



IBM Systems and Technology Group University 2005

IBM Systems and Technology Group University 2005



v 1.0

© 2005 IBM Corporation

This presentation is intended for the education of IBM and Business Partner sales personnel. It should not be distributed to customers.



IBM Systems and Technology Group University 2005

CRM Siebel New Enhancements You Asked For!

Course #:

Speaker Name
Speaker Title



Agenda

- **New Functions in Release 7.5 and 7.5a**

Learning Objectives

At the conclusion of this material, you should be able to:

- Use CRM Siebel to:
 - Take advantage of the R7.5 and R7.5a usability and functionality enhancements including:
 - Opportunity Management Simplification
 - Improvements to Process and advancing the Sales Stage
 - Create and update opportunity records and help you manage your pipeline
 - Collaborate with other sales people, including Client Reps, Sales Specialists, Business Partners, ibm.com, and Technical Sales Support – SOSWOS!

CRM Siebel R7.5 and R7.5a Enhancements

▪ R7.5 Functions

(October 2004):

- Scrolling/Slide Bars
- Pick Lists/Shuttle Applets
- Customizable Tab Layout
- Flexible Defaults for Show Views
- Fix List Column Positions
- Query Assistant
- Record Dragging Capability
- Opportunity Key Defaults
- Steam Revenue Record Enhancements

▪ R7.5a Functions

(Target: End of Jan 2005):

- No more Smart Scripts → Toggle applets that replace all SmartScripts for opportunity creation and field validation
- New fields, icons, and hyperlinks in the Opportunity screens and views
 - More Opportunity Key Default Settings
- Simpler processes for assigning a new primary, changing the sales stage, and sorting opportunity activities and notes

What to know about Default Opportunity Field Values

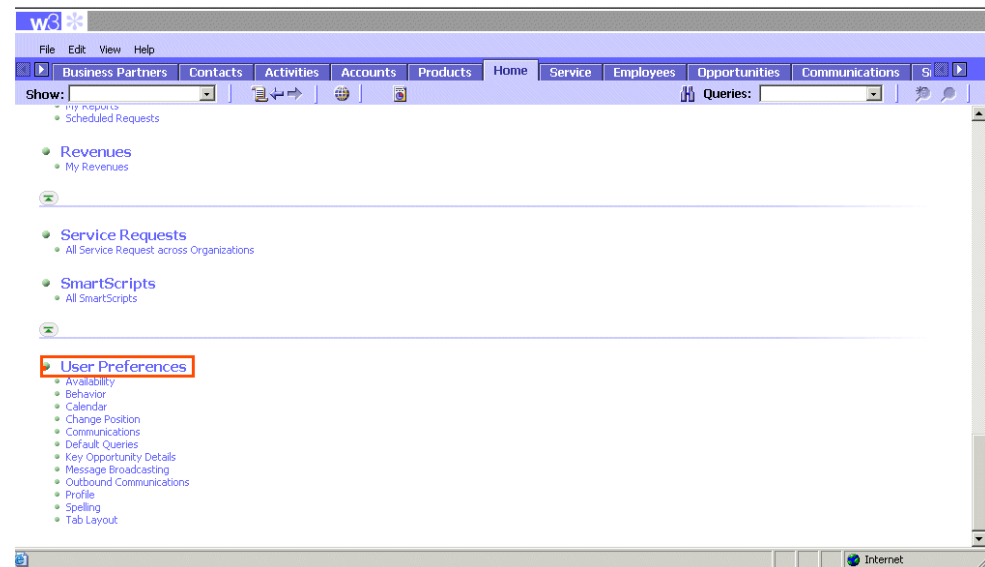
Used to SIMPLIFY OPPORTUNITY CREATION!!

When specific characteristics of your opportunities are typically the same, consider setting up

Default Opportunity Field Values

Default opportunity field values automatically populate certain fields, which **saves you time** creating new opportunities

- Setup Default Opportunity Field Values in your **User Preferences**



Only certain opportunity fields are available for setting up default values.....

In **User Preferences**, click the **Key Opportunity Details** tab to display which opportunity fields can be predefined with default values.

