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Siebel CRM Achieving Modern Agility

CAS5750

Nazeer Shaik, Alaska Airlines
Xavier Lucas, Alaska Airlines
Aashish Mahodaya, Insperity

Marc Verbeek, Oracle

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Agenda



Aashish Mahodaya
Manager, Oracle CRM and Analytics





Achieving Modern Agility and Continuous Delivery for Enterprise CRM

- Aashish Mahodaya

Manager, Oracle CRM & Analytics,
Technology - Business Applications

Agenda

- Insperity, Company overview
- Current Footprint – CRM/BI (OneVoice)
- Insperity 's CRM journey
- OneVoice Siebel CRM 2018 upgrade project
- Insperity's Business/Technical Agility with Siebel CRM 2018
- Upcoming CRM Roadmap plans

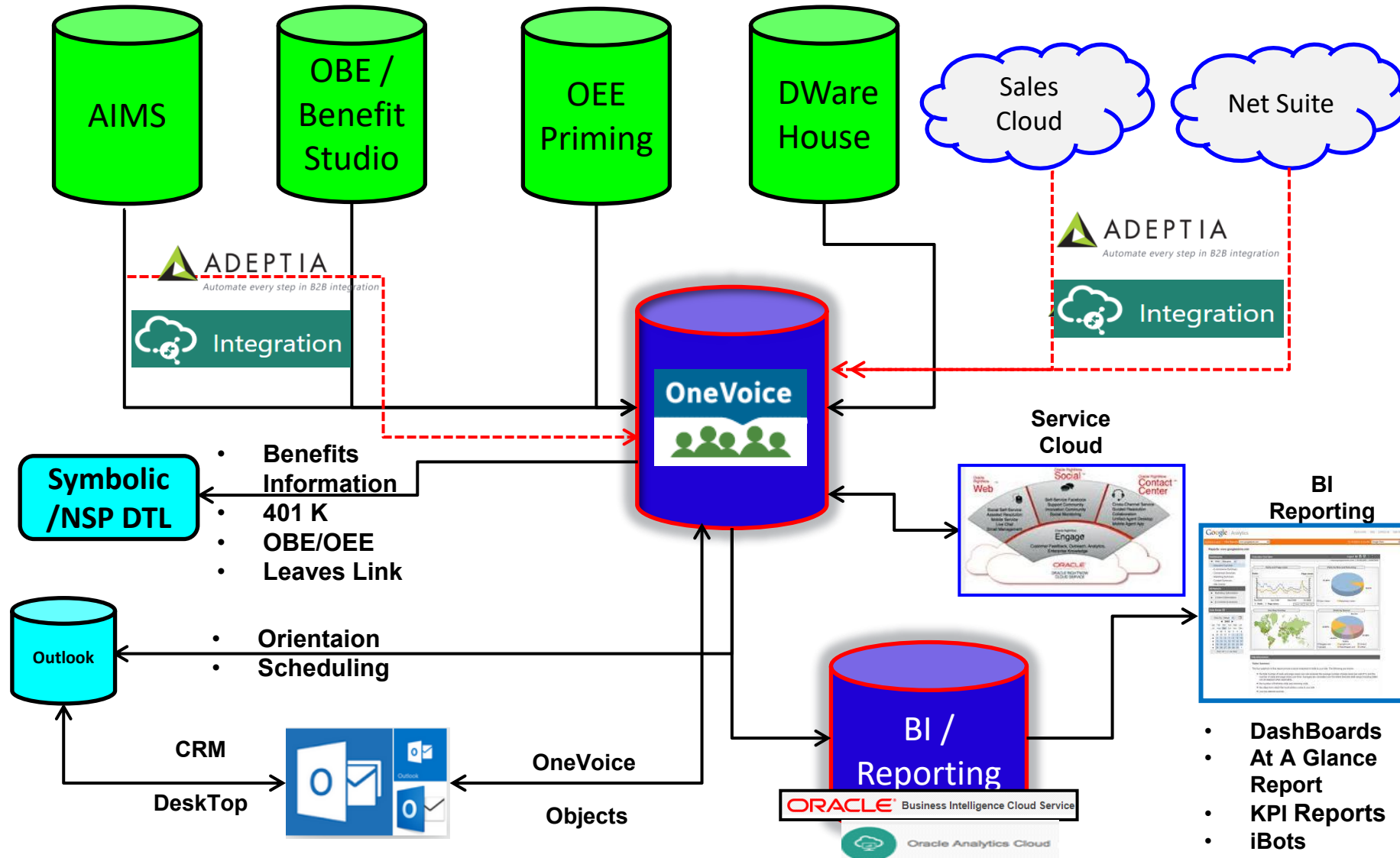
Company Overview

- 30+ Years old company, Founded in 1986
- Publicly traded – NSP
- Full Service HR solution - Insperity[®] Workforce Optimization[®]
- Individual Solutions - Business Performance Solutions
- 60 Offices throughout United States
- Corporate Headquarters – Kingwood/Houston

