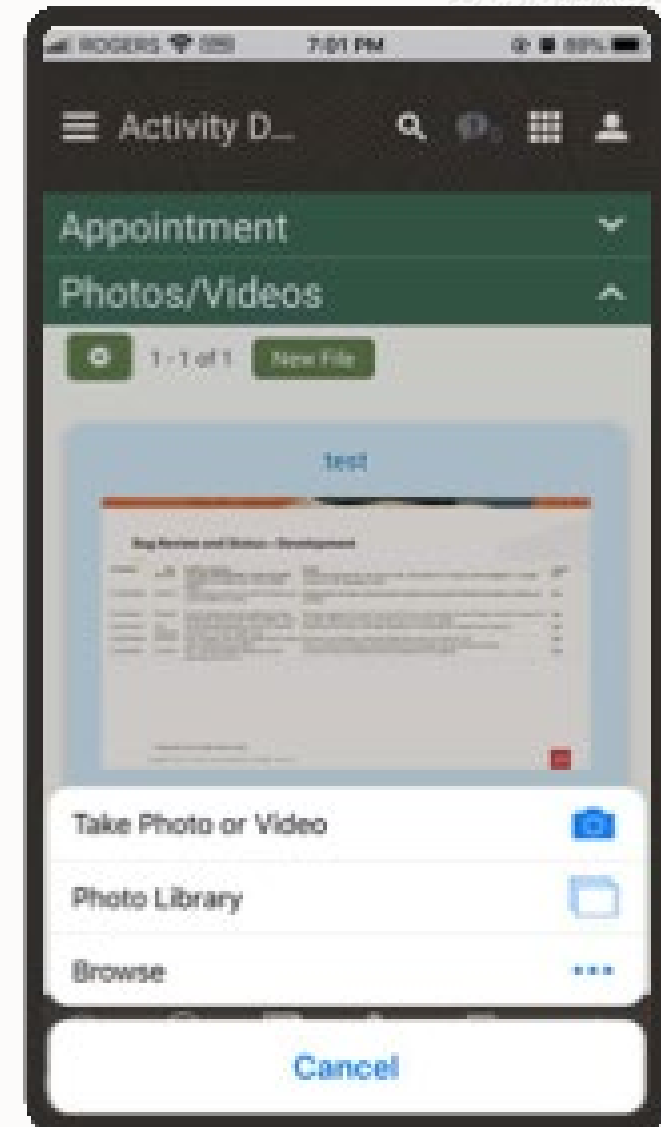


Siebel on a Phone – How it works



Mobile Application

- Hybrid mobile application for the latest iOS 15.x and Android 10.x and above
- Current Architecture - Oracle Mobile Application Framework v2.6.x
 - Migrating to React Native framework for the Hybrid container app
- Redesigned Responsive UI to support multiple mobile applications on Tablet and Smartphone
- Offline operation using SQLite storage and in-memory database
- Server Script Migration for execution on the Offline Client
- Industry App features - eDetailing, OIA integration etc





Data Visualisation : Industry Dashboards

At-a-glance view of key customer, account and other information

Rich combination of colourful analyses, graphics and reports

Available from Release 22.5 onwards, at no extra cost



Data Visualisation in Siebel

Organisations are looking for an intuitive approach to consuming aggregate data and insight. Dashboards support this without the need for additional business intelligence applications.