The screenshot shows the 'User Preferences' dialog box with the 'Key Opportunity Details' tab selected. The dialog has a menu bar (File, Edit, View, Help) and a toolbar with buttons for Accounts, Products, Home, Service, Employees, Opportunities, Communications, SmartScripts, Calendar, and User Preferences. Below the toolbar is a 'Show:' dropdown set to 'Key Opportunity Details' and a 'Queries:' field. The 'Key Opportunity Details' tab is active, showing a grid of fields for configuration:

Field Name	Field Type
Opportunity Category:	Text box with dropdown arrow
Opportunity BTT Type:	Dropdown menu
Opportunity Source:	Text box with dropdown arrow
Opportunity Sales Stage:	Dropdown menu
Opportunity Type:	Dropdown menu
Decision Date (# of days to close):	Text box
Opportunity ISA:	Text box with dropdown arrow
Sales Team Member 1:	Text box with dropdown arrow
Sales Team Member 2:	Text box with dropdown arrow
Sales Team Member 3:	Text box with dropdown arrow
Sales Team Member 4:	Text box with dropdown arrow
Sales Team Role 1:	Dropdown menu
Sales Team Role 2:	Dropdown menu
Sales Team Role 3:	Dropdown menu
Sales Team Role 4:	Dropdown menu

Can Default Opportunity values be changed??

- Although you specify default opportunity values, you do have the ability to override default field values in all the fields *with one exception!*

“Opportunity Source”

If you specify a default Opportunity Source value, that source becomes the primary source of your opportunities and when creating new opportunities, if you enter another Opportunity Source value it becomes the secondary source.

Tip: Setting up a Default Opportunity Source should **only** be done if your opportunity source is **always** the same.

R7.5 - Setting Key Opportunity Defaults

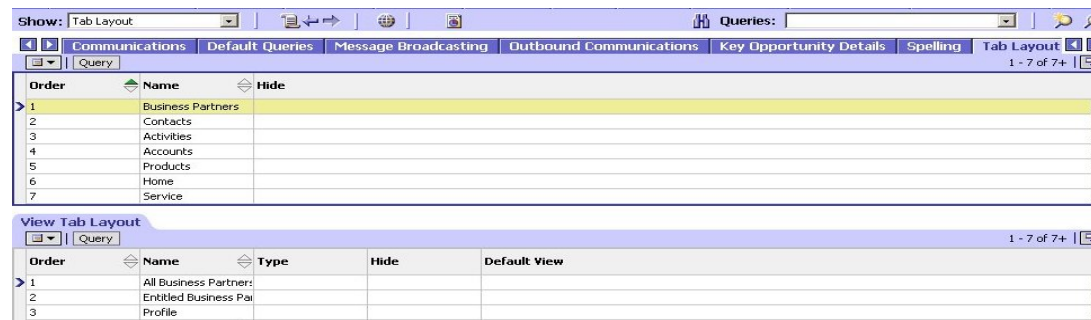
- View -> User Preferences ->Key Opportunitiy Details
- Simplifies opportunity creation by setting defaults for certain fields
 - ▶ Category
 - ▶ Source - note: can not be changed in the opportunity so only set source as default if the source is always the same, e.g., telesales
 - ▶ Opportunity Type
 - ▶ Opportunity ISA
 - ▶ Opportunity BTT Type
 - ▶ Opportunity Sales Stage
 - ▶ Decision Date (# of days to close)
 - ▶ Four team members and their roles - key them once and they are added to every opportunity you create!

