Oracle Sales Cloud

Fixed Scope Offering

from

Filix Consulting Pvt. Ltd.

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ORACLE® Gold Partner

Oracle Consulting Practice at Filix

Business Transformation and Oracle Solutions Partner headquartered in New Delhi

Oracle Gold Partner with expertise in both Cloud & On-premise applications

Oracle Growth Partner (2010) **Specialized Innovation Partner** (2012)

100+ member Consulting Practice team

Expertise across Nine Business Verticals

Customers spread across Nine India states

Industry specific ready-made Bolt-on solutions

Infra partners: IBM & Netmagic (On-premise & Cloud)

Professional Implementation & Support services

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Key features

- Key Business Objectives
- Key Differentiators
- Business function coverage
- Deployment options
- In Scope
- Out of Scope
- Key assumptions
- Project Deliverables
- Project Team structure
- Responsibilities
- Project Plan – High level
- Implementation approach
- Pricing structure

Key Business Objectives

- ❑ Enable adoption of leading best business practices by the Sales force
- ❑ Maximize Sales force productivity using mobility capabilities and user-friendly User Interface
- ❑ Minimize overall "Sales Cycle" & "Latency Periods"
- ❑ Enable informed decision-making using improved business visibility through powerful dashboards
- ❑ Improve sales planning and revenue forecasting by utilizing the power of the Sales funnel
- ❑ Enable improved lead qualification leading to improved revenue potential
- ❑ Empower Sales Team with Anytime, Anywhere capabilities
- ❑ Optimize Sales performance using territory modeling & quota planning
- ❑ Quick deployment and User adoption of the software solution to enable quick ROI

Key Differentiators

❑ Customer centric engagement model

❑ Predictable deployment cost and timelines

❑ Domain expertise in Sales & Marketing business transformation

❑ Change management skills

❑ Dedicated team of Oracle Sales Cloud certified Consultants

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Business function coverage

Business functions	Oracle Product
Lead, Opportunity & Activity Management	Core Sales Force Automation (SFA)
Sales Territory Management	Territory Management
Sales Quota Management	Quota Management
Customer Data Management	Customer Data Management
(MS Outlook integration for off-line access)	Oracle Sales Cloud for Outlook
(User Interface for Smart phones)	Oracle Sales Cloud Mobile App
Sales Call Reporting	Oracle Sales Cloud Call Report App
Business Analytics	Sales Analytics
Salesperson Incentive Compensation Mgmt.	Incentive Compensation
Graphical Product grouping for Sales Promotions	Sales Catalogue
Sales prediction modelling	Sales Predictor
Channel Partner Management	Partner Relationship Management

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Deployment options

Oracle Sales Cloud Product	Implementation package / Deployment option		
	Option 1	Option 2	Option 3
Core Sales Force Automation	■	■	■
Territory Management	■	■	■
Quota Management	■	■	■
Customer Data Management	■	■	■
Oracle Sales Cloud for Outlook	■	■	■
Oracle Sales Cloud for Mobile App	■	■	■
Oracle Sales Cloud Call Report App	■	■	■
Sales Analytics	■	■	■
Oracle Social Network		■	■
Sales Catalogue			■
Sales Predictor			■
Incentive Compensation			■
Partner Relationship Management			■
Project timeline	**8 Weeks**	**10 Weeks**	**12Weeks**

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In-Scope

Item	Remarks
Project office	Project would be executed centrally from the designated Project office
Enterprise structure	Configuration for a maximum of One Legal Entity and two Business Units would be part of the standard offering. (Additional ones would be done on chargeable basis)
Country	Configuration for one country would be part of the standard offering (Additional ones would be done on chargeable basis)
Language	English (Additional languages would be done on chargeable basis
Process	Business Process Review would be done to identify gaps with standard business practice. (Client Project Management would have to decide on the Customizations required)
Oracle product implementation	Deployment of Oracle Products as per the selected Deployment Option (Option 1 / 2 / 3)
Data migration	Data migration in "As-Is Where-Is" basis provided on Filix provided data templates
Reports	Configuration of up to 10 reports would be within the scope of the standard offering. Additional reports would be on chargeable basis
User Training	User trainings on the applicable Oracle Products would be imparted to the Client Project Core team members only, based on Train-The-Trainer concept

