tmforum

Frameworx 12
Solution Conformance
Certification Report

Oracle

Rapid Offer Design and Order Delivery (RODOD) Solution

April 2013

Version 1.0.2

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1 Introduction

1.1 Executive Summary

This document provides details of Oracle's self-assessment and TM Forum's Conformance Assessment of **Oracle Rapid Offer Design and Order Delivery (RODOD) Solution**, against the following Frameworx 12 components:

- Business Process Framework Version 12

- Information Framework Version 12

The assessment included a review of:

- The methodology approach to process modeling against the TM Forum's Business Process Framework Release 12 according to the specific processes submitted in scope for the Assessment.

- Conformance to the Information Framework Release 12 Domains/Aggregate Business Entities according to the specific ABEs submitted in scope for the Assessment.

2 Solution Functionality/Capability Overview

2.1 Oracle RODOD Solution – Solution Description

Most communications service providers' services are growing in terms of complexity and sheer number, and they need to deliver their services through multiple-channels (e.g. customer care, Web, kiosk, sales force, retail store). Whether they are triple-play, quad-play, mobile, or Ethernet or Cloud for the enterprise market, they must develop a strong product launch and order management environment to improve the customer experience while managing the operational costs of designing, launching, and delivering complex new products and services.

Oracle Communications Rapid Offer Design and Order Delivery (RODOD) is an innovative, fully integrated, productized solution that cost-effectively reduces time to market for new offer introduction and enables accurate order delivery across all customer service channels. RODOD helps Service Providers achieve an improvement in three key business metrics that are critical to their business and operational success:

- *Offer Time to Market*: the period of time required to create an offer and make the service available for sale

- *Order Cycle Time*: the amount of time elapsed from order submission to when the customer can use the service

- *Operational Efficiency*: a measure of productivity related to a service provider's operating expenditures including systems and people

The RODOD solution is based on three innovative design principles:

- *Decoupling of commercial offers from fulfillment flows*

- *Dynamic generation of orchestration plans*

- *Fulfillment topology abstraction from fulfillment flows*

RODOD keenness for innovation can be found not only in its design principles, but also in its industry thought leadership and in the type of services enabled; RODOD broke ground as the very first solution to be certified by TM Forum against Frameworx; many service providers around the world selected RODOD to deliver innovation through services and business models from Digital Cable to TV Anywhere, from Mobile to M2M, from VPN to Cloud.

