Why Oracle CRM is Better than Salesforce.com... if you do it right

Patrick Krause,

President, IT Convergence

Oracle CRM is Better than Salesforce.com.... If

- *You are an Oracle E-Business Suite end-user.*

- *You would like to be or already on Oracle for most business functions.*

- *Your sales people are employees.*

Session Goals

- *Understand the big picture of CRM*

- *Compare Salesforce versus Oracle CRM*

- *Solve the CRM challenge successfully*

- *Learn from real cases (ours included)*

Need a CRM system?

Needed a CRM system with enterprise-wide visibility

- ✓ From sales forecast to scheduled manufacturing
- ✓ Integration with Oracle ERP
- ✓ Multiple information that touches the customer is shared among several departments (Sales, Marketing, Finance, Manufacturing, Service, etc.)

ITC's CRM footprint over 10 Years

ACT!
by Sage

Extremely User Friendly

GoldMine.
Creating Customers for Life®

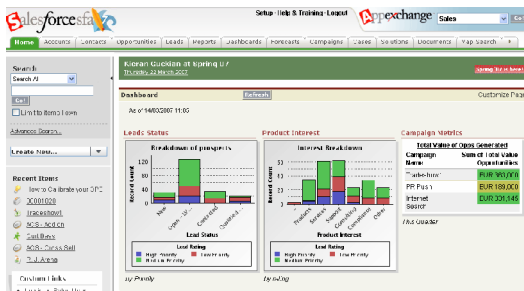E-mail integration so strong it became the sales' team's Inbox

PCRecruiter

Fantastic Visual Document Storage and search capabilities

Terminology

- Lead
- Opportunity
- Prospect, Customer, Party
- Booking or booked revenue
- Sales Contract
- Back log
- "Sale $" - sales person vs. finance
- Impact of discounts before or after the "sale"
- Impact of cancelled sales or returns

The Salesforce option

- **Our Sales Director pushed for Salesforce.com**
  - Apparent low costs per seat
  - Ease of deployment (Software as a Service model)
  - User friendliness
  - Reports that are visually stimulating

Sales force automation is not Customer Relationship Management (CRM)

- **90° Degree View of the Customer**

Manage Customer Relationships

When you get a call, start by searching Salesforce. You can quickly review the account and see who else at your company has been working with them. You can then use Salesforce to capture call notes and create a follow-up task if need be.

A Customer Calls
The customer may be calling you directly or they may have been transferred to you.