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Out of Scope

Item	Remarks
Data preparation	Data preparation by Filix Team would be out of scope
Integration (with Oracle Product)	Integration with any Oracle Product which is not available out-of-the-box
Integration (with TPA)	Integration with any Third Party Application (TPA) which is not available out-of-the-box
Hardware	Availability / Maintenance of Hardware is not included in the scope of work
Networking	Availability of Network equipment and Networking issues are not included in the scope of work

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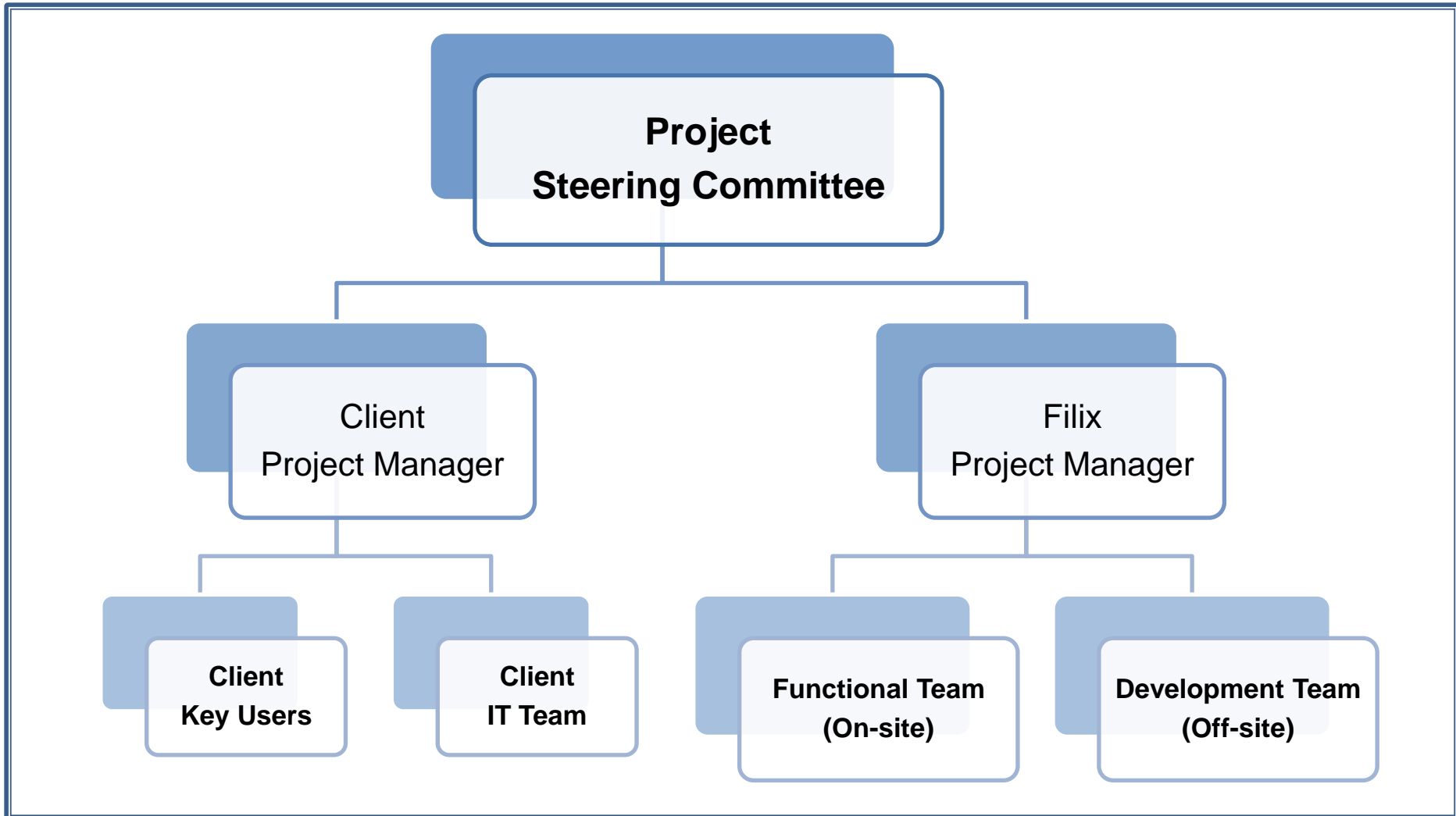
Key assumptions