The RODOD solution consists of Oracle Product Hub for Communications, Siebel CRM, ATG Web Commerce, Oracle Communications Order and Service Management (OSM), Billing & Revenue Management (BRM), and Application Integration Architecture (AIA) for Communications. Optional products include Oracle Retail, E-Billing, RightNow, E-Business Suite, and the Information Framework (SID) certified Oracle Communications Data Model (OCDM).
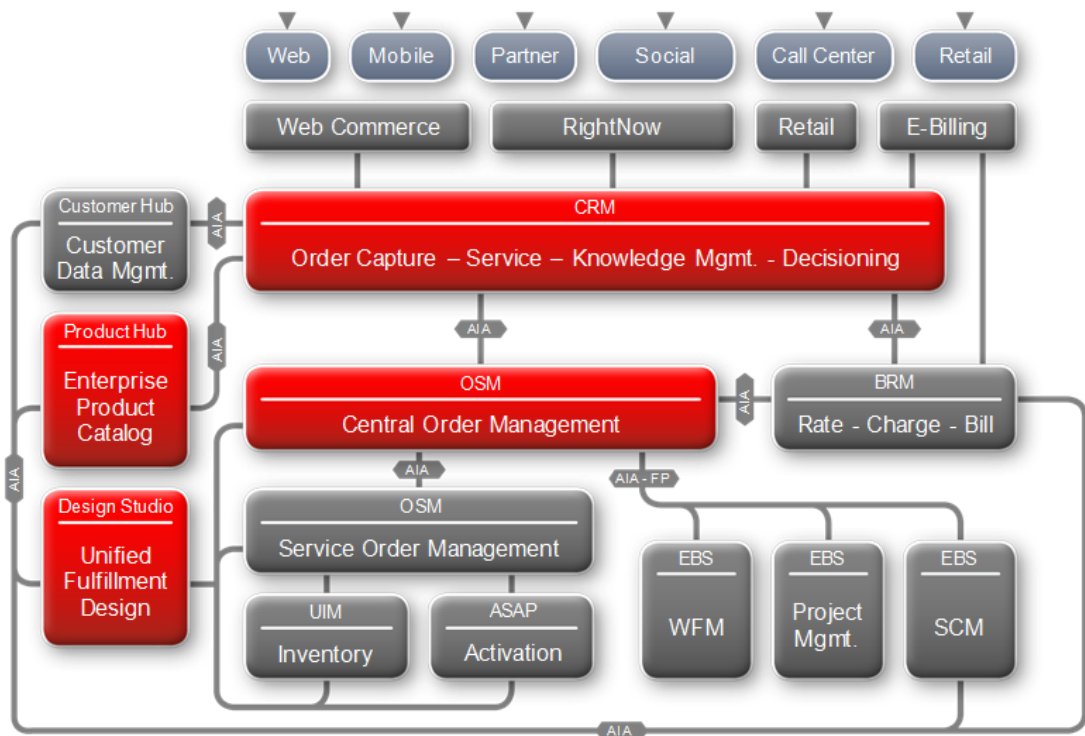
Figure 2.1 - Rapid Offer Design & Order Delivery (RODOD): Solution Components

The Rapid Offer Design and Order Delivery solution leverage the combined power of ATG Web Commerce, Siebel CRM, Oracle Communications Order and Service Management, Oracle Communications Billing and Revenue Management, Oracle Application Integration Architecture for Communications and Oracle Product Hub for Communications to provide CSPs with:

- An adaptive, comprehensive order management solution that eliminates the need for custom development, silos, workarounds and reduces implementation risk

- A flexible solution that automates processes, transactions and interfaces as demand grows

- An integrated offer and fulfillment process design environment that spans and unifies front and back office operations to achieve quick time to market

- Full order status visibility across the order life cycle keeps CSRs and customers informed of order progress

- Accurate, predictable service delivery cost – there is no need to build in redundant resources and capacity to compensate for order fallouts

- Strategic order prioritization, orchestration and decomposition capability to reduce cycle time, error rate, extra truck roll, rework activities

The RODOD solution scope, its innovative design principles, as well as the functional roles and capabilities in support of Concept to Launch, and Order to Cash are described in greater detail in the Rapid Offer Design and Order Delivery Whitepaper, which you can find in the Oracle Rapid Offer Design and Order Management Resource Centre.

2.2   Solution Certification Versions

The following table provides the versions of the primary components in the RODOD solution that have been assessed as part of this certification against Business Process Framework version 12.0.

Table 2.1 - RODOD Solution Certification Versions

Product	Version
Oracle Communications Order & Service Management (OSM)	7.0.x, 7.2
Oracle Siebel CRM	8.1.1.x
Oracle ATG Web Commerce	10.1
Oracle Product Hub for Communications	12.1.3
Oracle Communications Design Studio (DS)	7.2.2
Oracle Communications Billing & Revenue Management (BRM)	7.4, 7.5

Oracle Application Integration Architecture for Communications
  o   Order to Cash Integration Pack – CRM Option
  o   Order to Cash Integration Pack – OSM Option
  o   Order to Cash Integration Pack – BRM Option
  o   Product MDM Integration Base Pack & Options
	11.3

Oracle Fusion Middleware	11.1.1.5.0
Oracle Communications Data Model (OCDM)	11.3.1