The screenshot shows the 'User Preferences' dialog box in the IBM CRM application, specifically the 'Key Opportunity Details' tab. The dialog is titled 'Key Opportunity Details' and has a menu bar with 'File', 'Edit', 'View', and 'Help'. Below the menu bar is a toolbar with 'New', 'Delete', 'Query', 'Copy', and 'Cancel' buttons. The main area contains several fields for setting defaults:

Opportunity Category:	Opportunity BTT Type:	Sales Team Member 1:	Sales Team Role 1:
Opportunity Source:	Opportunity Sales Stage:	Sales Team Member 2:	Sales Team Role 2:
Opportunity Type:	Decision Date (# of days to close):	Sales Team Member 3:	Sales Team Role 3:
Opportunity ISA:		Sales Team Member 4:	Sales Team Role 4:

Customizing your Screen/View Tabs (Blue Function Tabs)

- Click **View** on the Menu bar
- Click **User Preferences**
- Scroll down and click **Tab Layouts**. The Tab Layouts window is displayed. The List applet shows the order that the screen tabs are displayed.
- To move Opportunities from the 5th screen tab to the 1st screen tab, click in any Opportunities field.
- In the Order field, press Delete and then type 1. Number 1 is displayed in the Order field for Opportunities.
- In the Order field for Activities, press Delete and then type 2. Number 2 is displayed for Activities.
- Click the ascending sort button in the column header. The Opportunities screen tab moves to number 1 and Activities screen tab moves to number 2.

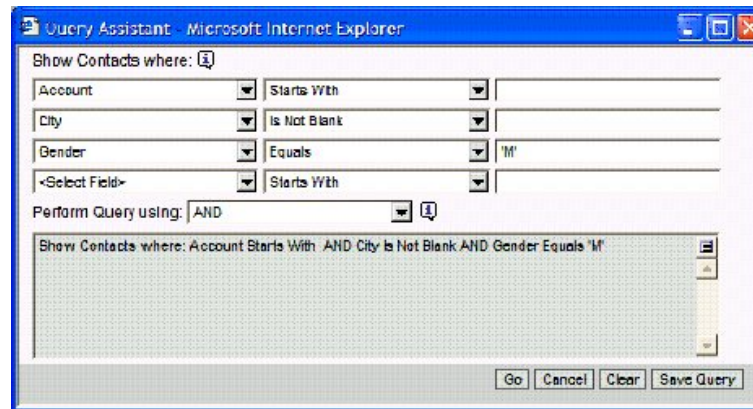


Query Assistant - It's Easy!

- Users can find data without using query syntax by selecting a field, selecting operators, and completing in the match statements in the query assistant. To use the query assistant:
- Click the Query button in any list applet to find your reports. The applet is cleared and the Query Assistant button is displayed.
- Click the Query Assistant button to access the tool. The Query Assistant window is displayed

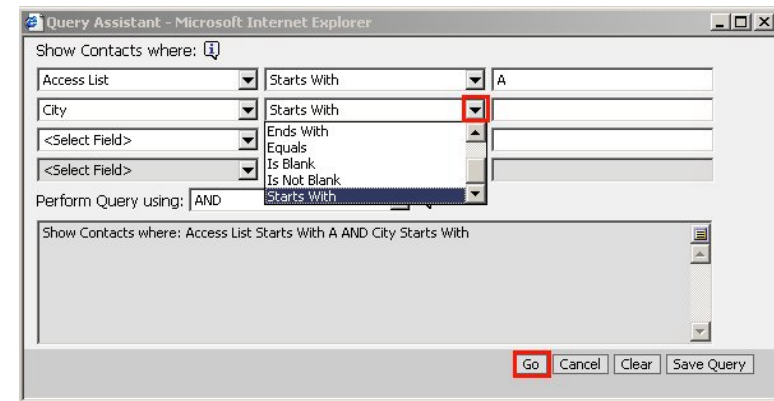


- Complete one or more criteria for the query in the Query Assistant window, and then click Go.