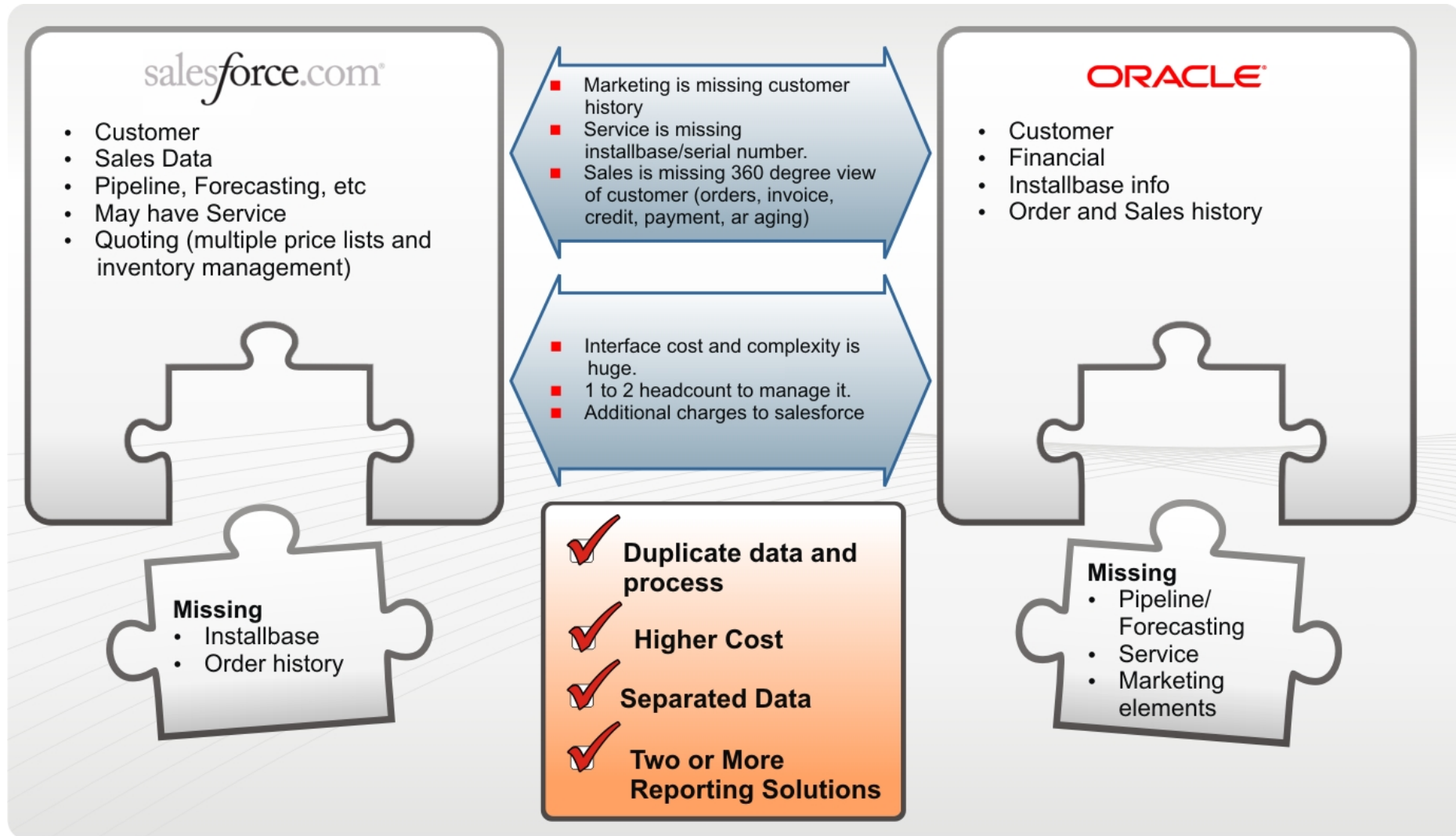**2 Search Salesforce**
The first thing you want to do is search Salesforce to see what information is available.

Gather Insight
By clicking on a contact or account, you can view all their activity history, outstanding follow-up items, and other pertinent information.

Update Information
Salesforce provides a place to log call notes, save important emails, and update information so everyone knows where things stand.

Assign Tasks
Often times you'll need to assign a follow-up task for yourself or someone else on your team.

Follow Up
Assigning tasks in Salesforce improves collaboration and creates true accountability.

Measure what's working
- A real-time view of your business
- A single solution for insight
- Customizable reports

The Salesforce option

- Going to force two or more reporting strategies:
  - One solution is vital for real business intelligence

- Data interface/integration expensive and difficult to maintain

- Cost is high annually
  - Forever
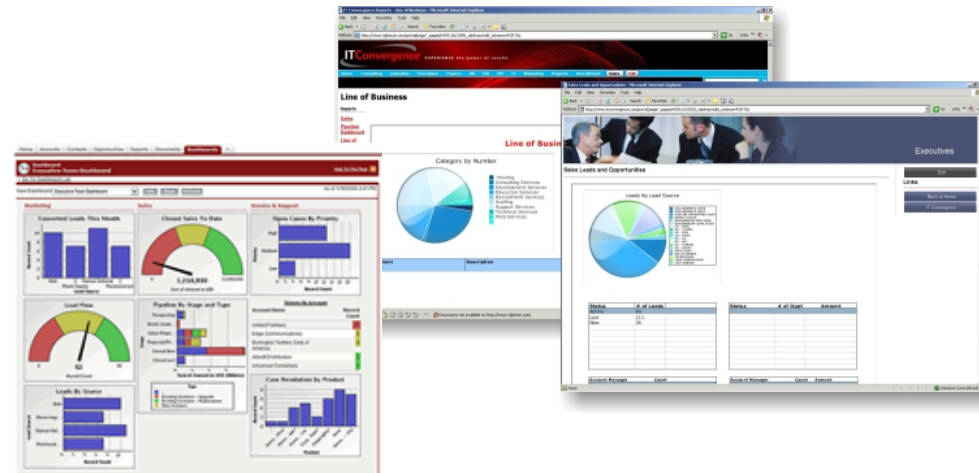
Information reconciliation is key