2.3   Oracle Communications Concept to Cash Solutions and certifications

In addition to the Rapid Offer Design and Order Delivery (RODOD) solution, which is covered in this document, the Oracle Communications Concept to Cash (C2C) solutions portfolio includes the Unified CRM and BRM (UCB) solution and the Rapid Service Design and Order Delivery (RSDOD) solution.
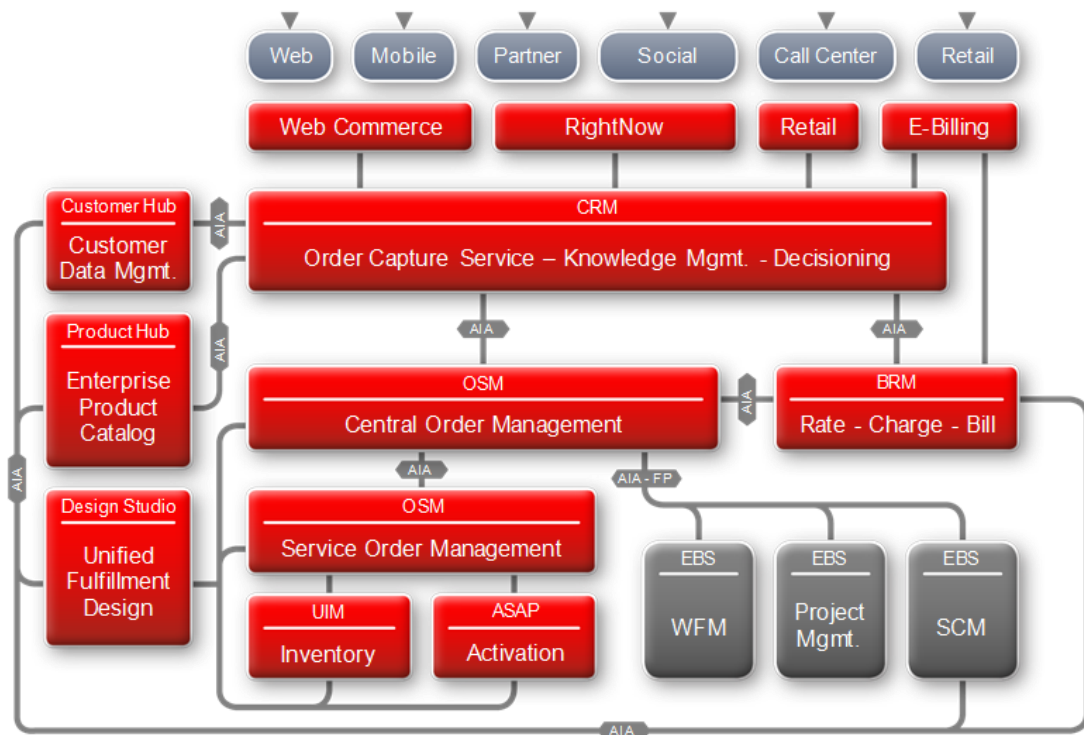
Figure 2.2 - Oracle Concept to Cash Solutions

The Oracle Communications Unified CRM and BRM (UCB) solution enables Service Providers to maximize customer value through unified customer lifecycle management, personalized interactions, and extreme business flexibility to meet ever-changing demands.

The UCB solution consists of Oracle's Siebel CRM, Oracle Communications Billing and Revenue Management, Oracle Customer Hub, Fusion Middleware, and AIA for Communications. Complementary products include Oracle E-Business Suite and Oracle Communications Data Model (OCDM).

Oracle Communications UCB solution addresses three key metrics for customer interactions:

- Customer Lifetime Value – The total value a customer has over his/her lifecycle both as for purchases and influencing purchases

- Customer acquisition and retention – Measure net-adds to minimize churn and maximize customer acquisitions.

