CRM Software Review

About this Review

Thank you for requesting this executive summary of ISM's comprehensive CRM Software Review for Oracle Siebel CRM. Since 1989, ISM staff has tested dozens of software packages annually from CRM vendors around the world. Each review is currently based on 179 criteria, drawn from input we've received from senior executives and sales, marketing and customer service personnel. ISM receives no money from any vendor it reviews, to ensure 100% objectivity. Vendors must fully demonstrate their functionality for each criterion.

About ISM

Since 1985, ISM has created & implemented strategies to delight the customers of best-in-class organizations worldwide. ISM provides solutions that maximize user-adoption, ensure seamless collaboration between customer-facing functions and enhance customer engagement. We combine strategic vision with powerful technologies and tools to deliver actionable strategies that lead to an optimized customer experience, improved customer service, better-calibrated marketing programs and ultimately, to increased customer acquisition, retention & growth. Let us review your current customer-facing technology programs and activities, and ready your organization for 2030 and beyond.

Contact us for the full, detailed 20-page CRM Software Review for Oracle Siebel CRM or any of 30 other major CRM applications.

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ORACLE

Oracle Siebel CRM at a Glance:

Business Functions

Business Functions	
Contact Management	✓
Account Management	✓
Sales Management	✓
Time Management	✓
Customer Contact Center	✓
Customer Service	✓
Telemarketing/Telesales	✓
Marketing	✓
Lead Management	✓
Business Analytics	✓
e-Business	✓
Project Management	✓
ERM	✓
Field Service	✓
Mobile CRM	✓
Social CRM Functionality	✓
Real Time Features	✓
User Friendliness/Support	✓

Evaluation of Business Functions

LIMITED   GOOD   STRONG
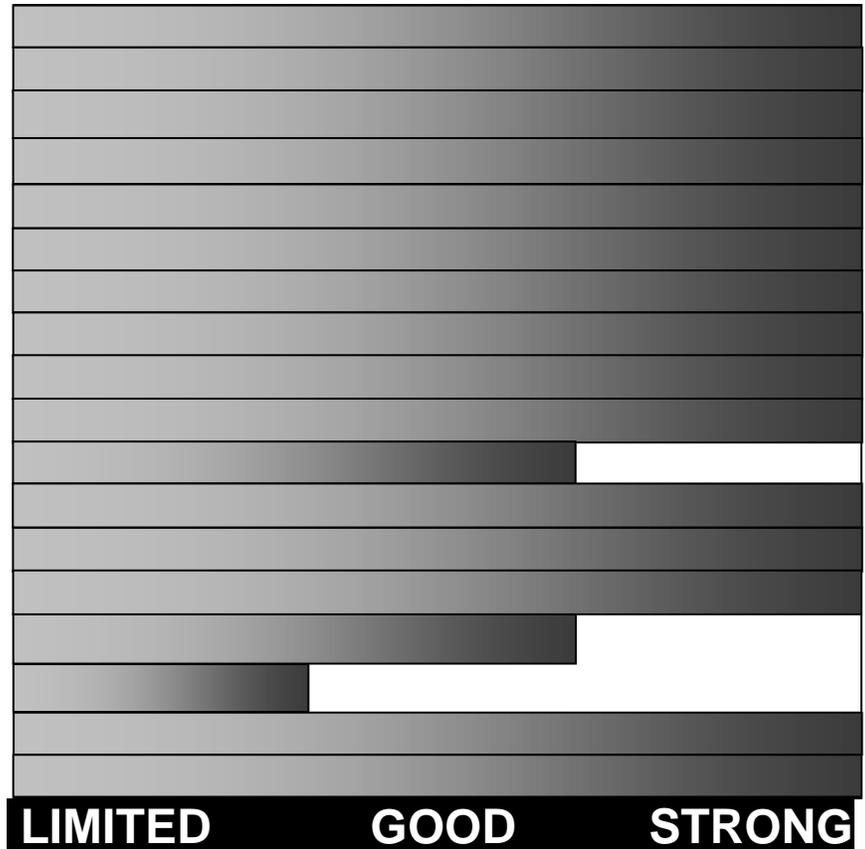
Strengths:
Contact management
Account management
Sales management
Time management
Telemarketing/Telesales
Customer contact center
Customer service
Field service
Marketing
Business analytics
Lead management

Weaknesses:
Lack of DMBS supplied with the package
Third party fax/modem

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Executive Summary

Oracle Siebel CRM is a comprehensive customer relationship management solution for the enterprise. It is strong in all business functions with the exception of e-Business and mobile CRM, which is rated as good and Social CRM functionality, which is rated as limited. Oracle Siebel CRM's screen design and navigation is intuitive and offers the user several ways to access information. Screens and tabs that a user can view are determined by role of the user. System administrator types as well as users can modify personalization options on the fly by selecting the tabs (e.g., Calendar) that they would like to have on the screen. In this manner, a user can access a considerable amount of information without having to switch from one screen to the other. Each line item within a particular tab can support a hyperlink to access more information. A "thread" bar tracks the path of the user's work through multiple screens in order to provide a trail from which a user can click his or her way directly to any previous screen. Siebel provides the capability for on-line graphics to display real-time information for items such as important service events, trends or service request activity. These on-line graphics support drill down functionality for more detailed information.