- How realistic is to have full integration between your Oracle ERP and SF?
  - Duplicated data
  - Difficult to maintain
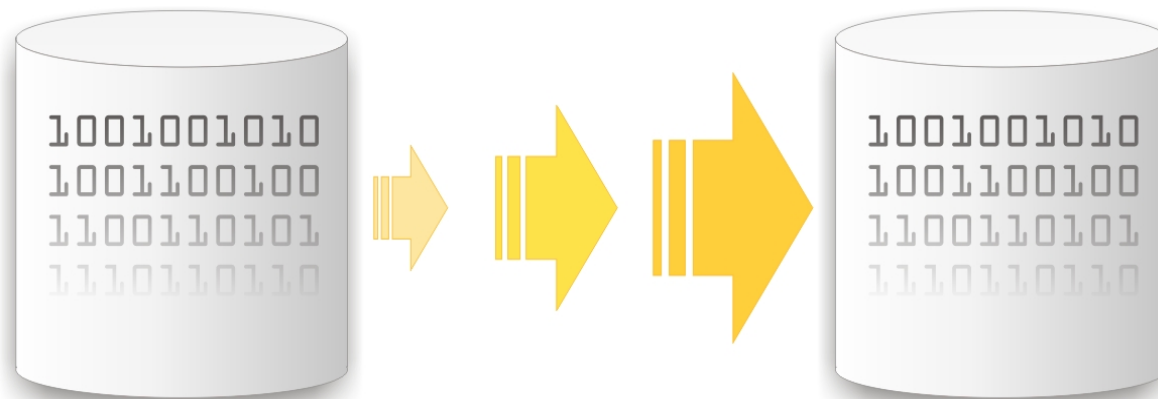
A Sales person's footprint

- ✓ Sales reps are employees (HRMS data)
- ✓ They make promises/value propositions to prospects and clients (Supply Chain/Inventory)
- ✓ They are commission based (Finance)
- ✓ They generate expenses meeting with clients, with approval limits (AP)
- ✓ Their sales success translates into bills to collect (AR)

All activities that generate different data points, that needed to be integrated and available enterprise-wide.

The Oracle CRM option

- The right tool for Oracle E-Business Suite users

- Oracle CRM integrates all elements in of the sales footprint

- Detailed, dynamic sales funnel management

Lead

Opportunity

Quote

Order

Invoice

Collect

Solid, true CRM system

- 360^0 Degree View of the Customer

Oracle CRM provides

- Sales forecasting

- Product forecasting

- Order/Bookings

- Booking

- AR Aging

- Gross Margin
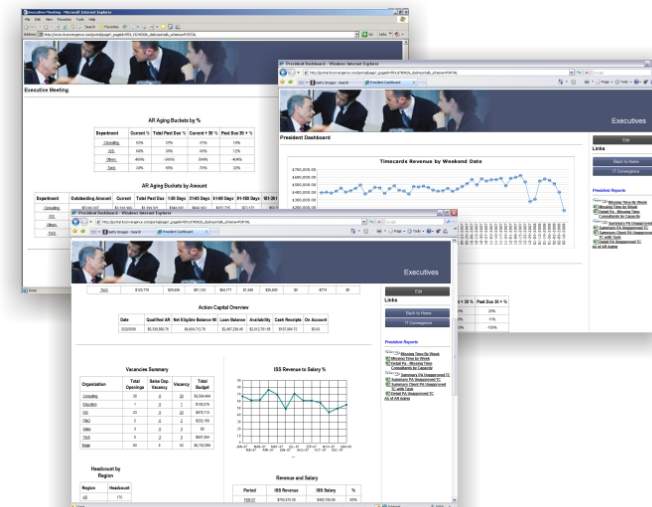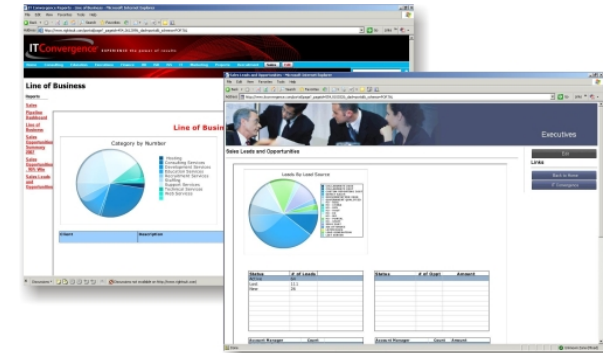
Reporting Comparative Analysis

salesforce.com®

ORACLE®

- Generic sales forecasting
- Forecasts not integrated with supply chain/inventory