- Cost to serve the Customer – Measure customer profitability by considering both revenues and cost per customer and per product.
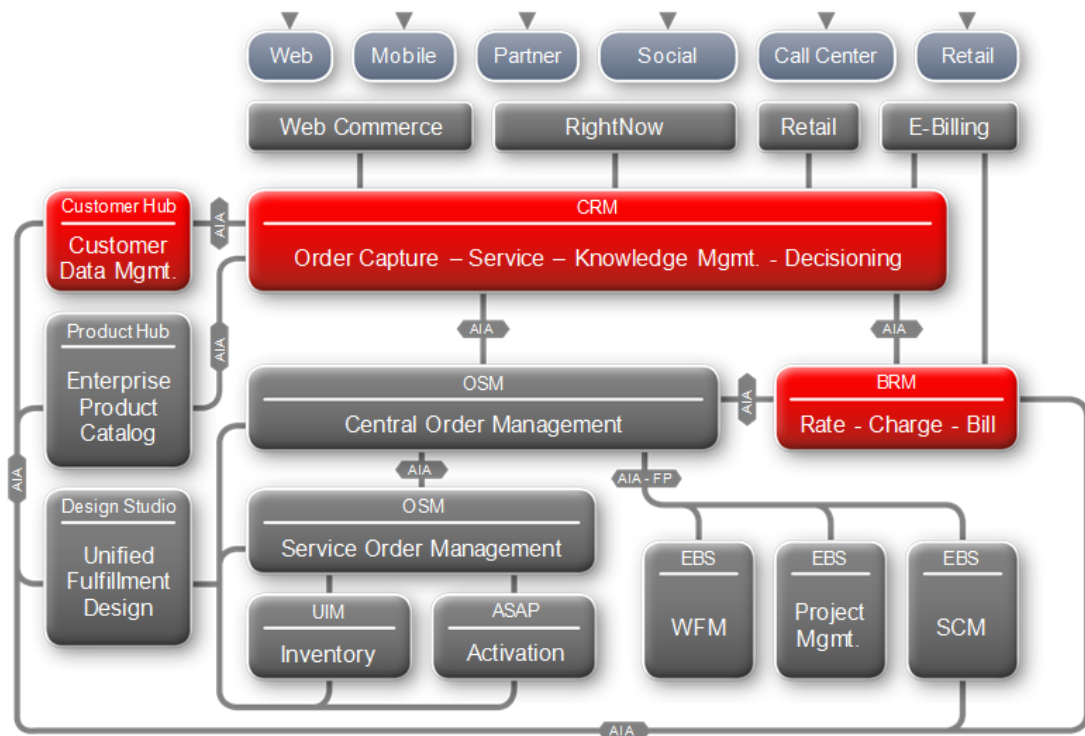
Figure 2.3 - Oracle Concept UCB Solution

The Oracle Communications Rapid Service Design and Order Delivery (RSDOD) solution enables Service Providers to rapidly design, launch, and fulfil orders for any type of service across any network or IT domains and it provides CSPs with the following key business benefits:

- Accelerates time to market through streamlined service fulfillment design capability and decoupling of commercial offers from underlying technology

- Facilitates right first time service fulfillment through a converged platform supporting multiple service domains

- Minimizes IT complexity and cost through a set of COTS based, standards aligned components that can be rapidly deployed to support a productized, open architecture

RSDOD is a comprehensive solution consisting of Oracle Communications Order and Service Management (OSM), Oracle Communications Unified Inventory Management (UIM), Oracle Communications ASAP, Oracle Communications IP Service Activator (IPSA) and Oracle Communications Design Studio. Complementary products from the Oracle OSS portfolio include Oracle Communications MetaSolv Solution (MSS).
Oracle Communications RSDOD solution addresses three key metrics for service fulfillment:

- Service Introduction Time – The time required to create a service (or service bundle) and make it available for sale

- Order Cycle Time – The amount of time elapsed from order entry to service fulfillment