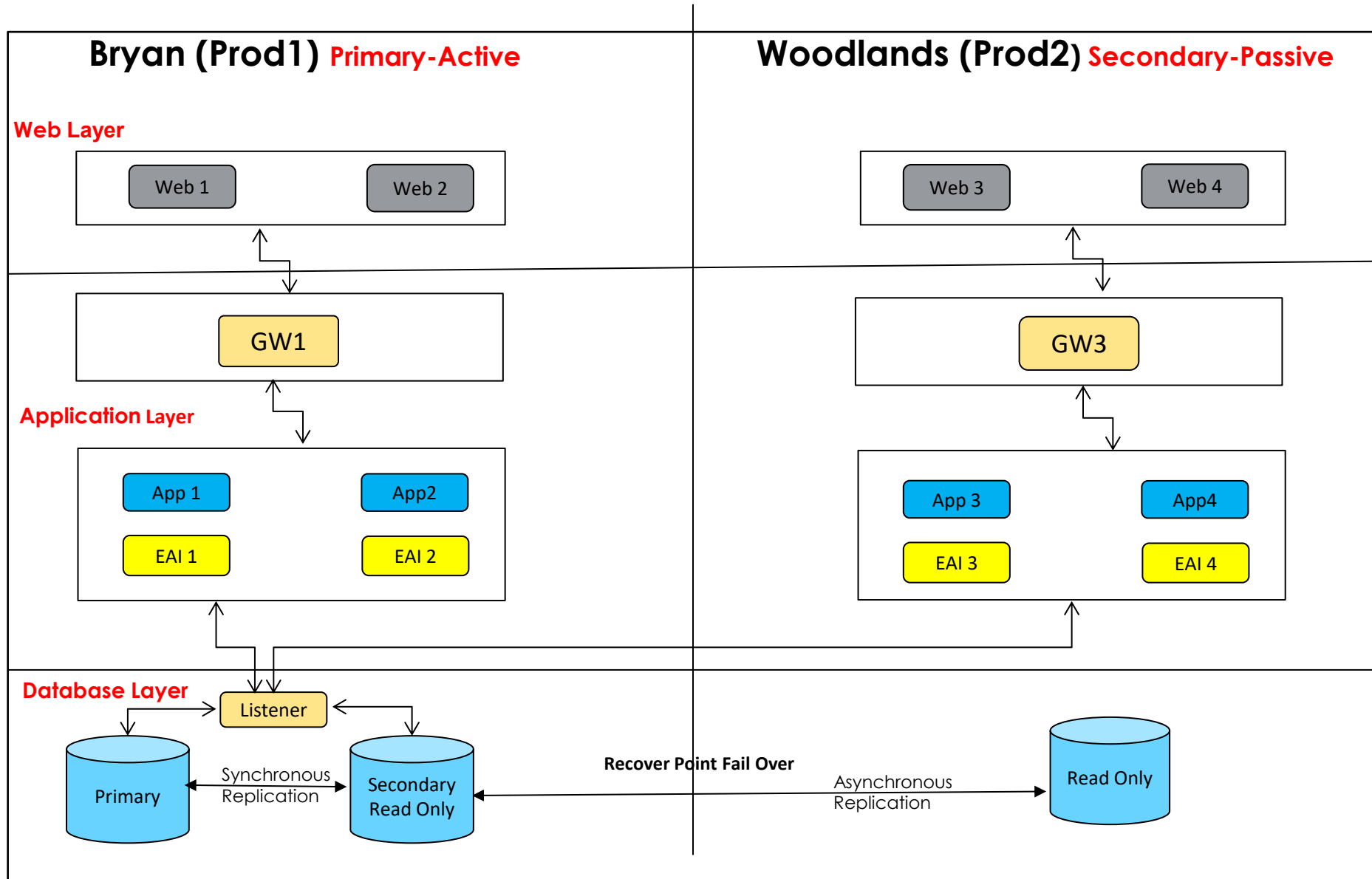
Insperity - Current CRM/BI Application Platform

