



An Oracle White Paper  
February 2012

# Rethinking CRM: Drive Greater Sales Productivity with Oracle Fusion CRM

## Disclaimer

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

Executive Overview.....	1
Introduction .....	1
Optimizing Sales Performance Management.....	3
What Today's Sales Organizations Need from CRM .....	3
How Oracle Fusion CRM Meets the Needs of Today's Sales Organizations .....	4
Make your sales reps more effective .....	4
Get more quality opportunities by increasing sales efficiency .....	7
Ensure rapid user adoption .....	8
Conclusion .....	10

## Executive Overview

Sales organizations often resist change, especially when it distracts them and slows down the selling process. Oracle has invested more than six years of in-depth research, conducting extensive interviews with more than 1,000 global customers to understand their needs. Coupling research findings with current market trends, Oracle has designed a new generation of CRM products called Oracle Fusion Customer Relationship Management. Oracle Fusion CRM is specifically designed to help selling organizations improve effectiveness and efficiency to drive more revenue. Oracle Fusion CRM is built on a completely new, open, and standards-based architecture. And Oracle Fusion CRM products were built with ease of use in mind. Each application guides sales professionals to execute on the most optimal actions during the course of their work day. And they're designed to work how they work—in Microsoft Outlook, on the Web, or on their smartphone. Oracle Fusion CRM coexists with other new Oracle Fusion Applications solutions for Human Capital Management, Supply Chain Management, Project Portfolio Management, Procurement, and more.

This white paper is designed to provide deeper insight into Oracle's Fusion CRM solution, and provide specific decision criteria to help determine whether this solution is the right fit for your sales organization.

## Introduction

Today's economic climate has changed the way businesses sell to other businesses. According to CSO Insights, win rates for typical B2B sales opportunities decreased to approximately 45 percent in 2011. This means sales reps must work much harder overall for every deal they win. Although external conditions have improved in the last year, tighter spending budgets and a more cautious customer base still present challenges.

Internally, sales executives are faced with the never-ending need to increase revenue with the same or fewer resources. Traditionally, raising quota and increasing headcount have been the solution businesses use to increase sales. However, with shareholders and CEOs focused on

reducing costs as a means to maintain profitability, sales executives can no longer rely on traditional methods, and instead they must focus on how they can do more with less.

This means businesses must re-evaluate how they sell. Organizations realize they can only raise quota to a certain extent and therefore must increase both sales effectiveness and efficiency. The focus should include more than simply getting more deals. It must also encompass generating higher-quality leads that convert to sales. To achieve this, the CRM applications that sales and marketing organizations use must optimize sales performance management and increase team productivity.

## Optimizing Sales Performance Management

Some of the discrepancies between top and bottom sales performers may be attributed to natural selling abilities; however, it is also true that some reps are faced with an uphill battle. There may be suboptimal distribution of leads, poor lead quality, and a limited number of practical tools to help these reps achieve success.

Optimizing sales performance management leverages the best practices of star performers and gives sales reps the tools they need to win more deals. However, in order to increase sales performance, sales executives must first focus on improving sales effectiveness to achieve higher win rates. They must then seek to increase sales efficiency to ensure that more quality opportunities are available.

Optimizing sales performance involves three key areas:

- Conducting better sales planning to address sales process inefficiencies
- Generating higher-quality leads
- Gaining more-relevant insight to drive increased sales and address potential issues within a region, team, individual, and/or opportunity

Sales organizations want a higher percentage of sales reps achieving quota. When more reps consistently hit their sales targets, the organization meets its sales goals more predictably. To achieve this, win rates must increase. So, how does a sales rep know which opportunity to pursue? By targeting opportunities that are most likely to close based on the prospect's profile, sales reps can win more deals, achieve quota faster, and help the organization meet sales goals.

The goal of marketing and lead generation is not simply to generate more leads regardless of quality, but rather to identify a larger number of higher-quality leads that have the greatest likelihood of converting to sales.