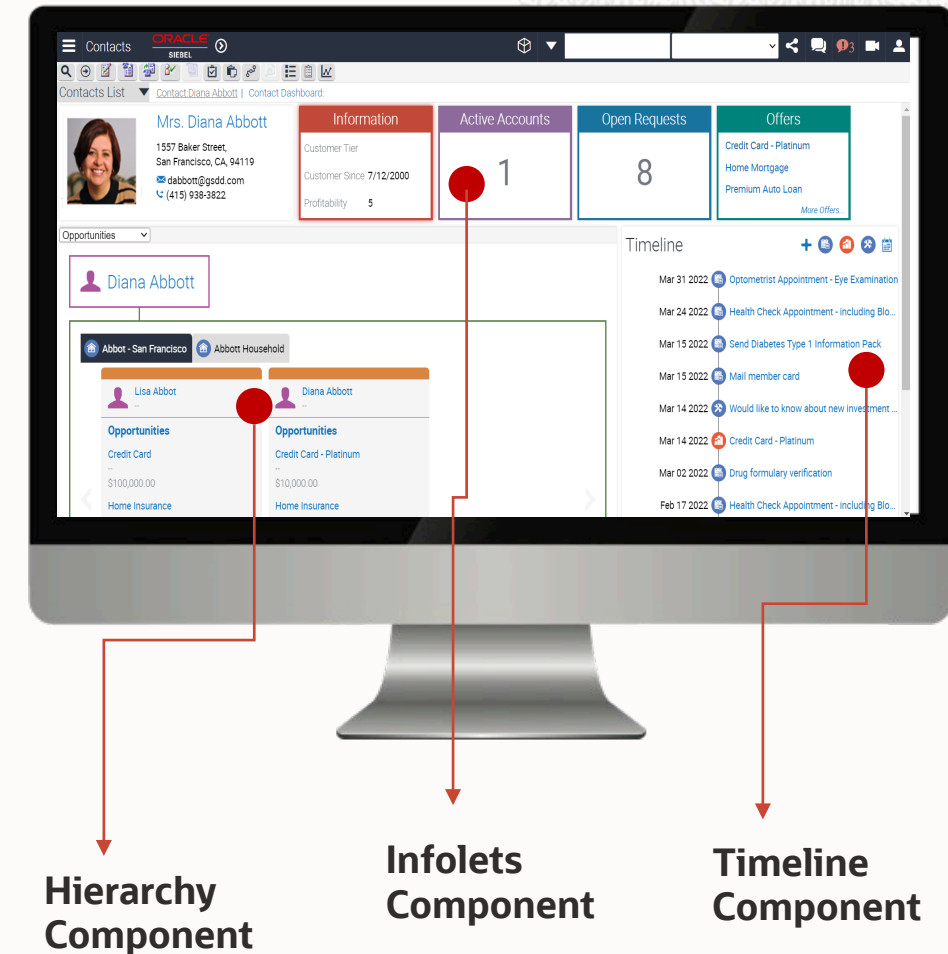
- The new dashboard functionality comprises the following:

1) New Data Visualization Components

- Infolets
- Timeline
- Hierarchy

2) Sample Industry Dashboards

- Financial Services
- Hitech and Manufacturing
- Telecom

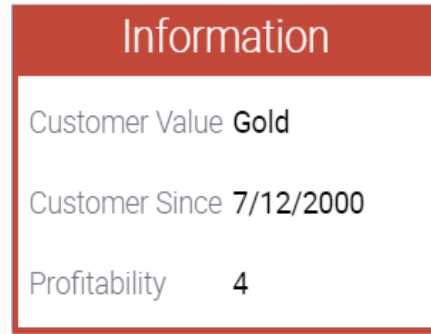


Infolets Component

- An Infolet is used to display a Title and associated display values
- Framework supports the ability to add\edit\delete Infolets in a dashboard
- There are 4 types of Infolets