- Access to other company users, other than Sales?

- Dynamic Pipeline predictions directly integrated with revenue forecasts
- Forecasting integrated with supply chain, manufacturing
- Gross margin analysis

✓ Jumpstart implementation
✓ Access to all E-Business Suite users

Cost Comparison

salesforce.com®

ORACLE®

- Low initial buy-in
- Shorter (cheaper) initial deployment
- Higher cost of Ownership
- Outrageous Data storage cost

- Need to buy additional licenses for sales staff
- Longer initial deployment
- Licensing
- Easier to maintain

Client's cases

National Fast Food Chain

Medical Devices Manufacturer

Wide Area Data Services (WDS) Provider

And our own Oracle CRM at **IT**Convergence

EXPERIENCE the power of results

The Immutable Laws of Using CRM

- If its not in CRM, it didn't happen
- Everyone in the company uses CRM
- Every significant client interaction is documented in Telesales
- If you're certain that it happened, but didn't document it refer to rule #1

Oracle CRM provides One Source of Truth

- ## Oracle gives you one solution:
    - ✓ Avoid data duplication
    - ✓ True Business Intelligence
    - ✓ Lower long-term total cost of ownership
    - ✓ Company wide visibility

- ## Careful choice between Oracle Telesales, Sales online, and Oracle Sales
    - ✓ Integration with service (Oracle Teleservice)

Q&A

Reporting with CRM

Reporting with CRM

Line of Business - Consulting Services

Category by Number

- Hosting
- Consulting Services
- Development Services
- Education Services
- Near Shore
- Staffing
- Support Services
- Technical Services
- Web Services
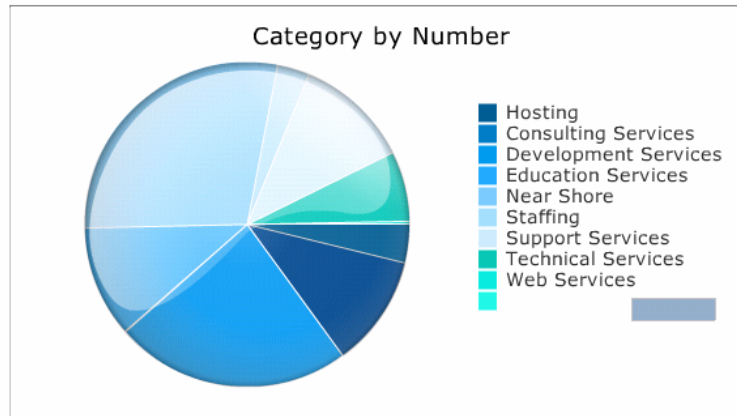
Field	Value
Opportunity Number	8986
Opportunity Name	Mc Lawerson
Source Code	
Satus	New Opportunity
Sales Channel	DIRECT
Close Date	39132
Sub Total	$25,928
Primary Contact	Bob
Sales Stage	Sales Stage
Win Probability	100
Account Manager	Bob Baker
Job Title	Global HR Lead
Roles	

Client	Description	Account Manager	Win Probability	Close Date	Total Amount
Mc Lawerson	HR Germany	Bob Baker	100	39132	19125
Then	ISS Support	Miller Joh	100	39132	9500
Turtle Factor	Eaton Training Project	Feebie X	100	39125	40000
Development Suite X	MFG Lead - Sushil	Yammy Tami	100	39125	12750
File Nine by Trouble	(T) Development	Philio Wong	100	39122	600
Loraine Bob Barket	Mexico Support	Then Turle	99	39160	1600
Turtle Factor	Tech. Training Pilot	Philio Wong	99	39146	1050
Development Suite X	10g New Features for Developers	Then Turle	99	39142	2100
File Nine by Trouble	Migration to 11.5.10	Miller Joh	99	39141	3184
Nine East Incoporation	(F) Manufacturing	Feebie X	99	39129	280