### What Today's Sales Organizations Need from CRM

Sales executives need to improve the performance of the overall sales organization so that every single sales rep is equipped to succeed. To support this goal, organizations need a CRM solution that meets the following criteria:

- **CRM needs to help your sales reps be more effective.** Sales professionals need to know their customers better, collaborate more effectively, and gain insight into identifying and targeting the right opportunities.
- **CRM needs to help your sales organization be more efficient.** Sales reps need to be able to complete everyday tasks faster and act more quickly on quality leads. They

also need the right territories, quotas, and incentive compensation so that they are aligned with sales goals.

- **CRM needs to help organizations realize the value of CRM faster.** CRM solutions must be easy to use, easy to configure, and easy to deploy.

## How Oracle Fusion CRM Meets the Needs of Today's Sales Organizations

Oracle developed Oracle Fusion Customer Relationship Management to address the specific challenges of sales organizations. By incorporating embedded best practices, gleaned from years of experience working with customers of Oracle's world-class CRM portfolio, Oracle Fusion CRM is the industry's most modern, standards-based, scalable, and extensible technology platform.

### Get Faster Value Out of CRM

Whether investing in a software-as-a-service (SaaS) model or an on-premise deployment, sales executives want instant results from their investment. Oracle designed Oracle Fusion CRM to meet that need. It is easy for sales professionals to use, easy to modify to meet changing business demands, and easy to deploy. And for SaaS deployments, Oracle Fusion CRM is a premier offering within the Oracle Cloud, providing an integrated suite of application, middleware, and database services that no other technology provider can match.

### Make your sales reps more effective

Oracle Fusion CRM helps sales reps become more effective and achieve higher win rates through its embedded business intelligence and social networking features.

### Know your customers better

If a sales rep wanted to conduct research on a prospect, she would have to look through various front- and back-office enterprise applications, as well as through external data sources and social networking tools. Oracle Fusion CRM's Customer Center is unique in that it incorporates comprehensive customer information into a single location. By centralizing information in one place, sales reps can gather data quickly within the context of their activities, such as leads they're trying to progress. Because Customer Center provides comprehensive customer detail from both internal and external sources, the most relevant information is only a click away. Customer Center also provides recommendations on the next-best product to sell for each customer, maximizing upsell and cross-sell opportunities.

### Maximize success by leveraging social networking

In the past, deals were made based on personal connections and information was maintained between the involved parties. It took time to nurture these connections. With the advent of

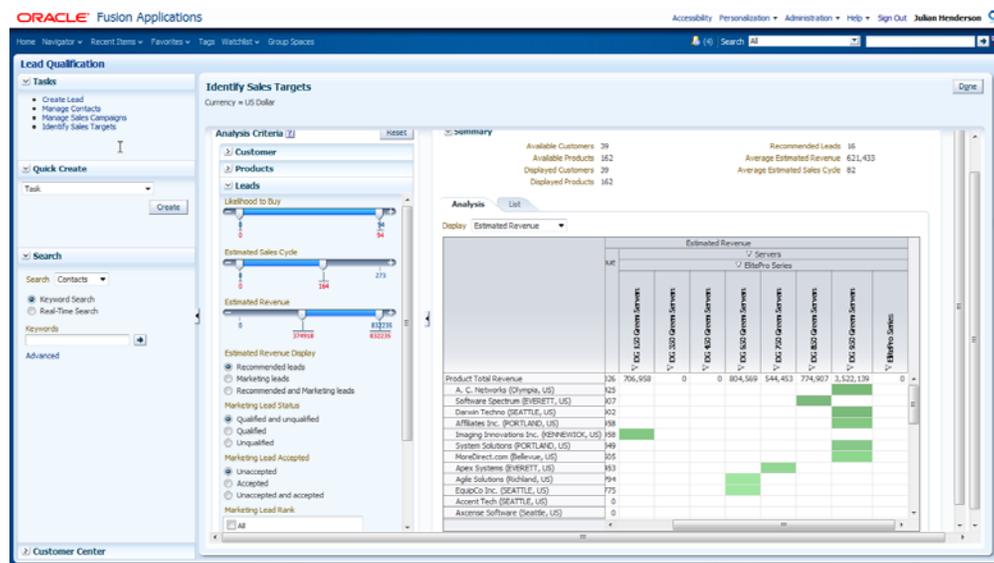
social networking, the social nature of selling has accelerated. Now, rather than pulling information from connections, sales reps can simply be notified when relevant information is available. Oracle Fusion CRM taps into this trend with the following core capabilities:

- Activity streams that provide real-time updates that notify sales users of any activity impacting their customers and deals
- Discussion forums that enable users to post topics and collaborate on critical sales and customer issues
- Facebook and LinkedIn integration that offers users easy access to essential social networking sites

### Sell smarter with embedded sales intelligence

Salespeople don't necessarily need to work harder to make a sale—they need to work smarter. Embedded intelligence within Oracle Fusion CRM tells sales reps what they need to know. Key functionality of Oracle Fusion CRM's embedded sales intelligence includes:

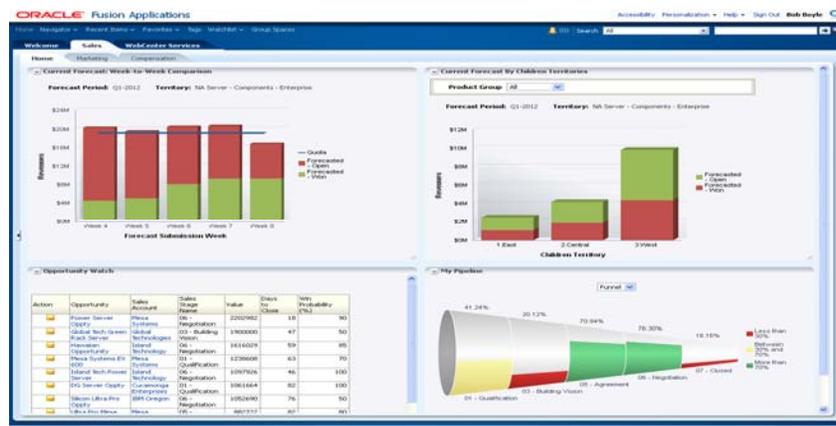
- Opportunity Landscape that provides sales reps with a territory-specific heat map of recommendations and leads so that they can generate the highest-potential sales opportunities
- Opportunity Management that supports both basic and complex sales opportunities, enables collaboration among direct and indirect teams, provides rich insight from historical opportunities, and provides step-by-step coaching
- Competitors and References that provides proactive competitive monitoring and provides a one-stop shop for the right references to win key deals



Oracle Fusion CRM Opportunity Landscape automatically identifies the best prospects within each sales rep's territory.

### Create better sales plans

No matter how good your sales team is, selling is still an obstacle if there isn't a sound plan that drives alignment and results. Oracle Fusion CRM maximizes revenue potential by providing a fully integrated sales planning solution that includes Territory Management, Quota Management, Incentive Compensation, and Sales Forecasting. Unlike any other CRM offering, Oracle Fusion CRM includes these capabilities as a single provider solution. And they work seamlessly together to provide unequaled flexibility and power to drive the sales planning process. With Oracle Fusion CRM, organizations can rapidly modes sales plans based on a range of what-if scenarios without taking down their system of record. They can then easily deploy the desired plan.



Oracle Fusion CRM delivers both unparalleled sales visibility and sales planning capabilities.

Territory Management maximizes account and market coverage to deliver a more-even as well as a more strategically purposed distribution of opportunities across sales reps. This ensures that one sales rep is not overloaded with opportunities while another sales rep is lacking. Territories can be based on a range of independent or coexisting criteria that can be evaluated prior to new plan rollout, such as geography, industry, purchase potential, and more. Different territory proposals can easily be evaluated side by side against each other. Revenue is also maximized by ensuring that the right sales reps with the right skills are assigned to the right opportunities. Additionally, tight integration with quota management and incentive compensation ensures the ability to quickly adjust territories if there are any changes to product or personnel. Oracle Fusion CRM's Quota Management optimizes quota allocation and tracks performance to plan, while Incentive Compensation aligns incentives to sales goals and tracks payments. Tight integration between Quota Management, Incentive Compensation, and Territory Management aligns quotas with territory potential and ensures equitable distribution of opportunities with achievable targets. The end result is a more-compelling plan to incent the right sales behavior.

Finally, Oracle Fusion CRM Sales Forecasting helps sales executives predict and achieve optimal sales performance. By eliminating the need for sales users to manually create sales forecasts, executives can gain real-time visibility into sales performance and quickly adapt to changing or unexpected business dynamics that deviate from plan.