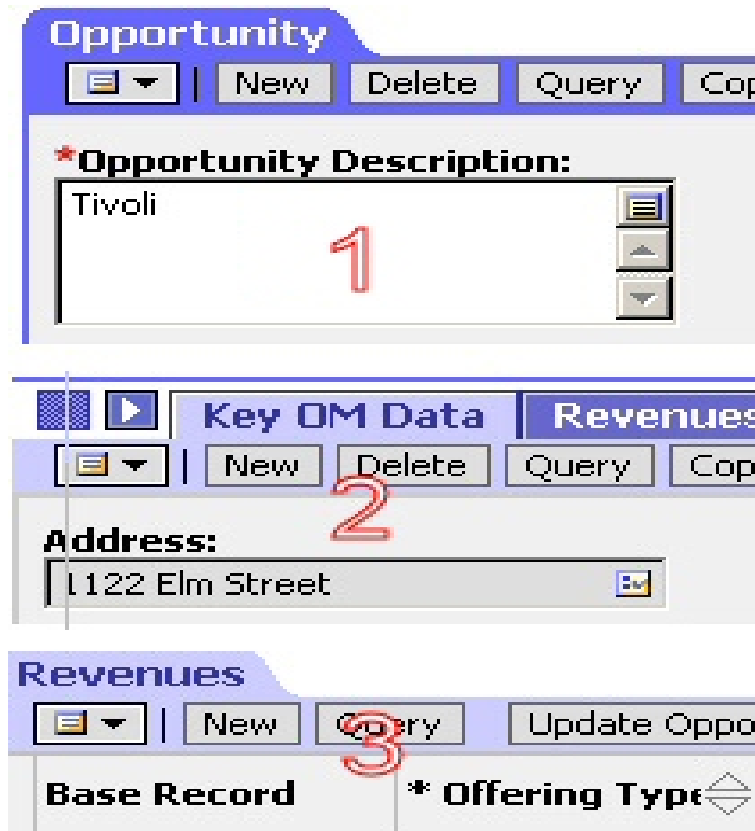
Query Assistant, continued

- After accessing the Query Assistant:
 - ▶ Select the field you want to query on.
 - ▶ Press Tab to move to the middle column.
 - ▶ Select the find command you want to use.
 - If you use the Equal command, it is case specific.
 - If you use the Contains function, it is NOT case specific
 - Press Tab to move to the last column.
 - ▶ Type a partial or complete name, ID, amount, date, or other information that is included in the record or set of records you are querying.
 - ▶ Complete the query operator field and record inclusion fields to add other query criteria.
 - ▶ Click Go. The query results are displayed.
 - ▶ Tip: **BIG NEWS!!** With Query Assistant, you have the choice to run either case sensitive or case insensitive queries.
 - ▶ Note: To refresh the fields in the Query Assistant window, click Clear.



R7.5a - New fields, icons, hyperlinks, and applets

- The **Key OM Data** view has been added to the **Opportunities** screen. All required fields for creating a new opportunity or updating an existing opportunity are displayed in the **Opportunities** screen, **Key OM Data view**.
- In this view, the **Revenues** applet is the third applet.

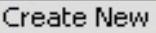
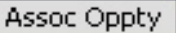


R7.5a - New fields, icons, hyperlinks, and applets

- When you update the sales stage, the following fields are displayed in the **Key OM Data** view:
 - Detailed Revenue Data
 - Opportunity ISA
 - Opportunity Conditions of Satisfaction
 - Install Base being Replaced

The screenshot shows the 'Key OM Data' view of an opportunity. The fields are organized into a grid. The left column contains address-related fields: Address (1122 Elm Street), City (Atlanta), Country (United States), Postal Cd (30339), and State (GA). The middle column contains financial and sales-related fields: Detailed Revenue Data (highlighted), Sales Stage History (01-Noticing), Opportunity ISA (highlighted), and Total Deal Value. The right column contains relationship-related fields: Install Base being Replaced (highlighted), ISV Alliances, System Integrators/Other BPs, Business Partner Roles, and Noticer Name (Allen, Louwen). The 'Create New' and 'Assoc Oppty' icons are visible at the top of the form.

Opportunity applets now display the complete name. In the **Oppty Owner (OO)**, **Oppty Identifier (OI)**, and **Oppty Noticer (ON)** applets, **Last Name**, **First Name**, and **MI** fields are displayed.

The **Create New** icon   is displayed in the **Account** screen, **Opportunities** view and the **Contact** screen, **Opportunity** view. The **Assoc Oppty** icon is displayed in the **Contact** screen, **Opportunity** view.