Product Category	Description	UOM	Qty	Sub Total	Forecast Date
Consulting Services	Oracle Manufacturing	EA	1	227500	2/12/
Consulting Services	Oracle Human Resources	EA	1	46292	2/19/
Consulting Services				31840	2/28/
Consulting Services	Oracle Research Information			13945	2/9/
Consulting Services	Oracle Reporting Tool	EA	1	46292	2/19/
Consulting Services	Oracle Human Resources	EA	1	46292	2/19/

Full Name	Sales Group	Role	Job Title
Miller Joh	TGR	Business Research Group	THEO.The Group Research
Miller Joh	TGR	Business Research Group	THEO.The Group Research
Miller Joh	TGR	Business Research Group	THEO.The Group Research
Miller Joh	TGR	Business Research Group	THEO.The Group Research
Miller Joh	TGR	Business Research Group	THEO.The Group Research

Reporting with CRM

Line of Business - Hosting

Category by Number

Legend:
- Hosting
- Consulting Services
- Development Services
- Education Services
- Near Shore
- Staffing
- Support Services
- Technical Services
- Web Services
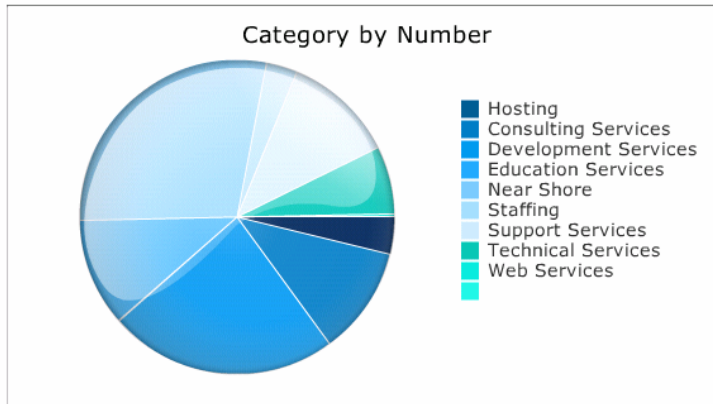
Field	Value
Opportunity Number	8986
Opportunity Name	Philip Salary
Source Code	
Satus	New Opportunity
Sales Channel	DIRECT
Close Date	39263
Sub Total	$125,928
Primary Contact	Tilly Norris
Sales Stage	Sales Stage
Win Probability	100
Account Manager	Bob Baker
Job Title	Global HR Lead
Roles	

Client	Description	Account Manager	Win Probability	Close Date	Total Amount
File Nine by Trouble	(T) Development	Philio Wong	100	39122	600
Loraine Bob Barket	Mexico Support	Then Turle	99	39160	1600
Turtle Factor	Tech. Training Pilot	Philio Wong	99	39146	1050
Development Suite X	10g New Features for Developers	Then Turle	99	39142	2100

Product Category	Description	UOM	Qty	Sub Total	Forecast Date
Hosting	Oracle Manufacturing	EA	1	227500	2/12/
Hosting	Oracle Human Resources	EA	1	46292	2/19/
Hosting				31840	2/28/

Full Name	Sales Group	Role	Job Title
Bob Barket	TGR	IT Studies	IT.Internal Services
Tilly John	TGR	IT Studies	IT.Internal Services

Reporting with CRM

Leads by Source

- Collaboration
- Custrom Reporting
- Web Services
- Government
- Leads Generation
- Internal Support
- Information IT
- Marketing Distribuation
- Portal Maintainance
- ISS
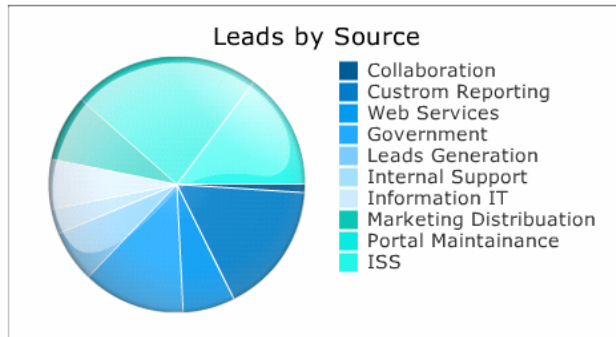
Status	# of Leads	
Active	3	
Converted to Opportunity	45	
Lost	6	
New	7	