✓Standard business flows and Oracle standard functionality would be the base for the implementation.

✓Configuration of the standard system is performed without customizations.

✓"Train-the-Trainer" approach would be followed for training of end users by the key users.

✓Organizational Change Management will be client's responsibility.

✓Timely review and feedback on gaps in the configured system w.r.t. to the Business process blueprint document would be ensured by client, to facilitate project progress.

✓Adherence to the defined Project engagement scope would be client's responsibility and contractual cover would be provided for any budget or time overruns

✓Data provisioning in timely manner on Filix provided data templates would be client's responsibility.

✓Part of the configuration / development activities would be carried out off-site.

Project deliverables

➢ Business Process Review report

➢ Conference Room Pilot (CRP)

➢ Training of Key users ("Train the Trainer" approach)

➢ User Acceptance Testing (UAT)

➢ Data migration

➢ Go-Live

➢ Post Go-Live Support

Project Team structure

Project
Steering Committee

Client
Project Manager

Filix
Project Manager

Client
Key Users

Client
IT Team

Functional Team
(On-site)

Development Team
(Off-site)

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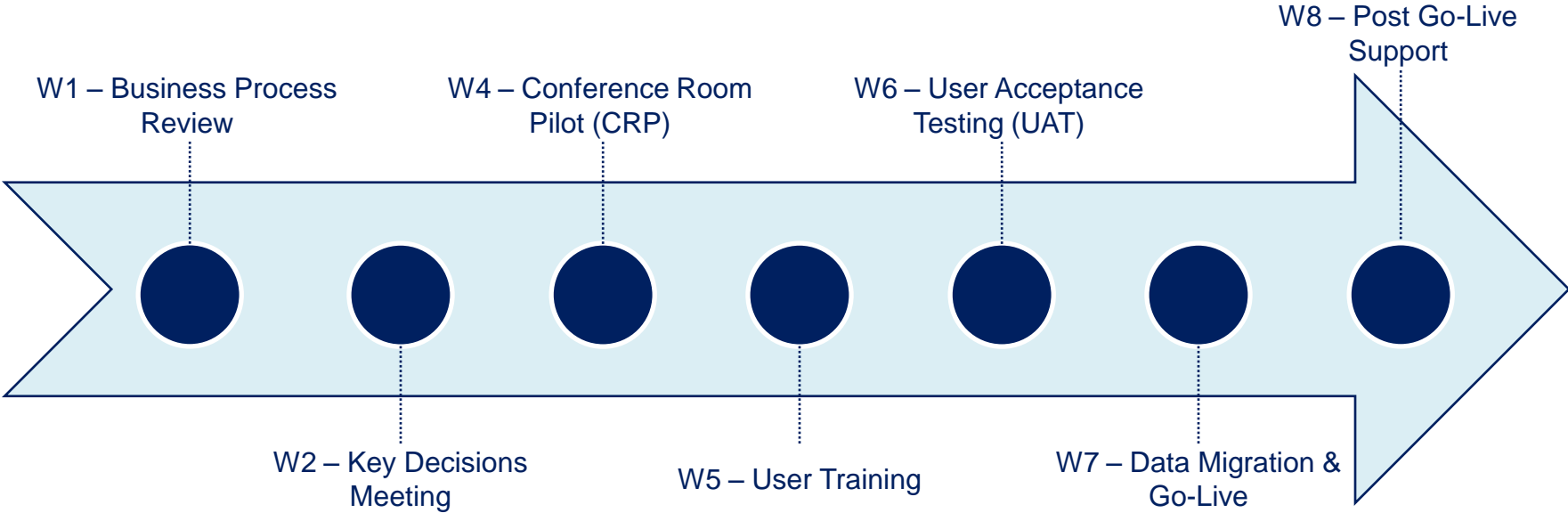# Responsibilities – Filix Project Team members