- **Create New** enables you to add a new opportunity
- **Assoc Oppty** enables you to associate an opportunity to a contact

R7.5a - New fields, icons, hyperlinks, and applets

- Toggle applets in the Key OM Data view have replaced all SmartScripts for completing Opportunity field validations.

Example: Change the sales stage of an opportunity from 03-Identified/Validating to 05-Qualified/Gaining Agreement.

Before the sales stage is changed, notice that **Detailed Revenue Data, Opportunity ISA, Opportunity Conditions of Sat, and Install Base being Replaced** are not required fields.

*Total Opportunity Revenue: \$85,000.00

*Opportunity Probability: 75%

*Sales Stage: 03-Identified/Validating

Activities | Key OM Data | Attachments | Service Requests | Categories

Cancel Assign

*Detailed Revenue Data:

Sales Stage History: 03-Identified/Validating

*Opportunity ISA:

Total Deal Value:

*Opportunity Conditions of Sat:

*Install Base being Replaced:

ISV Alliances:

System Integrators/Other BPs:

Business Partner Roles:

Noticer Name: Allen, Louwen

*Total Opportunity Revenue: \$85,000.00

*Opportunity Probability: 75%

*Sales Stage: 05-Qualified/Gaining Agreement

Activities | Key OM Data | Attachments | Service Requests | Categories

Cancel Assign

*Detailed Revenue Data:

Sales Stage History: 03-Identified/Validating

*Opportunity ISA:

Total Deal Value:

*Opportunity Conditions of Sat:

*Install Base being Replaced:

ISV Alliances:

System Integrators/Other BPs:

Business Partner Roles:

Noticer Name: Allen, Louwen

After the sales stage is changed, the toggle applet is displayed in the **Key OM Data** view, and those fields are now required.

R7.5a - New fields, icons, hyperlinks, and applets

- In the **User Preferences** for the **Key Opportunity Defaults**, the following fields are new **Opportunity** defaults:
 - **Owning Organization**
 - **My Sales Team Role** (In CRM Siebel 7.5, you could select the roles for the team members. In CRM Siebel 7.5a, you can select your role, too.)
 - **Sales Team Member 5, 6, 7, and 8** (The number of **Sales Team Member** fields has increased from 4 to 8.)
 - **Revenue defaults**
- The new **Revenue** defaults are **Offering Type (Level 10)** and **Brand Code (Level 20)**.

The screenshot displays the Siebel CRM User Preferences interface for 'Key Opportunity Defaults'. The window title is 'User Preferences' and the current view is 'Key Opportunity Defaults'. The interface is organized into several sections:

- Opportunity Defaults:** Includes fields for Opportunity Source, Opportunity Type (Single Brand Components), Opportunity ISA, Opportunity BTT Type (1), Opportunity Sales Stage (03-Identified/Validating), Decision Date (# of days to close), Owning Organization, Opportunity Category (GKO:Geo - Key Opportunity), and My Sales Team Role (Client Representative).
- Sales Team Members:** Lists Sales Team Member 1 through 8, each with a selection field. Sales Team Member 5, 6, 7, and 8 are highlighted with a red box.
- Sales Team Roles:** Lists Sales Team Role 1 through 8, each with a selection field. Sales Team Role 1 and 2 are highlighted with a red box.
- Revenue Defaults:** Includes Offering Type (Level 10) (Systems - Major Group) and Brand Code (Level 20) (Storage Software), both highlighted with a red box.

R7.5a - New fields, icons, hyperlinks, and applets

The following new **Revenue** fields are for product data capture:

- **Level 10** (Offering Type) on Revenue BC uses product assoc applet, but only displays level 10 products.
- **Level 20** (Brand Code) on Revenue BC uses product assoc applet, but only displays level 20 products.
- **Level 30** only displays level 30 products. If a level 10 or 20 value is entered, the 30 values that display are bounded, which means only the level 30 products that go with the 10 and 20 value are displayed because they filtered; otherwise, it shows all values at level 30.
- **Level 40** (Machine Type/Model) on Revenue BC that uses product assoc applet, but only displays level 40 products. It is bounded if a level 10, 20, or 30 value is entered; otherwise it shows all values at level 40.