Status	# of Oppt	Amount
Active	30	$529,200

Account Manager	# of Leads	
Jacob Juror	4	
Bob Miller	12	
Jason Bill	12	
Mark Shiea	25	
Julie Kume	24	
Micheal Jc	11	
Yoga Yhen	48	
Fred Chen	26	
Yammy Tami	27	
Wayham Sheiana	43	

Account Manager		
Jacbo Juror	12	$334,985
Bob Miller	7	$210,345
Yammy Tami	3	$53,295

Reporting with CRM

Sales Booking Weekly - 2007
Trailing 13 Week Average

● Actual ◇ 13 Week Average ★ Target
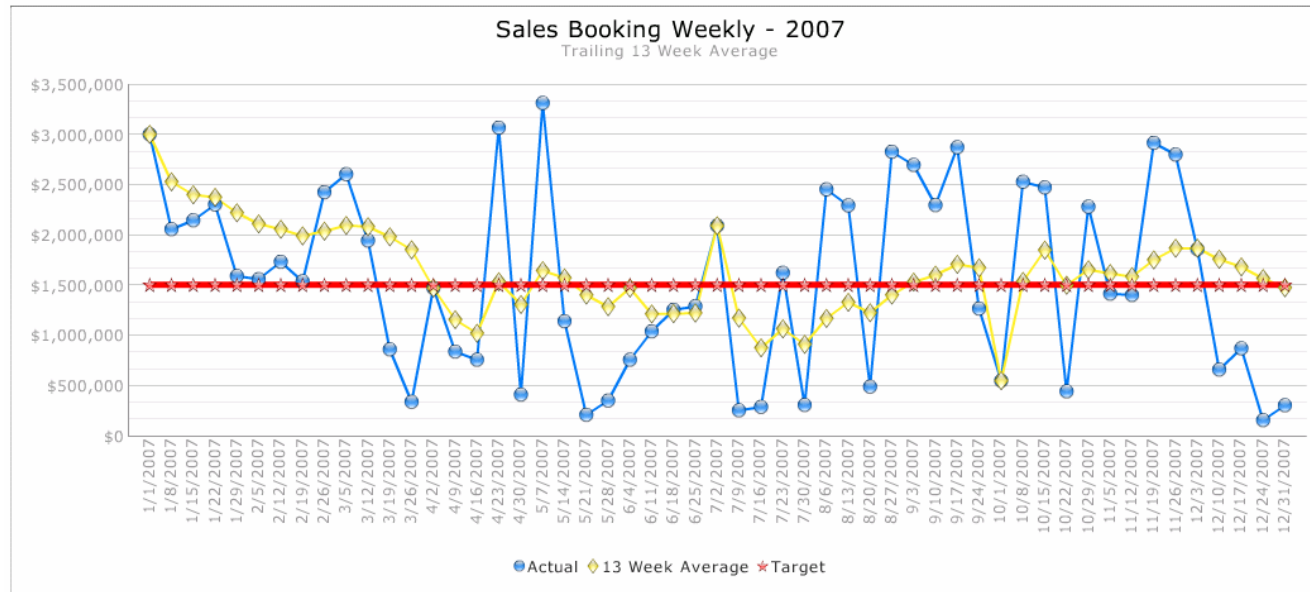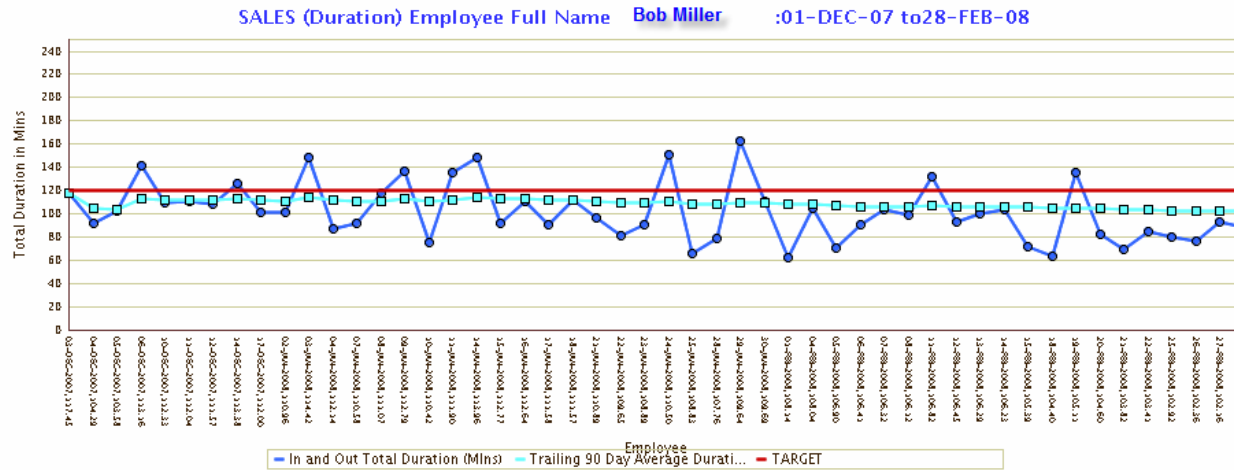
Week Ending	Client	Oppor Number	Product Category	Description	Account Manager	Win Probability	Status	Close Date	Total Amount
1/22/2007	Boson CN	7528	Support Services	10g Upgrade	Jacob Juror	100	Won	2/2/2007	$124,500
1/22/2007	Mobile Food Service	2512	Staffing	FA Expert	Bob Miller	100	Won	2/5/2007	$21,000
1/22/2007	Gold Main Tucker	7084	Consulting	(T) HR Analyst	Jason Bill	100	Won	2/4/2007	$64,000
1/22/2007	Tucker's Ice-Cream	7263	Staffing	Support 2	Mark Shiea	100	Won	2/5/2007	$105,400
1/22/2007	Man of the Century	7063	Web Support	Remote Development	Julie Kume	100	Won	2/11/2007	$72,000
1/22/2007	File Man Bob	7187	Staffing	10g Upgrade	Micheal Jc	99	Won	2/4/2007	$93,900