Single BC field



Multiple BC fields



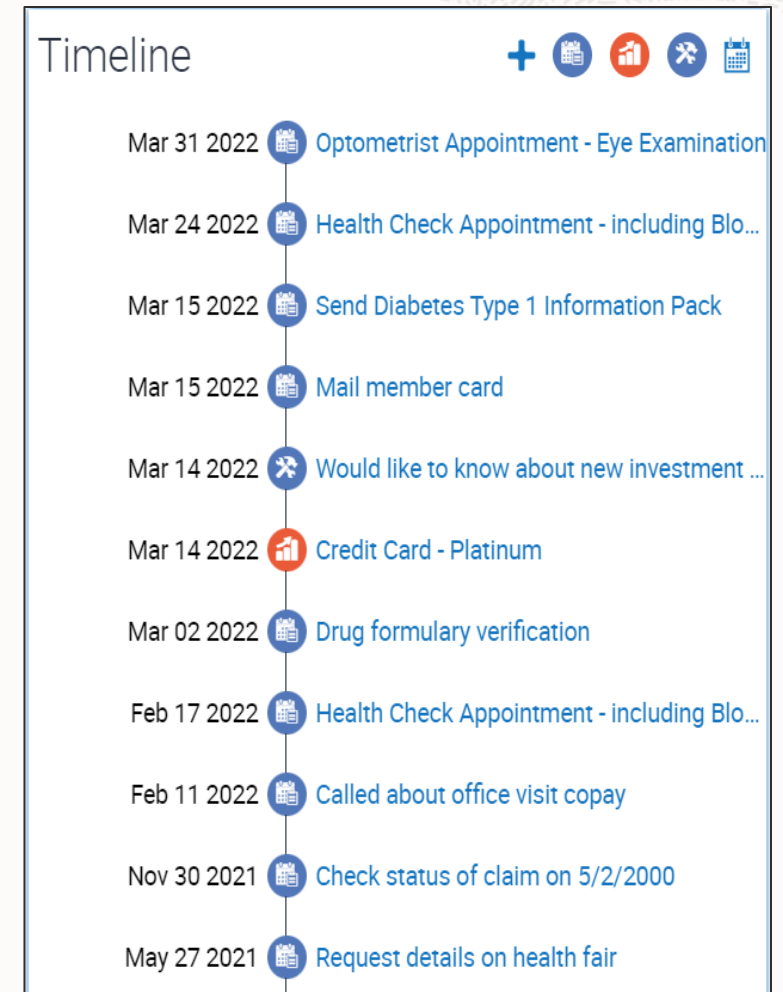
Aggregate Infolet



List Infolet

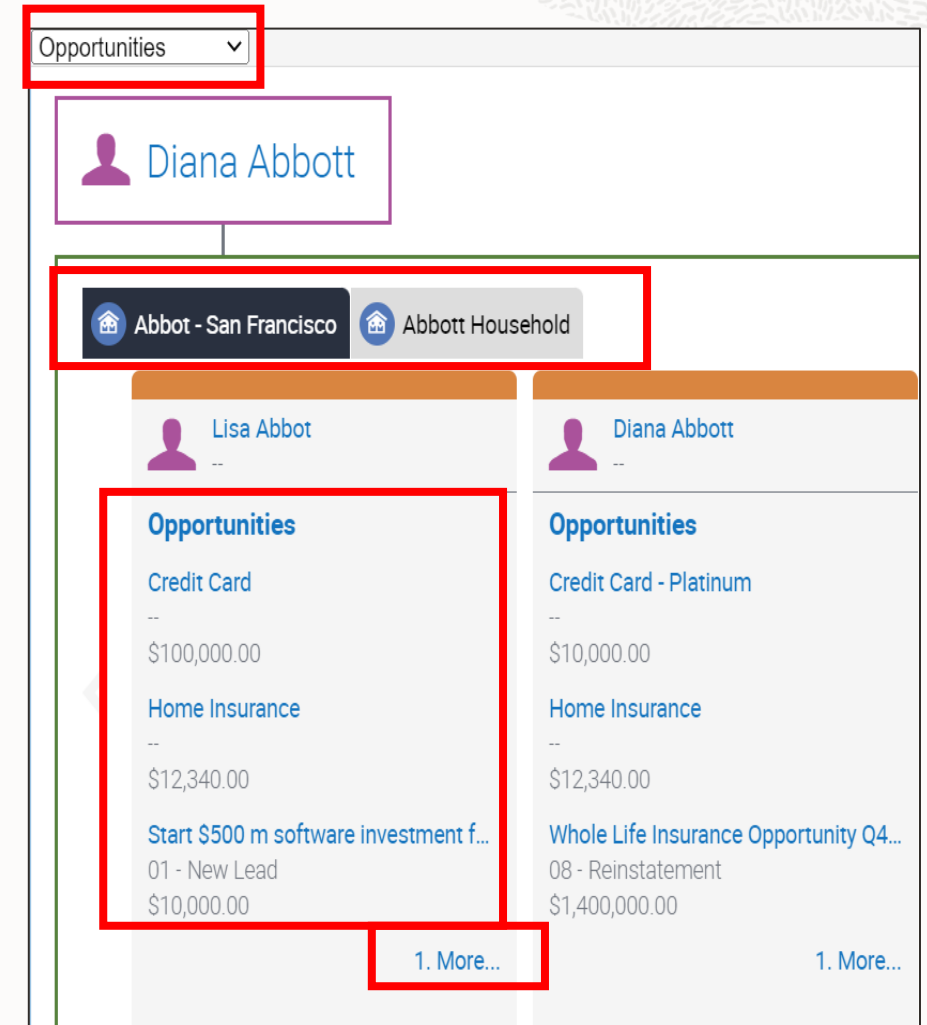
Timeline Component

- Timeline provides the ability to see the sequence of events
- Ability to display events from multiple entities
- Entity icons can be clicked as toggle buttons to make related data hide and unhide
- Option to add activities in the timeline by clicking the “+” icon
- Calendar icon can be used to filter events between a date range
- Scroll option can be used to navigate the records
- Framework supports the ability to add\edit\delete Timeline



Hierarchy Component