Team member	Responsibilities
Filix Project Manager	✓Main point of contact for Client team ✓Responsible for timely delivery of Project deliverables & Customer satisfaction ✓Responsible for coordination of all project activities with Client team and for organizing required Filix resources during the Project ✓Responsible to ensure that the Project is executed as per the scope of work defined in the agreed Contract terms (with requisite approval from Filix senior management team in case of Scope creep)
Functional Consultant	✓Configuration design of the solution ✓Responsible for coordination and execution of all activities related to implementation ✓Responsible for providing trainings to Client key users ✓Responsible for support to key users for system adoption ✓Responsible for support to key users for data migration ✓Responsible for understanding & compilation of requirements on Reports &Dashboards ✓Responsible for approval of Reports & Dashboards from relevant Client key users
Development Team member	✓Responsible for development & testing of Reports & Dashboards ✓Responsible for incorporating feedback / corrections ✓Responsible for deployment of the tested Reports & Dashboards

Oracle Sales Cloud FSO

Responsibilities – Client Project Team members

Team member	Responsibilities
Client Project Manager	✓Main point of contact for Filix team ✓Overall Project coordination and decision making ✓Ensuring availability of Client project team members for business discussions ✓Timely testing and feedback on the configured application ✓Timely sign-off of Project deliverables
Key Users	✓Providing business process briefing to Filix Team through active participation ✓Sharing of relevant documents, such as manuals, report formats etc. with Filix team ✓Data provisioning on Filix provided data templates ✓Attending training sessions and getting self-trained for training end users
IT Team member	✓Availability of hardware & networking requirements to Filix & Client Project team members

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Project Plan for Option 1
(High level plan – 8 weeks)

W8 – Post Go-Live Support

W1 – Business Process Review

W4 – Conference Room Pilot (CRP)

W6 – User Acceptance Testing (UAT)

W2 – Key Decisions Meeting

W5 – User Training

W7 – Data Migration & Go-Live

Project Plan for Option 2
(High level plan – 10 weeks)

W10 – Post Go-Live Support

W1 – Business Process Review

W5 – Conference Room Pilot (CRP)

W7 – User Acceptance Testing (UAT)