The screenshot shows the 'Key DM Data' tab in the software. The 'Revenues' section is active, displaying a table of revenue records. A red box highlights the columns: * Bill Date, * Offering Type (Level 10), Brand Code (Level 20), Product (Level 30), and Machine Type/Model (Level 40). The table contains one record with a checkmark in the 'Base Record' column.

Base Record	* Bill Date	* Offering Type (Level 10)	Brand Code (Level 20)	Product (Level 30)	Machine Type/Model (Level 40)	* Periodic Qty	Pric
✓	2/27/2004	Systems - Major Group	eServer: iSeries	iSeries - Large Servers		2	\$60,000.00

R7.5a - New fields, icons, hyperlinks, and applets

- The **My Activities** section of the CRM Siebel home page contains hyperlinks for opportunity numbers.

The screenshot shows the CRM Siebel home page interface. At the top, there is a menu bar with options: File, Edit, View, Help. Below this is a navigation bar with tabs: Business Partners, Contacts, Accounts, Activities, Products, Home, Service, and Employ. A 'Show:' dropdown menu is visible, along with several icons for navigation and search.

The main content area starts with a 'Home:' section featuring a welcome message: 'Welcome Back Relationship Rep. Today is Friday, October 08, 2004.' Below this, there are two sections: 'My Service Requests' and 'My Activities'. The 'My Activities' section is highlighted with a red box around the 'Oppty Num' column in the table below.

New	SR #	Summary	Account	Priority
*		Activity for BTT1 SBC SS1		
*		Activity for BTT1 SBC SS2		

New	Type	Description	Oppty Num	Priority
*	To Do	Activity for BTT1 SBC SS1	1-7TSBEO	
*	To Do	Activity for BTT1 SBC SS2	1-7TSBEO	

R7.5a - Process improvements

Assigning a new primary

When a new primary is added to the team, the open activities that were assigned to the previous primary are automatically reassigned to the new primary.

Changing the sales stage

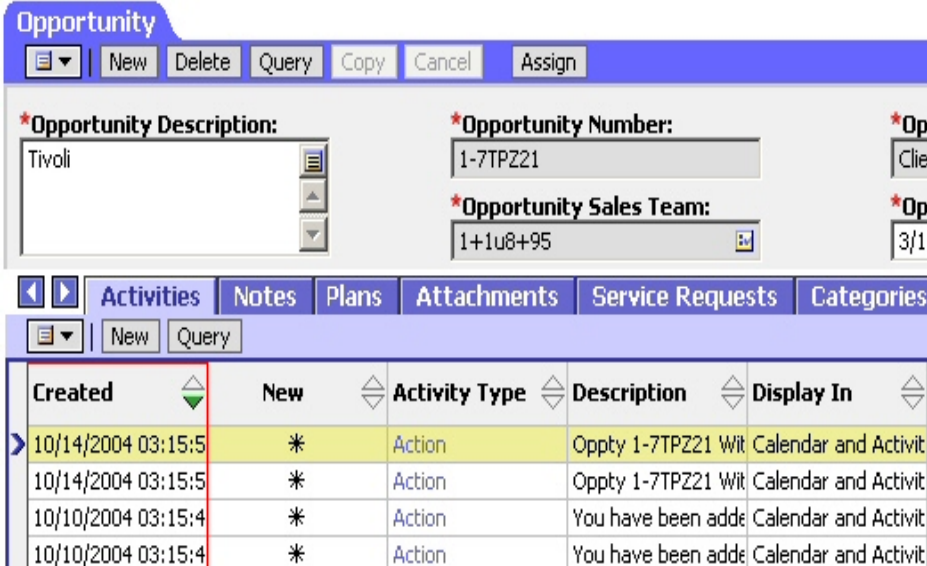
When a sales team member changes the sales stage (regardless of the person's position on the team), the mandatory activities that are generated by the sales stage change are automatically assigned to the Opportunity Owner in all scenarios. These activities were previously assigned to the person who changed the sales stage. This process change also applies to skipped sales stages.