- Hierarchy component enables display of linked data in an ordered 4 level hierarchy.
- The hierarchy fields can be configured and displayed
- Hierarchy component is used to show various multiple associated entities in a single view
- There is a drop down to display the level 4 data
- In case no level 2 hierarchy data exists, the last level data gets displayed.
- User can scroll through the horizontal scroll bar to view more members in a household

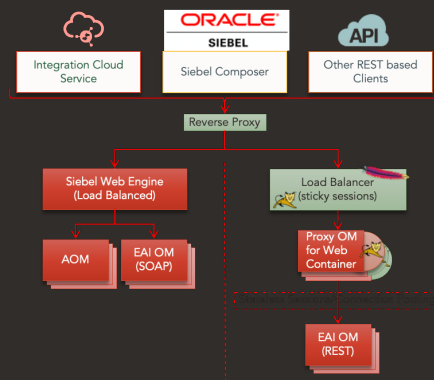


Siebel Integration and Services



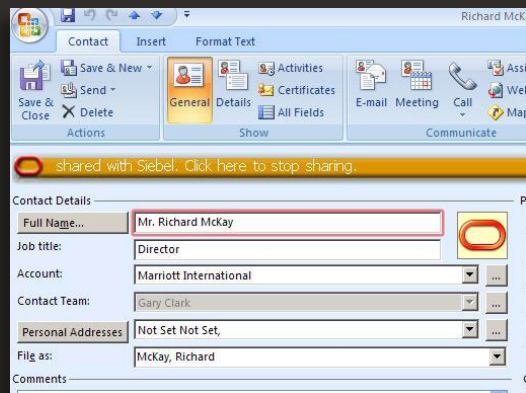
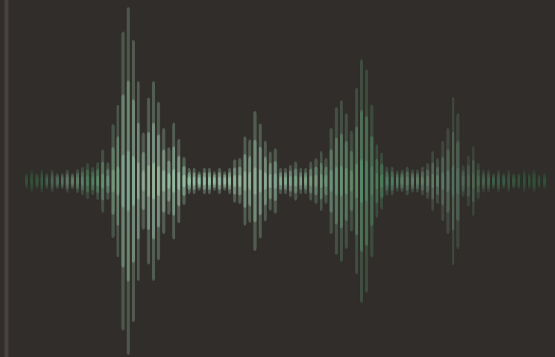
REST Integration