W2 – Key Decisions Meeting

W6 – User Training

W9 – Data Migration & Go-Live
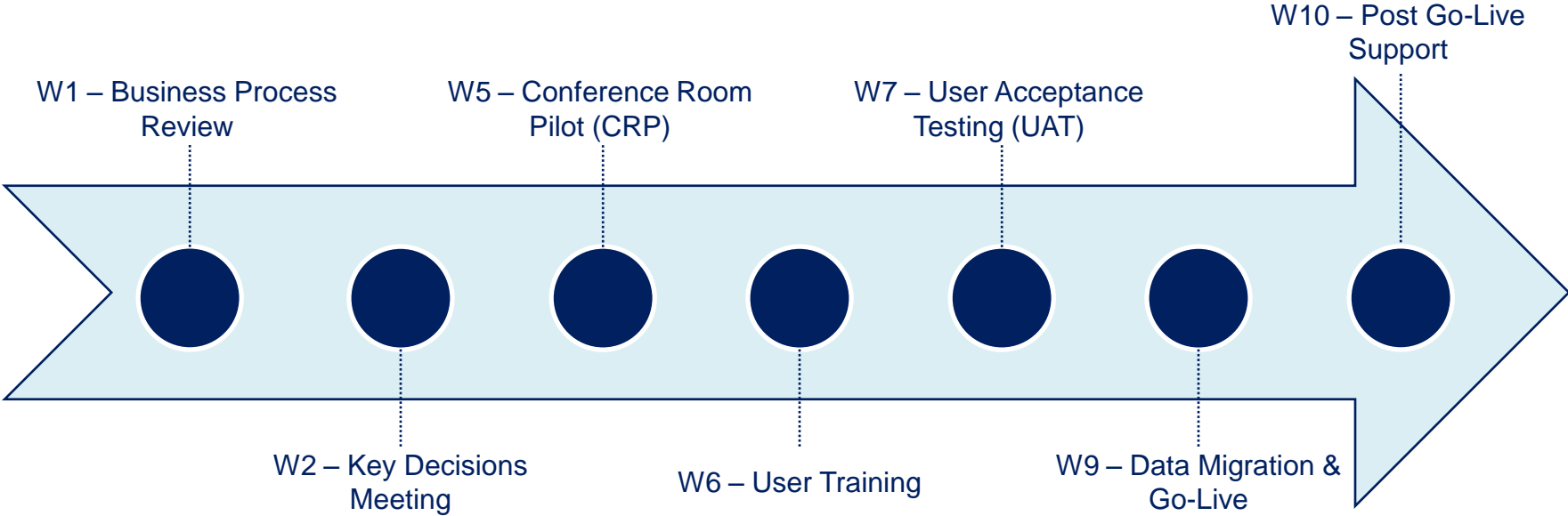
Project Plan for Option 3
(High level plan – 12 weeks)

W1 – Business Process Review

W2 – Key Decisions Meeting

W7 – Conference Room Pilot (CRP)

W8 – User Training

W10 – User Acceptance Testing (UAT)

W11 – Data Migration & Go-Live

W12 – Post Go-Live Support
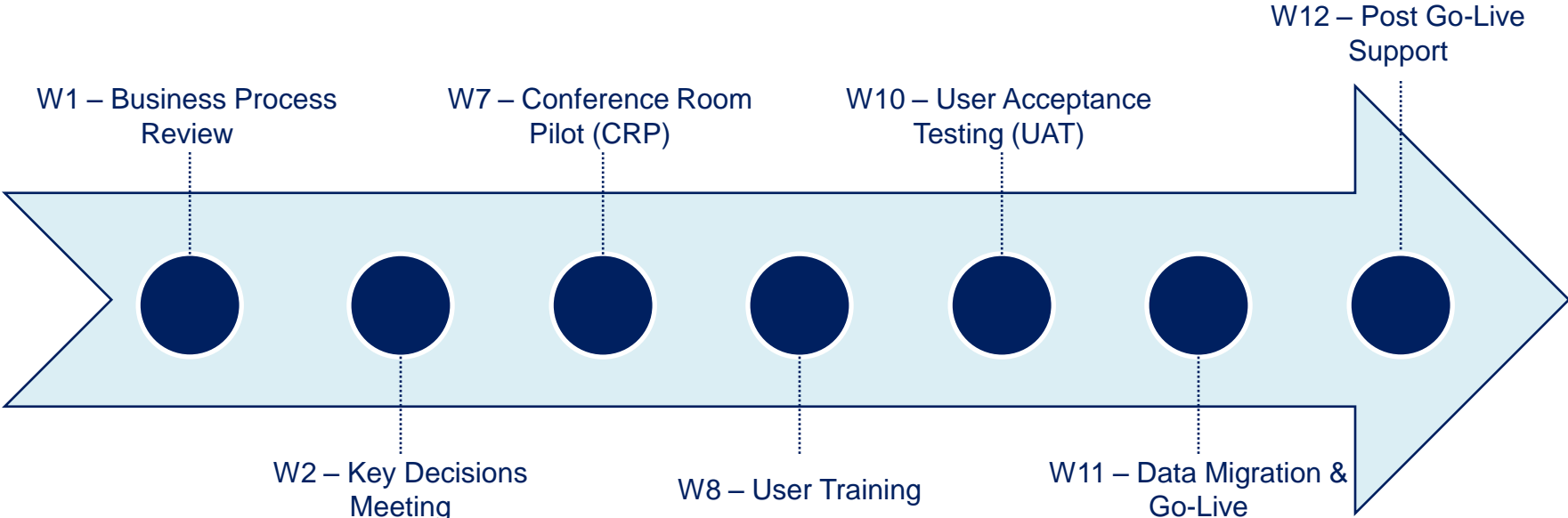
Implementation approach

