

MANAGING
the
SALES FUNNEL
with
ORACLE SALES CLOUD

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Change. It's never an easy process, especially when it comes to replacing one customer relationship management (CRM) tool with another after 12 years of use. But change is what the business decided it needed in order to leverage the data we had been collecting all those years.

Our previous system was housed on premises and had no integrations to our other systems. It was slow, difficult to navigate and data driven rather than graphical.

User adoption was at an all-time low across two business units. One business unit was hit or miss depending on the sales persons and their manager. The other business unit used the CRM as an expensive filing cabinet.

So, we evaluated several solutions, narrowed it down to three and went through an evolution process.

CRM System Requirements

Our sales team had recently gone through a sales transformation using the Miller Heiman sales methodology, so one requirement out of the gate was to integrate with Miller Heiman.

Another requirement was ease of use. The business wanted a simple navigation layout, including icons that could easily be recognized and used. We also wanted a graphical interface rather than a data-driven one. This would help with user adoption. The easier it is to enter and find data, the more benefit the sales team will get out of the system.

We also needed the system to be flexible to integrate with some of our existing systems, such as Oracle E-Business Suite (EBS), JD Edwards (JDE), Oracle Business Intelligence Enterprise Edition (OBIEE), Eloqua and the Incentive Compensation (OIC) module.



Also critical was reporting, something we were missing with our old CRM. We defined several reports and dashboards to be used by various parts of the business so we could finally get a 360-degree overall view of our end-to-end sales process cycle.

As it stood, we were collecting all this data but had no way to mine it, making it just a data collection exercise with no real business value for enhancing the bottom line.

Evaluating Oracle Sales Cloud

Some of the deciding factors that went into choosing Oracle Sales Cloud (OSC) were:

- Hosted environment.
- Simplified user interface (UI).
 - ♦ Ease of use/user adoption.
 - ♦ Customizable/integrations.
 - ♦ Responsiveness.
 - ♦ Oracle Social Network (OSN) for collaboration with any internal employee.
 - ♦ Mobile Apps.
 - ♦ BI dashboards/metrics.

Being able to deliver actual vs. plan metrics to the territory managers in a timely fashion would be critical, as well, for user adoption. Leveraging the OSN as our communication tool would facilitate quick decisions and reduce email traffic so the conversations were all in a single place for better visibility.

Some of our key goals were:

- Contact management.
- Communications execution, storage and archiving.
- Lead collection, distribution and dispensation (automated and timely).
- Deal strategy tracking/collaboration on strategic pursuits with scope.
- Call planning, tracking and collaboration.
- Business health/territory management.
- Key account planning and collaboration.

Many hours went into creating definitions so that when we were in meetings and setting expectations, everyone knew what an account meant, what a contact meant, what our sale stages were for opportunities and how the Miller Heiman process factored into our sales process.

Business Alignment

The very first step was to get the business to drive the new CRM/sales process. We needed the business to own the OSC roadmap. And laying out a strategic business roadmap for a three-month, one-year and five-year plan and setting expectations was crucial.

Fortunately, we had support and direction from the top down from our business unit. Members of the steering committee included:

- Executive Sponsorship from the Business:
 - ♦ President.
 - ♦ VP of Sales.
 - ♦ VP of Finance.
 - ♦ Director of Transformation.
 - ♦ Regional Managers.
 - ♦ Finance.
 - ♦ HR Comp Pay.
- Executive sponsorship from IT:
 - ♦ CIO.
 - ♦ VP of Development.
- Internal IT resources:
 - ♦ Project Management Office.
 - ♦ Commercial Development.
 - ♦ Data Warehouse Team (BI).

Deployment: What/How/When?

We used a phased process, scheduling and rolling out features in small, manageable activities in several intervals. It allowed the users to digest new information and build on what was previously rolled out.

The first phase was to migrate and validate any existing data from our old CRM system into OSC. The business decided to only pull data that was no more than a year old due to the fact that uses of the old system had waned over the years.

The next step was train, train and train again. We took a train-the-trainer approach and set up a weekly call line for questions and training opportunities. The business ran those calls with IT on the line or in the room to be the backup. The goal was to strengthen the businesses investment in the system.

Once the users started adding data through the simplified UI, we rolled out the Miller Heiman integration. The methodology uses several color-coded sheets that provide a deeper understanding of its intended object. The Gold Sheet, or Large Account Management Process (LAMP), is a hyperlink to the Miller Heiman system found on the account. It ties to the account and is used to provide a deeper dive into an account. We also provided hyperlinks to our internal OBIEE instance that links the account in OSC to an existing report in OBIEE, providing one place to see all related information of the account in question. Blue Sheets, Funnel Scorecard and Sales Process Funnel are all associated with an opportunity.

Up next was rolling out the Outlook integration as well as the mobile apps.





Now that there was data in the system to report on, we rolled out various reports, infolets and dashboards. Now the business could run reports in real time with ITs involvement or send reports or spreadsheets through the company's mail.

Saving the best for last, we rolled out the OIC module. This is really the defining piece of OSC from the end-user's perspective. Now they can see, live, how close or far from target they are at any point. The old way was once-a-month Excel spreadsheets that one person was responsible for sending to all participants, which was a very manual and time-intensive process.

We enlisted the help from the data warehouse group to provide transactional feeds that would get loaded into OIC nightly, monthly, quarterly or yearly, depending on the transaction or metric.

We automated this process, with the exception of a few manual loads.

Nothing Ventured, Nothing Gained

No project is without its challenges, and this one was no exception. I think two of the biggest issues we had were the revolving door of personnel and the lack of business ownership when it came to certain processes.

During the course of this project, we had four project managers, our VP of sales left the company and the director of transformation changed positions. There was also no business ownership of data management or territory management, which consumed a large portion of work for IT.

In addition, we had our fair share of technical issues. We deployed OSC 9 and had to upgrade to version 10 within a two-month time frame due to the upgrade schedule mandated by OSC.

Initial integration issues with our ERP were due to internal ports blocking our BPEL process to OSC due to this being the first version of the OSC/Miller Heiman integration. There also have been performance issues with reports and the simplified UI when it came to OIC. Some of the technical issues were issues with design, and some were issues that needed to be resolved by submitting an SR with Oracle Support.

Another challenge is dealing with Oracle Support. For the most part it's a smooth process: submit ticket, discuss, resolution provided, move on. On the more nuanced or complicated issues that cross functional areas, it can sometimes turn into its not our issues its whatever functional group applies the issue, and you must bring them all together for resolution. Leaning on your engagement manager from Oracle can help reduce the back and forth.

Results achieved:

- Centralized place for information and communication.
- Data and dashboards support decision making.
- Better management of leads and opportunities.
- Real-time view of the sales process.

Results

So, now that we are deployed, users are entering data, and dashboards are being used to help make strategic decisions related to how close we meet expectations.

Being able to go to one place to see all communications about an account or opportunity and to be able to see analytics surrounding the sales process has enabled the business to make better informed decisions. Having the marketing team leverage Eloqua to push out vetted leads to territory managers is helping us win business that could have potentially been missed. Being able to use the sales funnel to see, at any point, the stage of sales opportunities helps us focus on moving the sale forward. Having the actual vs. plan information from OIC readily available gives the territory manager a closer picture of where they need to focus. ♦



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