"We can give the management of territories over to the sales teams, so they can control what they know best. This means that IT doesn't need to devote a full-time resource to support the process as before."

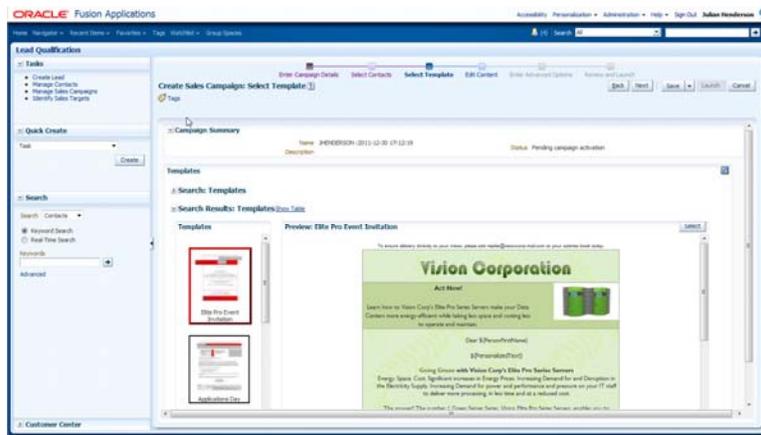
-- Pella Corporation

## Get more quality opportunities by increasing sales efficiency

Sales reps spend too much time on administration and not enough time in front of customers selling. They also lose precious time waiting for territory assignments and quota and compensation plans. Meanwhile, organizations spend countless hours on hundreds of spreadsheets to put sales plans in place, losing out on revenue while the sales field waits. Oracle Fusion CRM can help address these issues.

### Complete sales tasks faster

With Oracle Fusion CRM, sales reps can easily update sales information such as opportunities, activities, contact information, and notes while on the go. Quick edits and mass update functionality enable users to rapidly make common updates to sales opportunities. More importantly, users can quickly capture and update data from the application of their choice, whether via a Web browser, Microsoft Outlook, or their smartphone.



With Oracle Fusion CRM, sales reps can easily generate their own marketing campaigns *and* adhere to corporate standards.

## Generate and convert more and better leads

Oracle Fusion CRM helps sales and marketing organizations generate higher-quality leads for sales follow-up. By starting with higher-quality leads, sales reps spend more time on sales opportunities that are most likely to close. Oracle Fusion CRM helps close more sales by offering the following features:

- Campaign management that enables reps to easily generate their own targeted campaigns with a step-by-step wizard-driven interface, and measures sales follow-through and effectiveness
- Lead management that enables lead nurturing and lead scoring based on predefined criteria
- Opportunity Landscape that identifies the best sales prospects within each sales rep's territory

### Ensure rapid user adoption

Poor user adoption is the killer of any CRM implementation. Applications that are hard to use simply *don't* get used. And, if users aren't entering customer information into the system, then there is no data management from which to glean insight on how to better run the business. Oracle Fusion CRM's Web 2.0 interface coupled with its seamless integration with Microsoft Outlook and other popular mobile devices makes it easy for sales reps to not only interact with vital customer information, but also to more effectively execute on the go with an intuitive, role- and task-driven interface.

"Love the user interface...it is incredibly easy to use and update. The capabilities and intuitive design will dramatically simplify the process of getting sales call data into our CRM system while they are in the field."

-- Colorcon



Oracle Fusion CRM provides powerful insight and a task-driven interface, and works how and where sales teams work.