Implementation approach

❑ **Business Process Review:**

Understand current business processes and document gaps w.r.t. standard business processes

❑ **Key Business Decisions Meeting:**

Discuss & document Customizations required

❑ **Conference Room Pilot (CRP):**

Demonstrate end-to-end business processes after configuration of the licensed Oracle Sales Cloud products

❑ **User Training:**

User training using "Train-The-Trainer" method to enable change management

❑ **User Acceptance Testing (UAT):**

User concurrence on the configured processes after testing by Key business users

❑ **Data migration**

Uploading of legacy data received from Client Project Team on pre-defined data templates
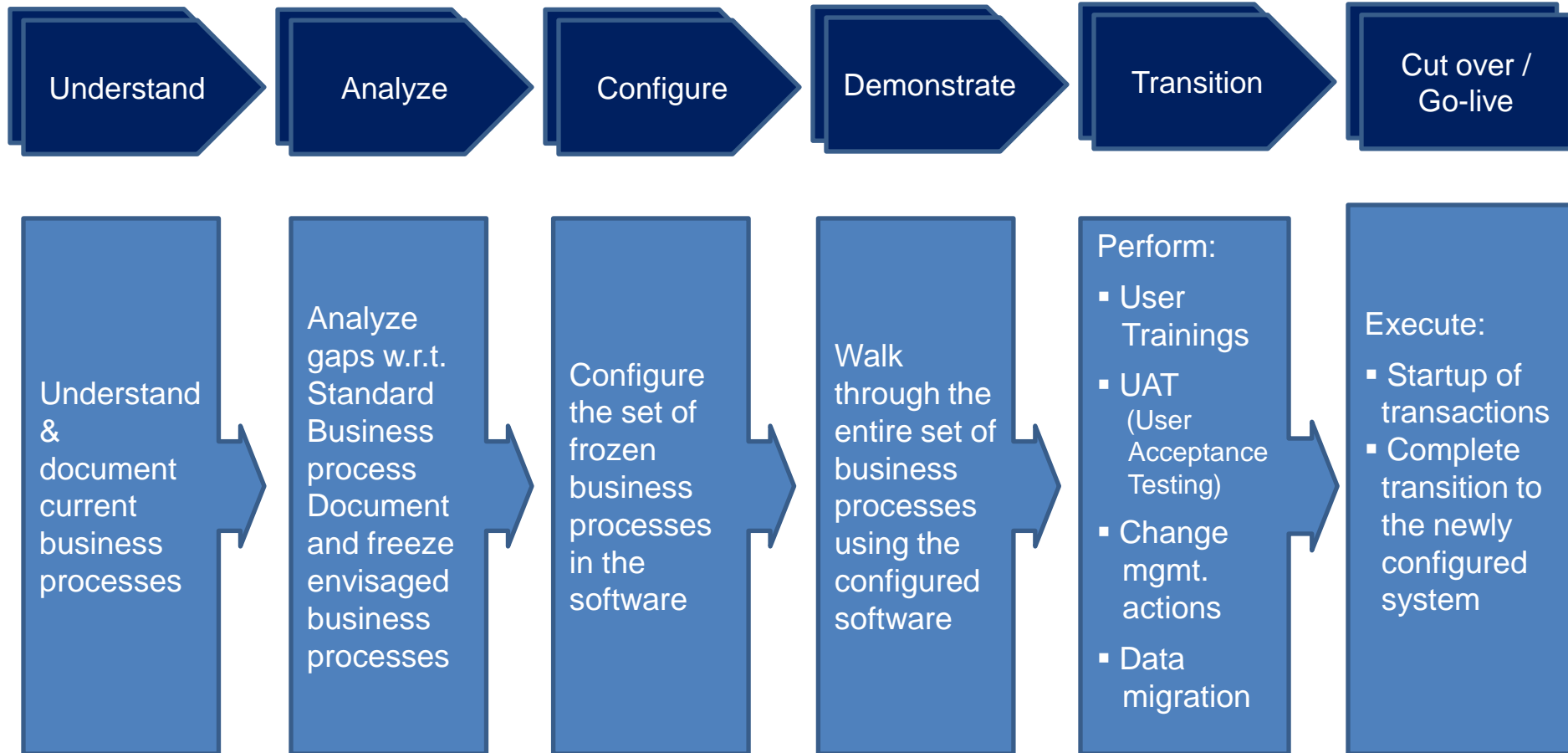
❑ **Cut-over & Production Go-live:**