Oracle Siebel CRM is a very comprehensive and robust enterprise CRM suite. Oracle Siebel CRM is developed primarily for large organizations and thus the application's functionality may be more than some companies need. Additionally, the product is broken up into many independent features that, when used together, comprise a module such as Customer Interaction Center or Marketing.

Account management

Account management supports an organizational chart, which graphically displays business relationships of both internal and external contacts. Also, accounts can be prioritized by status, value and by probability of success for enhanced opportunity management. Siebel modules support account management functionality such as analysis of order history (e.g., track delivery times, number of returned materials, etc.), lead tracking (e.g., track a lead or group of leads through a sales cycle) and sales cycle analysis (e.g., quota and achievement analysis). Account management functionality helps team members, current and new, track the account's history with respect to pre-defined action items set up to close a sale or service a customer. Siebel provides the ability to track changes and make updates to presentations, so that the user's proposals and presentations are always up to date. The presentations are delivered in MS-PowerPoint.

Sales management

Sales Management is supported by a sales coaching tool known as the Sales Assistant. Sales Assistant lets the sales rep access relevant deal information in real time. Also, the Fulcrum search tool can be used to search the entire database by key words and questions. Sales team members can track activities (e.g., completed, opened) related to moving an opportunity along. Expense reporting can be performed by simply marking each expensed activity with a checkmark and a dollar amount, and then pressing the auto-expense button whenever the user wishes to generate an expense report. Expenses can be expressed in different currencies and converted to a base currency. The user can manually add items, break out detailed expenses, and then submit the expense report. It can be automatically routed to a manager, who can approve it on-line and then route it to accounts payable. The status of the expense report can be checked anytime.

Customer contact center

Customer contact center functionality is enhanced with Siebel eService for customer self-service, and a "call me now" feature, Siebel eCollaboration for hosting virtual meetings and Siebel Assignment Manager for the assignment and escalation of incidents. Also, workforce management is supported with intelligent call transfers (Siebel Assignment Manager), an application server program that automatically assigns employees with the most appropriate skills to a customer service incident. These functions can be integrated with a multi-media portal, which would allow the customer to request service and engage appointments.

Customer service

Customer service offers the user the ability to assign, track and escalate assignments, as well as share information between sales and service departments for team-based incident resolution for incident lifecycle management. The user can also access the service request profile and an interactive calendar to check on a scheduled visit or update the service calendar to match the customer's desired window of onsite service. Oracle Siebel CRM can automatically assign an incident to the appropriate representative, group or available agent based on pre-defined business rules, which will route the incident to the representative with the most appropriate skill, training and certification levels. Oracle Siebel CRM goes a step further in incident tracking and reporting in that if an incident is unresolved, Oracle Siebel CRM not only escalates the incident to the next level within the company, it also notifies the customer that the incident is being escalated. Also, customers can access personal incident information via the Internet to track the status of his/her case.

Field service

Field service functionality is supported by the ability to schedule calls and to track inventory and supply resolutions, interaction history and details of a customer's operating environment out to the field. Inventory management is supported by the ability to track inventory in real time via Siebel Service Inventory. Minimum and maximum counts are used for automatic replenishment of stock. Parts information (e.g., availability, parts) is accessible to the customer service representative, field service engineer, or logistics manager in real time using the part locator feature. Return material and authorization (RMA) and service orders can be processed within the Siebel Field Service application.

Telemarketing/Telesales

Telemarketing/Telesales functionality is supported by a scripting feature. This scripting feature displays answered and unanswered questions for quick analysis in an easy-to-read and easy-to-navigate window. Another strong feature is the ability to generate call lists, attach them to multiple campaigns based on pre-defined criteria.

Marketing

Marketing is supported by a marketing encyclopedia, which updates files on a real time basis via the server or the Internet. Also, there is functionality to manage and track special events such as press conferences and seminars. Surveys can be attached to a special event (e.g., seminar) to assist in rating and tailoring seminar content and effectiveness.

Lead management

Lead Management is supported by a data-cleansing tool known as Siebel Data Quality, which automatically standardizes company names, abbreviations, postal codes, etc. Lead enhancement is integrated with Dun & Bradstreet's information database, which automatically attaches additional data relevant to a lead record. The additional information helps to qualify a lead in order to leverage a sales rep's time and to leverage the sales rep's ability to close the sale.

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Company Profile

YEARS IN BUSINESS	40	**PRICE – MULTI-USER**	Vendor Disclosed
NUMBER OF EMPLOYEES	115,000	**SERVER**	Vendor Disclosed
LICENSED SEAT/USERS SOLD – LAST 12 MONTHS	100,000+ seats		

TOTAL NUMBER OF CUSTOMERS	4,000+ companies
LANGUAGES AVAILABLE	American English, Danish, Dutch, French (Standard), German Italian, Japanese, Portuguese (Brazil), Spanish (Modern), Swedish, Chinese (Simplified), Chinese (Traditional), Czech, Finnish, Greek, Hebrew, Korean, Portuguese (European)
LIST OF RESELLERS	Primarily direct sales.