*Industry standard
real-time access to
data and processes*



Oracle OCI Artificial Intelligence Services

*AI analysis
and enrichment*



CRM Desktop

*Outlook integration
and synchronisation*

The person is allowed to enter the UK if	
Either	
Both	
The person is English and The person satisfies the English COVID rules	
OR	
Both	
The person is Scottish and The person satisfies the Scottish COVID rules	
The person is Scottish if	
The person's country of residence = "Scotland" and The person wears a kilt	
The person is English if	
The person's country of residence = "England" and The person eats fish and chips	
The person satisfies the Scottish COVID rules	
true	The person is double-jabbed and The last vaccination date was at least 2 weeks ago
true	The person has a negative PCR test
false	otherwise

Oracle Intelligent Advisor (Policy Automation)

*Natural language
business rules &
data capture*



Siebel CRM Desktop

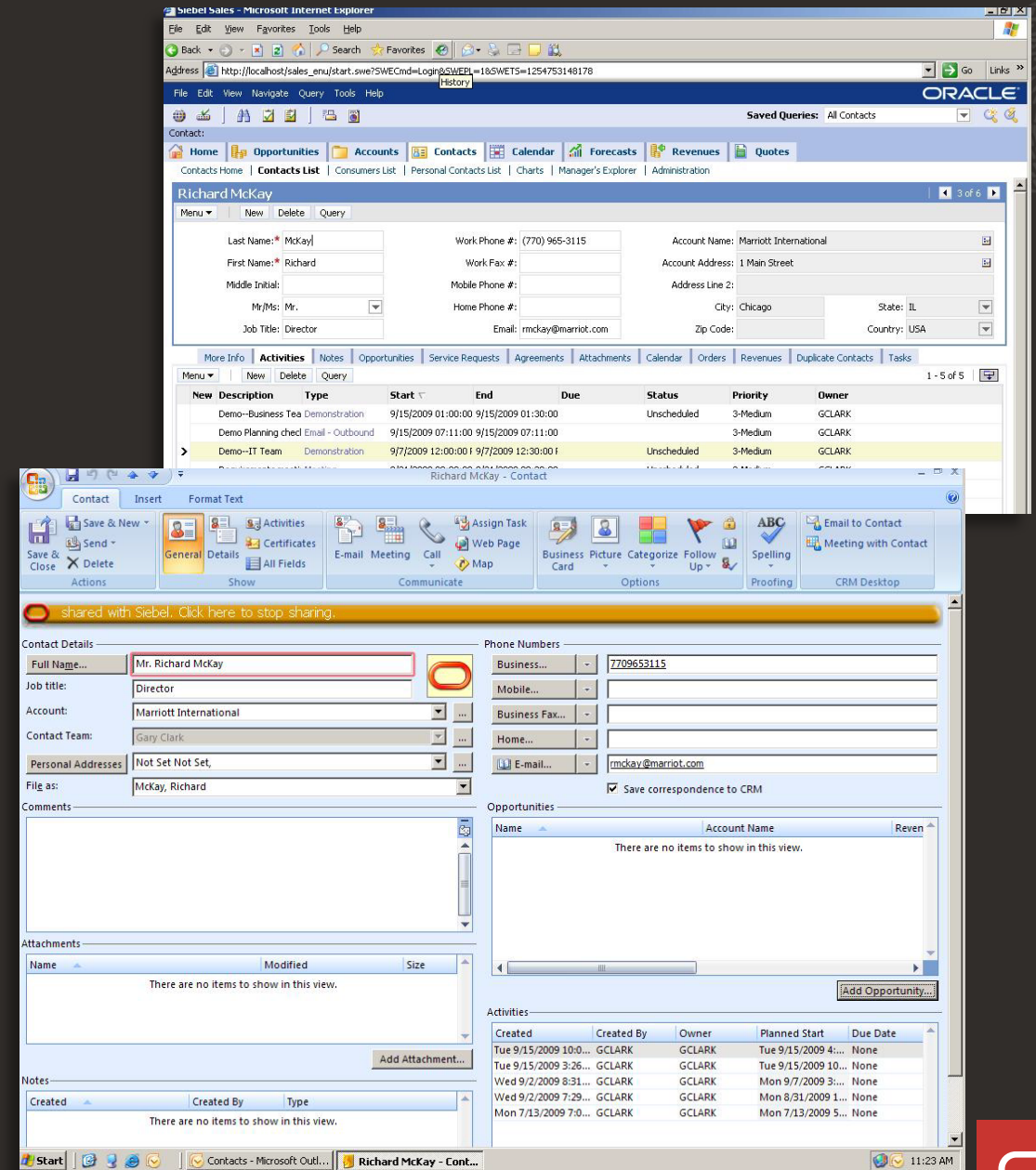
Corporations want 360° view of customers :