### Easy to configure

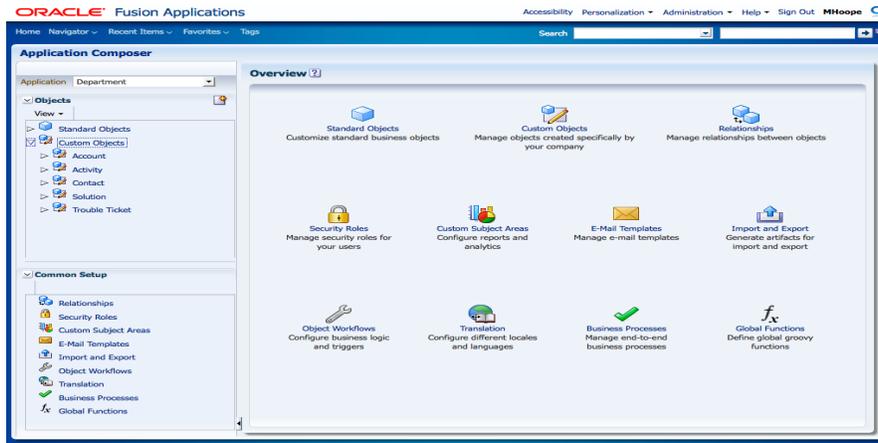
Business users want to modify their CRM application to meet their needs—whether it’s adding a new field to the application, creating a new report, modifying a business process, or changing the look and feel of the user interface. In the past, these types of changes would require a technical resource from the IT department and take days, weeks, or even months to complete. Oracle Fusion CRM offers highly graphical, wizard-like “composers” that enable extensibility and empower business users—not just IT developers—to create changes, with no programming expertise required. The benefit to sales organizations is the ability to make these changes instantaneously.

To create Fusion Composers, Oracle conducted pattern analysis to understand how organizations typically modify their business applications, then designed four Fusion Composers to model these patterns.

Oracle Fusion CRM offers the following composers for business users to address configuration and extensibility needs:

- **Application Composer:** Easily extend core CRM functionality and build a wide range of application modules to extend your CRM
- **Page Composer:** Easily customize the look and feel of the user interface to meet your needs

- **Process Composer:** Easily build and modify business processes with repeatable workflows that match best internal practices
- **Report Composer:** Easily create and modify reports with embedded advanced analytics and quickly incorporate the KPIs that matter most



With Oracle Fusion CRM, business users can easily extend their CRM applications to meet their organization's needs.

### Easy to deploy

Because Oracle Fusion CRM is available as a managed service, organizations can have Oracle Fusion CRM up and running in a matter of days or weeks. Oracle Fusion CRM is also available on-premise. Because there is a single code line, organizations can easily move from on-premise to the cloud—or vice versa—or they can implement a hybrid on-premise/cloud model based on specific business needs.

### Conclusion

Sales reps will use a technology that expedites the sales process. Oracle Fusion CRM applications are a set of applications that are driven by the needs of the sales users.

Oracle provides deployment flexibility, extensibility, and deeply integrated tools to support the sales process from the beginning to the end.

- i. Deployment flexibility: Deploy as you choose, as a public or private cloud, or as a hybrid
- ii. Extensibility: Wizard-style composers enable a range of business and power users to configure the applications rather than go to IT

- iii. Benefits of a complete Oracle Fusion Applications suite: Designed as a complete suite of modular applications, Oracle Fusion CRM applications are designed to work with other Oracle enterprise applications

As businesses continue re-evaluating and adjusting how they sell, they must remain focused on generating higher-quality leads that convert to sales. To achieve this, the CRM applications that sales and marketing organizations use must optimize sales performance management and increase team productivity.

Oracle Fusion CRM is part of a full application suite that spans the front and back office. The solution combines the strengths of Oracle Fusion Applications and underlying middleware technology. Oracle developed Oracle Fusion Customer Relationship Management to address the specific challenges of sales organizations. By incorporating embedded best practices, Oracle Fusion CRM is the industry's most modern, standards-based, scalable, and extensible technology platform.

To learn more about Oracle Fusion CRM, please speak with your Oracle sales representative, or go to [cloud.oracle.com](http://cloud.oracle.com).



Rethinking CRM: Drive Greater Sales  
Productivity with Oracle Fusion CRM  
February 2012

Oracle Corporation  
World Headquarters  
500 Oracle Parkway  
Redwood Shores, CA 94065  
U.S.A.

Worldwide Inquiries:  
Phone: +1.650.506.7000  
Fax: +1.650.506.7200

[oracle.com](http://oracle.com)



Oracle is committed to developing practices and products that help protect the environment

Copyright © 2012, Oracle and/or its affiliates. All rights reserved. This document is provided for information purposes only and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark licensed through X/Open Company, Ltd. 0611

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