- Siebel On Premises CRM version 18.5
 - For approximately 1,400 users
 - Core Siebel modules include CRM Base, Call Center, Field Service, SSSE, BIP
- Oracle Service Cloud – November'2017 Release
 - Chat
 - Co-browse
- CRM DeskTop 3.10
- OBIA 7.9.6.4 /OBIEE12c, BICS/DV
- SQL Server 2016, Oracle 11g DB
- Hyper-V, Windows 2016 Servers, AIX Servers

OneVoice - Siebel CRM/BI Architecture



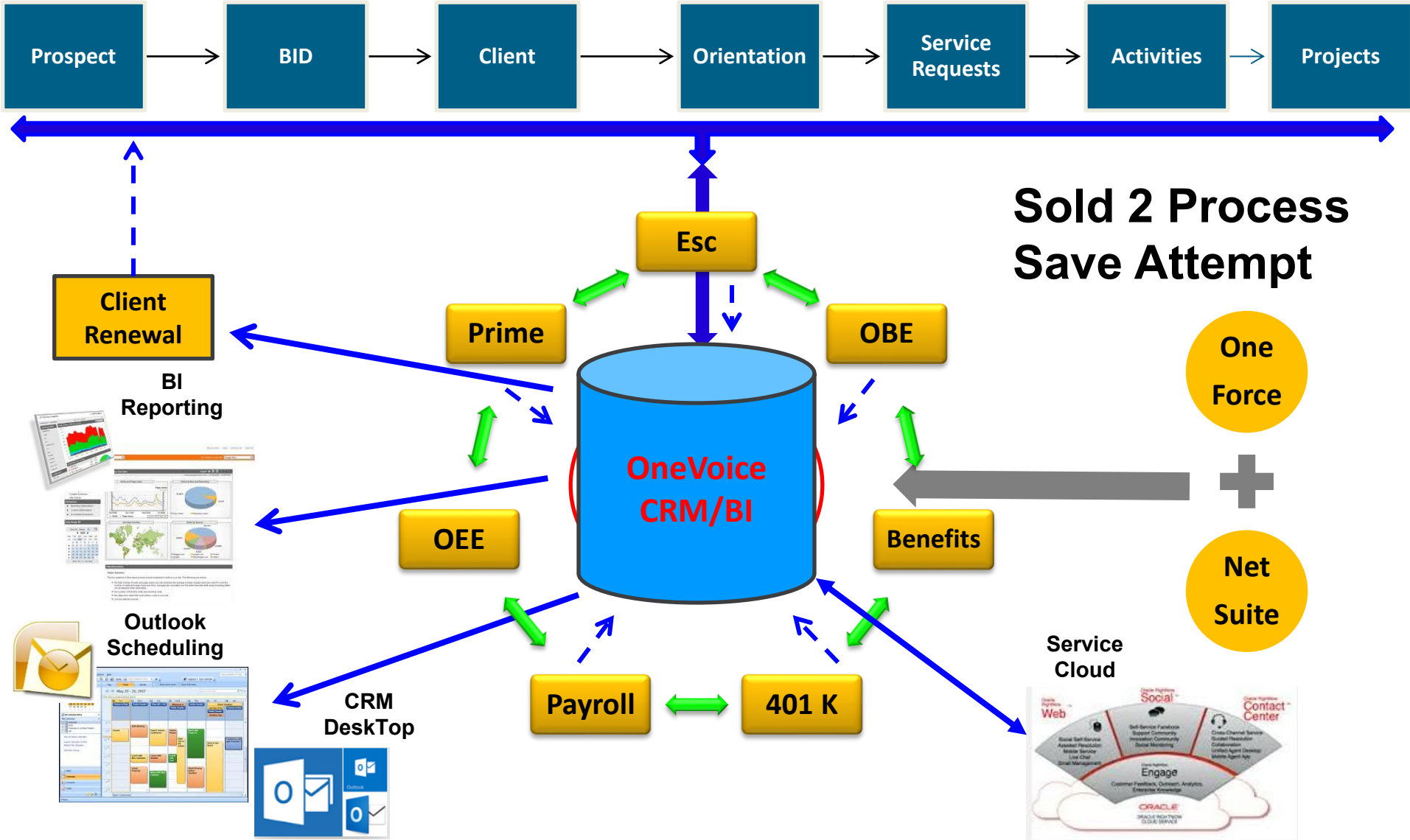
Siebel Production /Prod2 Architecture (Active - Passive)