- Requires users to update and maintain CRM data in the corporate application
- Centralised record of customer meetings in CRM database
- All activities linked to end customers maintained centrally

However .. many users prefer to manage customer interactions and data in Microsoft Outlook

- Require ability to manage subset of CRM data to support day-to-day tasks
- Require ability to manage calendar, contacts, and email communication and relate it back to CRM data
- Require ability to keep shared calendar and contact data in sync between Microsoft Outlook and the CRM system
- Require ability to navigate to CRM system to do periodic advanced tasks

Siebel CRM Desktop bridges this gap



Oracle Intelligent Advisor (aka Policy Automation)

Intelligent Advisor is an intelligent, natural language, business rules engine.

- It was originally designed to interpret legal policy documents and to make decisions based on the policies – hence its original name: “Oracle Policy Automation” (OPA)
- It is capable of understanding the grammar of natural language and supports 19 languages out-of-the-box
- Intelligent Advisor is designed to allow business users to create and maintain their own business rules without the need to involve a developer
- The on-premise version of OIA can be sold by Applications Unlimited – however there are strict approval criteria for this version and corporate preference is to position SaaS

The person is allowed to enter the UK if

Either

Both

The person is English and
The person satisfies the English COVID rules

OR

Both

The person is Scottish and
The person satisfies the Scottish COVID rules


The person is Scottish if

The person's country of residence = "Scotland" and
The person wears a kilt

The person is English if


The person's country of residence = "England" and
The person eats fish and chips

The person satisfies the Scottish COVID rules	
true	The person is double-jabbed and The last vaccination date was at least 2 weeks ago
true	The person has a negative PCR test
false	otherwise

Country of Residence 

Country of Residence Next

What is the person's country of residence?

Scotland 

Does the person wear a kilt?