Sorting activities and notes

In the **Opportunities** screen, **Activities** view and the **Opportunities** screen, **Notes** view, the activities and notes with the most recent create date are listed first.

Conclusion

This concludes the presentation. For more information, click [CRM WorkSmart](#), your internal source for CRM information.



The screenshot displays the 'Opportunity' record for 'Tivoli' with the following details:

- Opportunity Description:** Tivoli
- Opportunity Number:** 1-7TPZ21
- Opportunity Sales Team:** 1+1u8+95

The 'Activities' view shows a list of activities sorted by creation date (most recent first):

Created	New	Activity Type	Description	Display In
10/14/2004 03:15:5	*	Action	Oppty 1-7TPZ21 Wit	Calendar and Activit
10/14/2004 03:15:5	*	Action	Oppty 1-7TPZ21 Wit	Calendar and Activit
10/10/2004 03:15:4	*	Action	You have been adde	Calendar and Activit
10/10/2004 03:15:4	*	Action	You have been adde	Calendar and Activit

Creating a new opportunity

- Find the right account.
- Find the right contact.

Tip: Go to the [WorkSmart](#) Website to view and/or print the CRM Siebel Quick Reference cards, including the *Working with Business Partners on New Opportunities Quick Reference* card.

Create and Update Opportunity Records

- **Lead Ledger Linkage: Provide the valid opportunity number with the order**
 - Must have a valid opportunity number
 - Appear in Pipeline/EDGE reports
 - Product must match (Brand Level, such as iSeries or Storage hardware)
 - Enter at least Product Level 20
 - Customer must match
- **Ensure to code Sales Play opportunities using Category/Category Value**

Coding for Systems Sales Plays 2005

- **For ALL Systems Sales Plays, a Category/Category Value must be entered in 2005:**
 - This is a change, we will no longer be using tactic code as 2nd source to code Systems Sales Plays as we did in 2004.

To enter a Category/Category Value for Systems Sales Plays:

- From **Categories Tab**, click **New**
- Click on **Category** field, then **MVG icon**
- Select appropriate **Systems Sales Play Category**; highlight and **PICK**
- Then click on **Category Value** field, then **MVG icon**
- Select appropriate **Systems Sales Play Category Value**; highlight and **PICK**

Collaborate with Other Sales People – SOSWOS More!

- **Client Reps**
- **Sales Specialists on all products being offered to the customer**
 - Server, Storage, Software, IBM Global Services
- **Business Partners**
- **ibm.com**
- **Technical Sales Support**
 - Assigning to and Tracking Activities directly with Field Technical Sales Support (FTSS)
 - Tracking the Status of your Service Requests to Techline

Assigning to and Tracking Activities directly with Field Technical Sales Support (FTSS) Team

- **Need a Solution Assurance, a configuration, a proof of concept, or another activity to help you close a sale?**
 - Your FTSS teams wants to help you.
 - Engage and communicate with your ITS, ITA, etc., using CRM Siebel instead of e-mail or phone calls.
- **Delegate tasks to an FTSS team member, simply:**
 - Create an Activity and assign it to them, AND
 - Add them to the Opportunity Sales Team, so they can:
 - Attach documentation directly to the Opportunity
 - Document their Activities in CRM Siebel for you
 - Any Sales Team member can check on the status of these delegated Activities and use their Attachments, saving you extra phone calls and e-mails.

❖ Try it at: http://igc31cont.boulder.ibm.com/courses/wbt/ibm/crmfs01/external/ftss_assign_act/guideme.htm

Tracking your Service Requests to Techline

- **Follow the status of requests to Techline directly in CRM Siebel.**
 1. Enlist help from Techline as usual.
 2. Provide them with the Opportunity number.
 3. Watch for an e-mail confirmation from Techline which includes the reference number of your Service Request.
 4. View the status of the Service Request directly in CRM Siebel.
 - Find out who's working the request, check for results, etc.
 - Saves you phone calls and e-mails = time and money.