Insperity's CRM journey

- OneVoice – 360 Degree CRM/BI Solutions @ Insperity
 - On-premise strategic CRM (Siebel) implementation
 - Siebel, Integration with on premise legacy and cloud systems (Service Cloud, NetSuite, Sales Cloud)
- Expanding Service Channels, Siebel + Service Cloud
 - Chat /Co-Browse/Email
 - Multi-channel contact center service management
- Business agility and competitive advantages by Siebel CRM 2018 adoption
- Continuous Delivery – Big leap for Enterprise CRM solution

Case Study - OneVoice (CRM/BI Process Flow)



OneVoice (CRM)/BI usage

- 360 Degree view of information for strategic business decisions
 - Increase customer service level, service capacity and service efficiency
 - Standardization & Automation of business processes
- Enterprise wide reporting solution, Integrated analytics dashboards
 - Self-service, Ad-hoc reporting tool for power users/end users
 - BIP - Real time CRM reporting
- CRM DeskTop, Integration between Siebel & Outlook
- Service Cloud (Chat/Co-browse) Siebel Integration

Siebel CRM 2018 upgrade, Technical/Business considerations

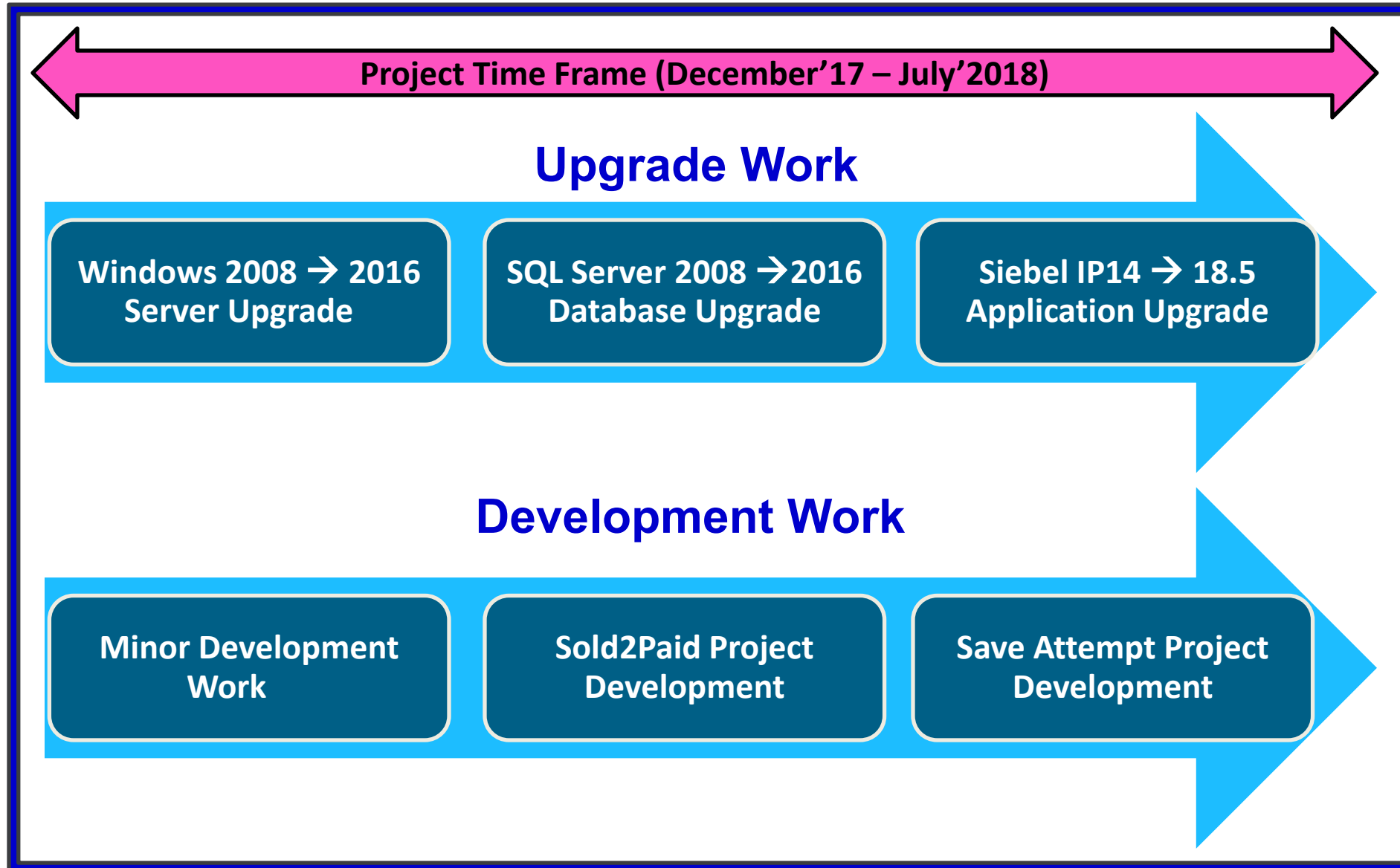
Technical

- Windows 2016 Server upgrade