☒ Yes ☐ No

* Just Released * - Oracle OCI AI Services

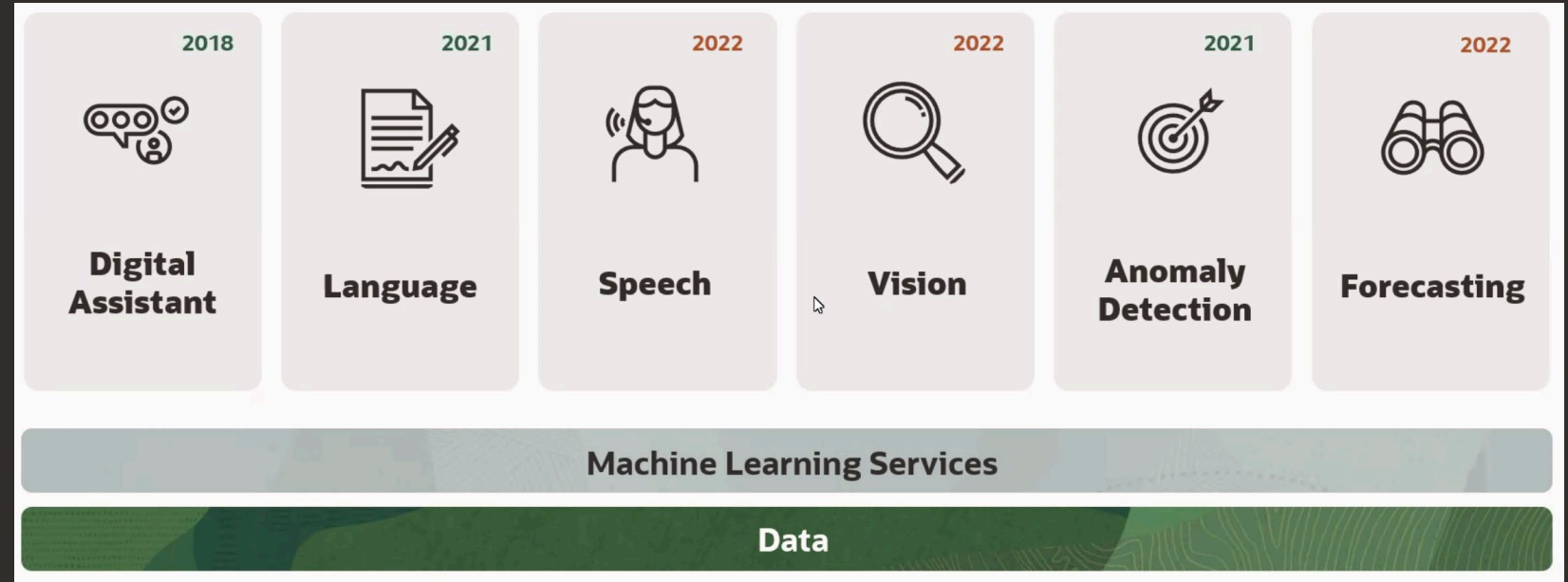


OOTB Product :

- Integration to Siebel
- Use cases for speech & language
- Suitable for both on-premise & OCI customers

Pre-requisites :

- Subscriptions to OCI AI Services and OCI Object Storage
- Must update to Siebel CRM 22.10 or later and upgrade repository

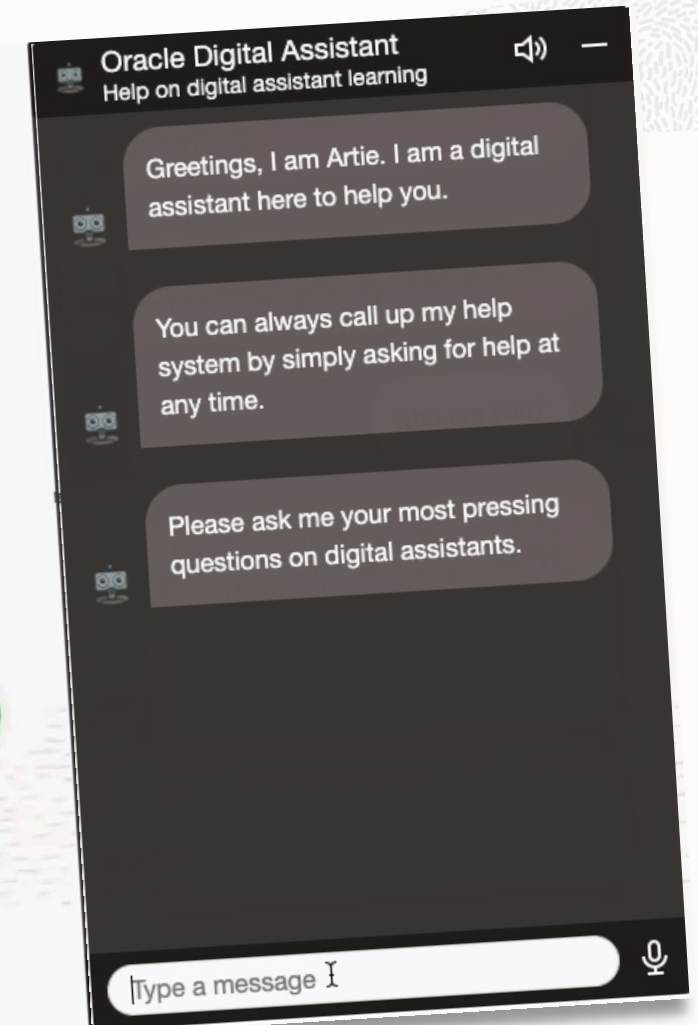


Digital Assistant

Platform to build intelligent chatbots
Intent Classification & Entity Extraction
Built in speech recognition
Business level insights into usage and adoption

Scenarios

- ✓ Customer support
- ✓ Human Resources frequently-asked-questions
- ✓ Improve customer facing website functionality discoverability through natural language



Language Analysis

Service

ORACLE

SIEBEL

Recording

Pretrained models trained on industry data to perform language analysis with no data science expertise needed

Detect the language of your text

Identify key phrases and entities in text

Classify text content into more than 600 categories and subcategories to support data analysis

Aspect-level sentiment analysis

In 2021, Oracle released the OCI Language service. It uses pre-trained machine learning models to make text analytics easy I love this AI service – it is great!