❖ Try it at: http://igc31cont.boulder.ibm.com/courses/wbt/ibm/crmfs01/external/ftss_search_sr/guideme.htm

You Should Now Be Able To:

- Use CRM Siebel to:
 - Take advantage of the R7.5 and R7.5a usability and functionality enhancements including:
 - Opportunity Management Simplification
 - Improvements to Process and advancing the Sales Stage
 - Create and update opportunity records and help you manage your pipeline
 - Collaborate with other sales people, including Client Reps, Sales Specialists, Business Partners, ibm.com, and Technical Sales Support – SOSWOS!

Now Go Use It!

- **Use CRM Siebel rather than e-mail to engage other sales team members on an opportunity**
- **Make notes in CRM Siebel to keep up with conversations with the customer**
- **Attach documents to the opportunity to share with other team members**
 - Configuration
 - Proposal

Additional Resources

- **CRM Worksmart, your internal source for CRM Information:**

- <http://w3-03.ibm.com/transform/crm/crmsite.nsf/public/quote>
- Save this as a favorite!

- **What is new in CRM Siebel Release 7.5a:**

- http://w3-03.ibm.com/transform/crm/crmsite.nsf/public/75a_new
- Includes presentation, simulations, Quick Reference Cards, and MORE!

- **On-line help in CRM Siebel**

- Click on Help.....Contents
- Click on “Sales” Tab
- In the left navigation panel, click on “Topics for Field Sales” or “Topics for ibm.com”

End Of Presentation

Trademarks

The following are trademarks of the International Business Machines Corporation in the United States and/or other countries. For a complete list of IBM Trademarks, see www.ibm.com/legal/copytrade.shtml: AS/400, DBE, e-business logo, ESCO, eServer, FICON, IBM, IBM Logo, iSeries, MVS, OS/390, pSeries, RS/6000, S/30, VM/ESA, VSE/ESA, Websphere, xSeries, z/OS, zSeries, z/VM

The following are trademarks or registered trademarks of other companies

Lotus, Notes, and Domino are trademarks or registered trademarks of Lotus Development Corporation
Java and all Java-related trademarks and logos are trademarks of Sun Microsystems, Inc., in the United States and other countries
UNIX is a registered trademark of The Open Group in the United States and other countries.
Microsoft, Windows and Windows NT are registered trademarks of Microsoft Corporation.
SET and Secure Electronic Transaction are trademarks owned by SET Secure Electronic Transaction LLC.
Intel is a registered trademark of Intel Corporation
* All other products may be trademarks or registered trademarks of their respective companies.

NOTES:

Performance is in Internal Throughput Rate (ITR) ratio based on measurements and projections using standard IBM benchmarks in a controlled environment. The actual throughput that any user will experience will vary depending upon considerations such as the amount of multiprogramming in the user's job stream, the I/O configuration, the storage configuration, and the workload processed. Therefore, no assurance can be given that an individual user will achieve throughput improvements equivalent to the performance ratios stated here.

IBM hardware products are manufactured from new parts, or new and serviceable used parts. Regardless, our warranty terms apply.

All customer examples cited or described in this presentation are presented as illustrations of the manner in which some customers have used IBM products and the results they may have achieved. Actual environmental costs and performance characteristics will vary depending on individual customer configurations and conditions.

This publication was produced in the United States. IBM may not offer the products, services or features discussed in this document in other countries, and the information may be subject to change without notice. Consult your local IBM business contact for information on the product or services available in your area.

All statements regarding IBM's future direction and intent are subject to change or withdrawal without notice, and represent goals and objectives only.

Information about non-IBM products is obtained from the manufacturers of those products or their published announcements. IBM has not tested those products and cannot confirm the performance, compatibility, or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products.

Prices subject to change without notice. Contact your IBM representative or Business Partner for the most current pricing in your geography.

References in this document to IBM products or services do not imply that IBM intends to make them available in every country.

Any proposed use of claims in this presentation outside of the United States must be reviewed by local IBM country counsel prior to such use.

The information could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. IBM may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time without notice.

Any references in this information to non-IBM Web sites are provided for convenience only and do not in any manner serve as an endorsement of those Web sites. The materials at those Web sites are not part of the materials for this IBM product and use of those Web sites is at your own risk.