Preplanned startup of transactions followed by complete transition to the newly configured system

❑**Post Go-live Support:**

Resolution of teething issues

Project plan** **based on above approach, finalized with Client Project Team at Project kick-off stage

Filix Project Implementation methodology

Understand	Analyze	Configure	Demonstrate	Transition	Cut over / Go-live

| Understand & document current business processes | Analyze gaps w.r.t. Standard Business process Document and freeze envisaged business processes | Configure the set of frozen business processes in the software | Walk through the entire set of business processes using the configured software | Perform:
▪ User Trainings
▪ UAT (User Acceptance Testing)
▪ Change mgmt. actions
▪ Data migration | Execute:
▪ Startup of transactions
▪ Complete transition to the newly configured system |

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Data migration methodology

Data preparation	Data cleansing	Data conversion	Cut over / Go-live

Data preparation:
- Identify data sources and owners
- Provide data collection templates
- Conduct training for data collection
- Identify data cleansing needs

Data cleansing:
- Provide cleansed data to Filix Team
- Compile clean data in given templates
- Conduct training for data cleansing
- Identify methods for data cleansing

Data conversion:
- Verify / Develop loading programs
- Test programs with sample data
- Perform loading on test instance
- Validate loaded data and test

Cut over / Go-live:
- Validate uploaded data
- Perform data loading activity
- Prepare live environment

Legends: Client responsibility   Filix responsibility

Pricing structure

Project pricing template

S.No.	Item	Price* (INR Lacs)
1	**OOTB (Out-of-the-box) Implementation services including:** a)Standard Implementation of the products as per selected Deployment Option (Option 1 / 2 / 3) b) Custom reports – 10 Nos. c) Post Go-Live support – One week	**xx** (Lumpsum basis)
2	**Product Customizations including Integrations which are not Out-of-the-box**	@ (On T&M basis)

Payment terms & conditions:

*Price quoted is exclusive of applicable taxes, as well as all travel, boarding and lodging expenses.

*Implementation price would be payable on milestone achievement as detailed below:

S.No.	Milestone	Payable
1	Team Mobilization Advance along with Purchase Order	25%
2	On sign-off of Business Process Review document	25%
3	On successful completion of UAT session	25%
4	On declaration of Go-Live	15%
5	On completion of Post Go-Live support period	10%

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Thank you

Look forward to service you soon ….

…. We are available at connect @filixconsulting.com