Language Detection	English (0.991)		
Named Entity Recognition	2021 [DATE] (0.9914)	Oracle [ORG] (0.9942)	
Sentiment Analysis	Oracle (Positive)	AI Service (Positive)	OCI Language service (Positive)
Key Phrase Extraction	OCI Language service (0.9710) text analytics (0.9710)	Pre-trained machine learning models (0.9710) AI service (0.9710) Oracle (0.9763)	
Text Classification	science and technology / computer science (0.9851)		



OCI Speech Service

- Automatically transcribe your audio and video files into text using advanced deep learning techniques.
- No data science expertise required
- Generate timestamped grammatically accurate transcriptions
- Present GA support is for 3 languages (English, Spanish, Portuguese)
- Text Normalization, Punctuations, Word Filtering, confidence score, etc.



Demonstrations

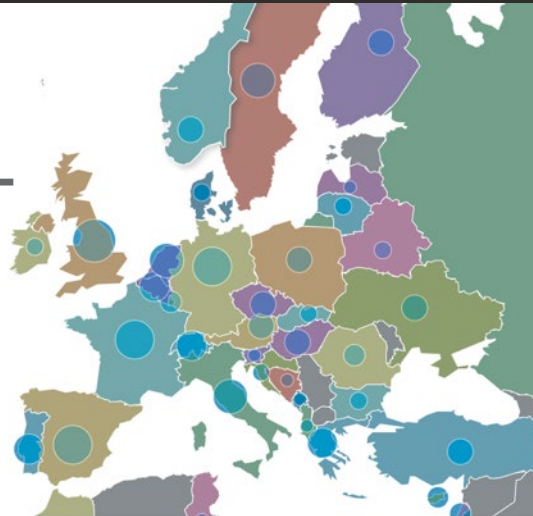
- OIA: [Basic](#) [Enhanced](#)
- Siebel Mobile
- Data Visualisation & Dashboards

Siebel CRM

Established Industry CRM with a Modern Cloud-Ready Microservice Architecture

400+

Siebel CRM customers across Western Europe



Modern CRM Platform



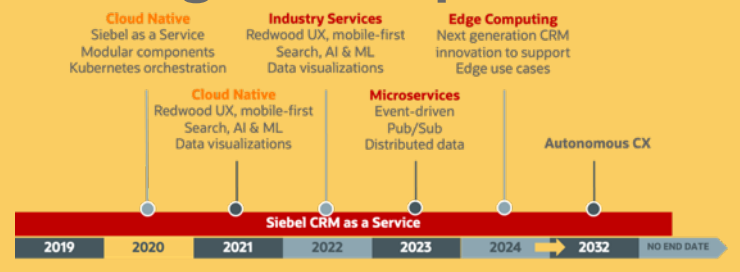
- Zero downtime
- Cloud-native (OCI), Docker containers
- Microservices, K8S orchestration
- Agile development – CI / CD, DevOps
- New responsive UI & themes
- Embedded automated testing
- Secure REST integration



22.x Benefits

- Premier Support to at least 2033
- Continuous Monthly Releases – no more complex & costly upgrades
- Retain existing integrations & configuration

Strong Roadmap



Siebel CRM

- Customer 360 – B2B and B2C
- Retail & Corporate Sales, Opportunity & Leads
- Needs analysis and applications
- Account and asset tracking, client service
- Wealth Management
- Insurance policies & claims, all LOBs
- Broker Portal, Agent Portal

Cross Industry Deployments



Thank You!

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blogs.oracle.com/siebelcrm