- VM to Hyper-V machines upgrade
- SQL Server 2016 DB upgrade
- Pathway to multiple product enhancement projects
 - Prod-Prod2 Architecture/Gateway Clustering
 - SSSE – Outlook 365 Integration
 - Use of REST/API in Integrations
 - Mobile App Development
 - OneVoice 2.0 / UI-UX Redesign Project

Business

- Usage Pattern Tracking
- Test Automation
- Faster, Reliable customer service
- Parallel development
- Business Agility, Process driven automation
- Customer Adoption, Insperity CX theme

Siebel CRM 2018 Upgrade & Parallel Development



Overall Upgrade Process- Challenges/Considerations

Challenges

- Tomcat Web Server Issue
- Migration, Incremental/Full migration issues
- Workspace / Parallel development
- High Availability architecture
- LOV Management (Pre-Prod/Prod)
- Test Automation integration
- SSSE - Outlook365 integration

Considerations

- Architecture decision
- New Migration process
- Parallel Development
- Gateway clustering
- Load/Stress testing in Pre-Prod
- Proactive/Active Patch Set planning
- Performance improvements

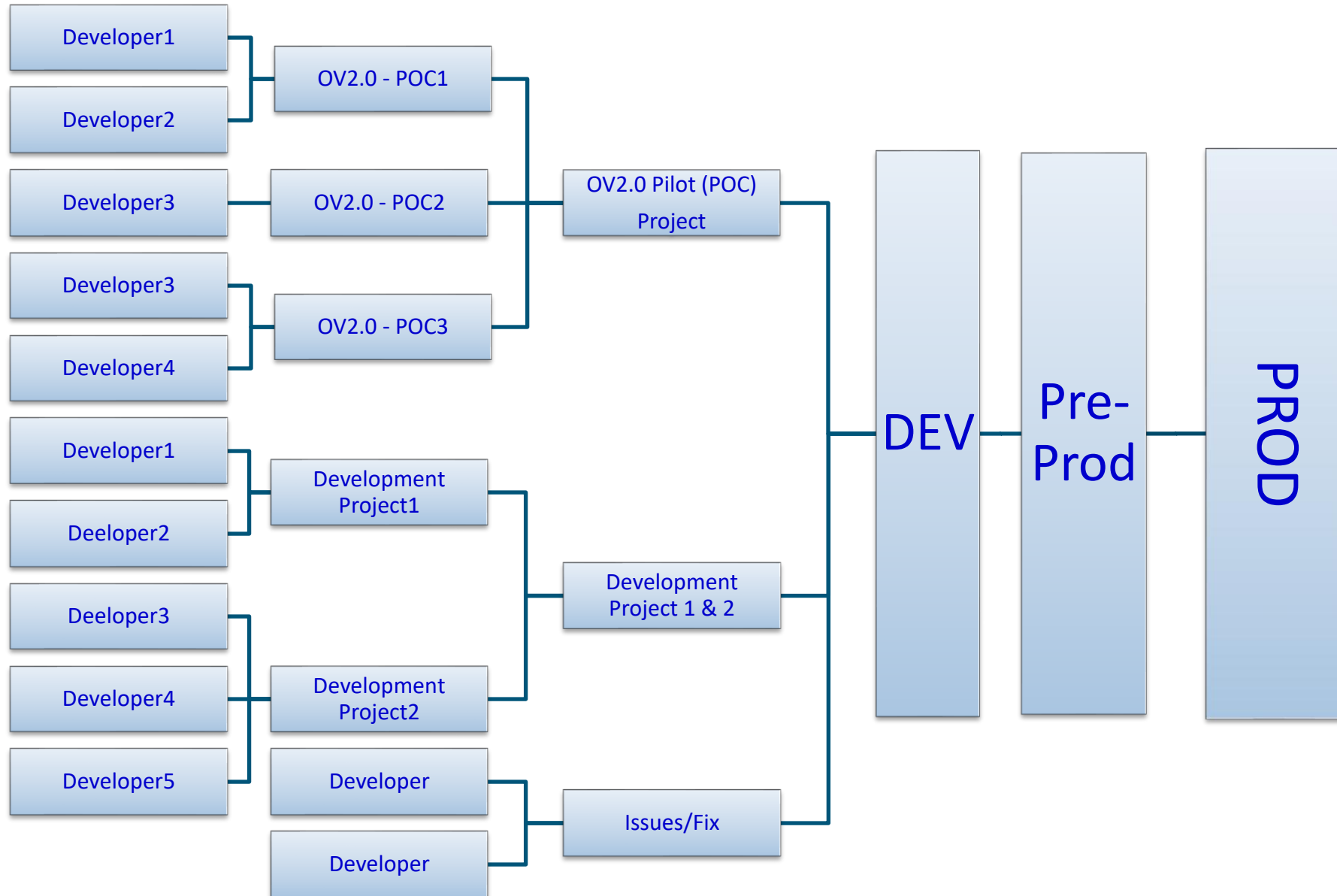
Insperity's Modern Agility with continuous delivery model