1/22/2007	Yahoo General Tab	2344	Web Support	FA Expert	Jacob Juror	100	Won	2/5/2007	$229,320
1/22/2007	Samsun Incorporation	2144	Staffing	(T) HR Analyst	Bob Miller	100	Won	2/4/2007	$114,000
1/22/2007	Mc Donalds Sweet	3255	Support Services	HRMS Phase 3	Jason Bill			2/5/2007	$114,000
1/22/2007	Boson CN	2241	Staffing	Support Services	Mark Shiea	100	Won	2/2/2007	$114,000
1/22/2007	Mobile Food Service	3252	Staffing	FA Expert	Julie Kume	100	Won	2/5/2007	$21,000
1/22/2007	Gold Main Tucker	254	Support Services	(T) HR Analyst	Micheal Jc	100	Won	2/11/2007	$64,000
1/22/2007	Tucker's Ice-Cream	848	Staffing	HRMS Phase 3	Yoga Yhen	100	Won	2/4/2007	$105,400
1/22/2007	Man of the Century	2526	Consulting	Support Services	Jacob Juror	100	Won	2/5/2007	$72,000
1/22/2007	File Man Bob	2753	Staffing	FA Expert	Bob Miller	99	Won	2/11/2007	$93,900
1/22/2007	Yahoo General Tab	6963	Support Services	(T) HR Analyst	Jason Bill	100	Won	2/1/2007	$229,320
1/22/2007	Samsun Incorporation	3664	Staffing	HRMS Phase 3	Mark Shiea	100	Won	2/4/2007	$114,000
1/22/2007	Mc Donalds Sweet	3684	Consulting	Support Services	Julie Kume			2/5/2007	$114,000
1/22/2007	Boson CN	3362	Staffing	Staffing	Micheal Jc	100	Won	2/11/2007	$124,500

Reporting with CRM

Reporting with CRM