- Business Agility, Ability to move quickly and easily for faster development
 - Usability & Process Efficiency Projects
 - OneVoice Mobile App
 - OneVoice UI Redesign
 - Sold to Paid 2018
 - Save Attempt 2018
 - Unifying Client Service Experience
- Business Agility and competitive advantages by 18.5 adoption
- Faster parallel development for business projects
- Adaptive environment of experimentation and continuous improvement

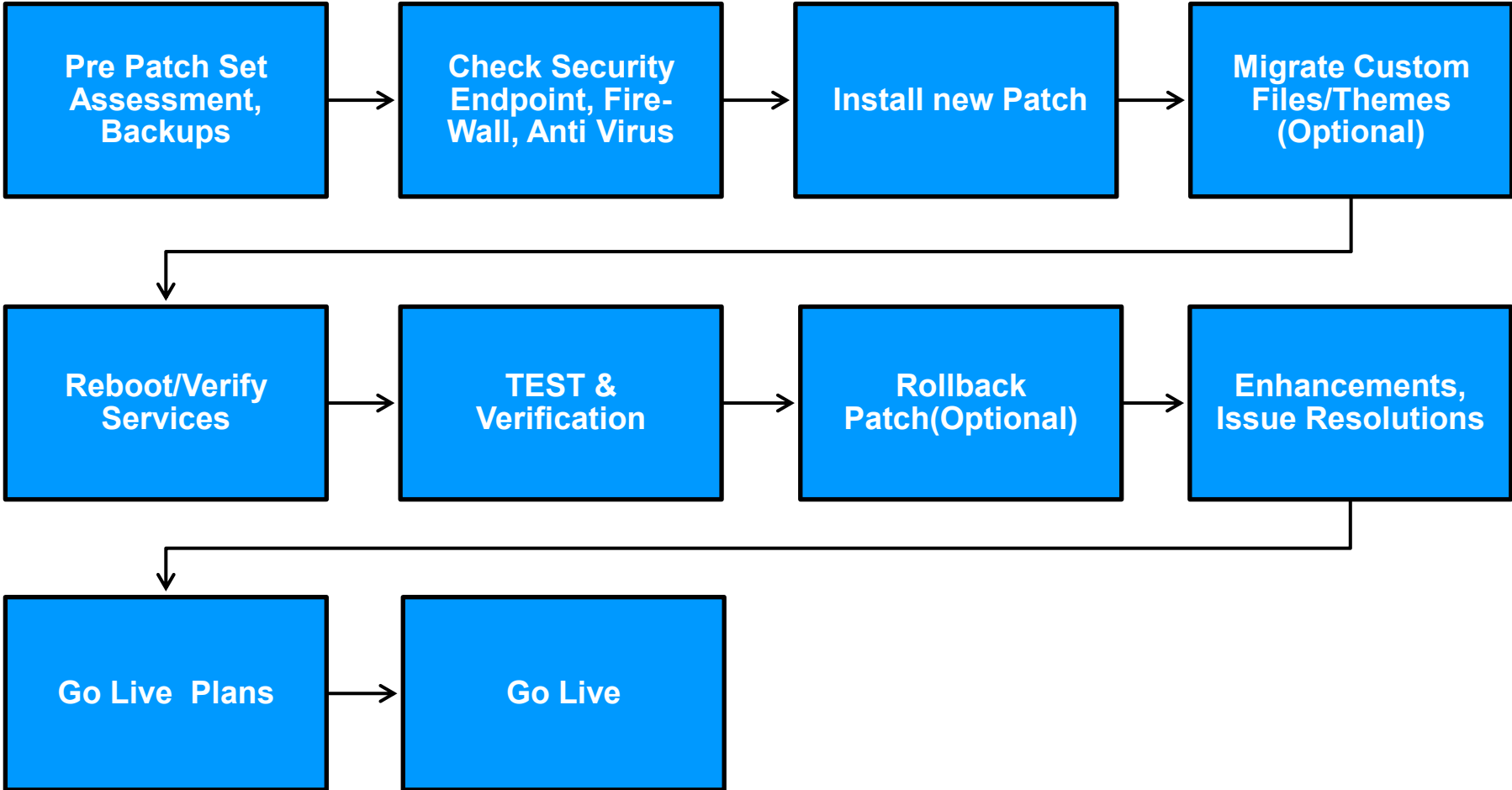
Insperity's Technical Agility with continuous delivery model

- Technical Agility
 - Faster installation and upgrade
- Continuous Delivery
 - Faster development and deployment
- Simplification in application update process
- Reducing maintenance costs over the old application upgrade approach
- Siebel Composer Enhancements for Web Tools, Parallel Development
- High Availability architecture with Gateway Clustering
- SSSE – Outlook 365 Cloud integration

Parallel Development & Agility



Simplified faster innovation delivery model



- **OneVoice 2.0**
 - OneVoice, Open UI Redesign
 - Responsive UI
 - Business process/Event driven application
 - Role based personalization
 - Modern Look n Feel, Intuitive layout
 - Improved usability and increased efficiency for users
 - Reduce training efforts
- **Integration Redesign Projects**
 - Integration Architecture mechanism alignment
 - Two way integration, On-Pre/Cloud applications
 - Expand service data integration
 - Active-Active Hi Availability Disaster recovery platform
- **SSSE-Outlook365 Integration**

- OneVoice Mobile App
 - Mobile app with OneVoice data and functionality on phone
 - Easy access to OneVoice while traveling or at client's location.
 - Orientation, Performance Specialist, WO Service Teams
 - Multi-channel mobile app (for iOS, Android & Windows-based devices)
- 360 Degree enterprise reporting enhancements
 - Hybrid Reporting (On-premise, Cloud)
 - System Dashboard – Actionable Intelligence
- Service Cloud /Multi Channel Service Expansion
- Unifying Client Service Experience Projects
- Process Efficiency Development Projects

Thank You !!!



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Questions?



Aashish Mahodaya
Manager, Oracle CRM and Analytics



Siebel CRM OpenWorld Sessions

Day	Time	Session #	Description	Location
Monday	11.30-12.15	PRM4277	Siebel CRM Strategy and Roadmap for Digital Transformation	Moscone West - 3003
	15.45-16.30	PRO5748	Exciting Innovations in Siebel CRM to Enhance Agility and User Experience	Moscone West - 3012
	16.45-17.30	CAS5743	Siebel CRM Customer Leadership Panel	Moscone West - 3012
Tuesday	12.30-13.15	CAS5745	Creating Meaningful Customer Experiences to Beat the Competition	Moscone West - 3001A
Wednesday	11.15-12.30	CAS5749	The Art of the Possible - Create your own UX with Open UI	Moscone West - 3001A
	12.30-13.15	TIP4394	Upgrading and Maintaining Siebel CRM in the Cloud or On-Premises	Moscone West - 3001A
Thursday	10.00-10:45	CAS5750	Achieving Modern Agility and Continuous Delivery for Enterprise CRM	Moscone West - 3001
	11.00-11.45	CAS5751	Gaining Industry Advantages with Siebel CRM Innovations	Moscone West - 3020
	13.00-13.45	PRO5726	Enterprise Agility with the Siebel CRM Continuous Release Model	Moscone West - 3014

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