- Cost of Ownership – The expenses related to the deployment and ongoing maintenance of IT applications (incl. labour costs) to support the business functions
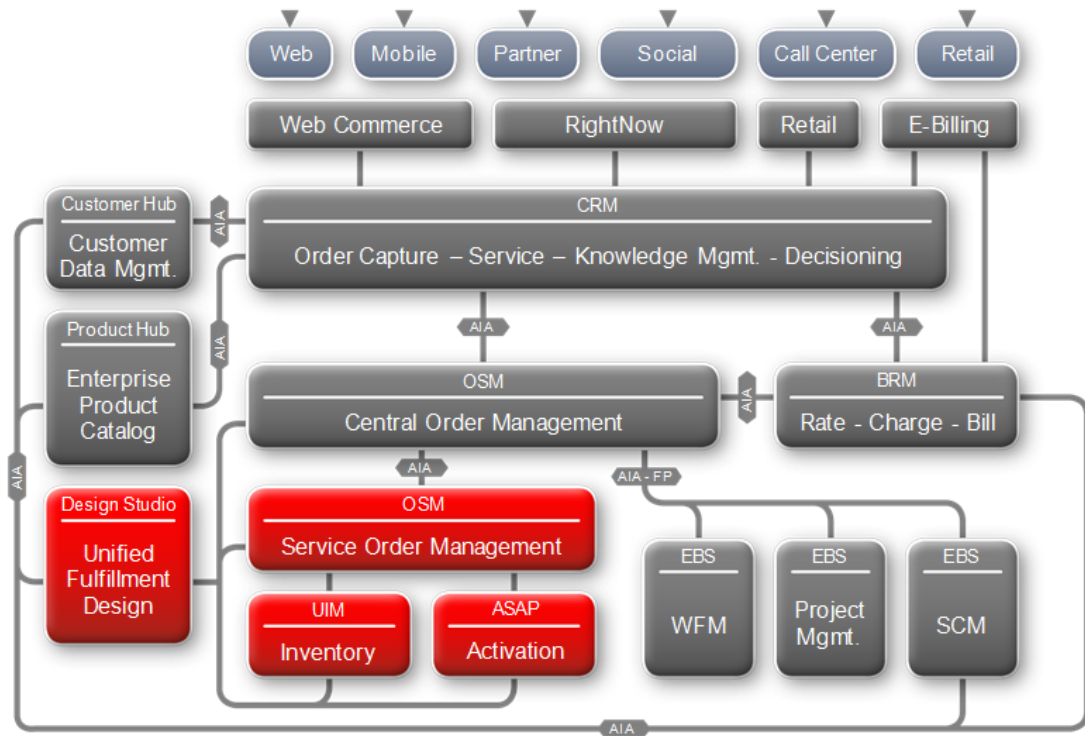
Figure 2.4 - Oracle Concept RSDOD Solution

Oracle pioneered and champions the fact that pre-integrated, productized, Frameworx certified solutions are the foundation to successful industrialization of OSS/BSS transformation, and a vehicle to accelerate delivery of Frameworx benefits to non-expert audience, thereby accelerating and widening Frameworx adoption across the industry. Oracle was the first company to obtain Frameworx certification in the Solution conformance category with the certification of the RODOD solution in March 2011.

After breaking ground with the RODOD certification Oracle went on with its plan to certify all the C2C solutions against Frameworx first by certifying the UCB solution in December 2011, and then by certifying the RSDOD solution and re-certifying the RODOD solution in March 2013. Oracle is the only supplier in the industry which has demonstrated such a rigor and level of commitment to Frameworx.

Solution certification details on the Oracle Communications Concept to Cash Solutions can be found at http://www.tmforum.org/SolutionAssessment/10660/home.html.

Taken together, the three Concept to Cash solutions cover almost entirely the Operations domain and also parts of the Strategy, Infrastructure & Product and of the Enterprise Management domain areas of the Business Process Framework (eTOM). The C2C solution footprint covers the majority of the eTOM processes for Product Lifecycle Management, Operation Support and Readiness, Fulfillment, Assurance, and Billing.
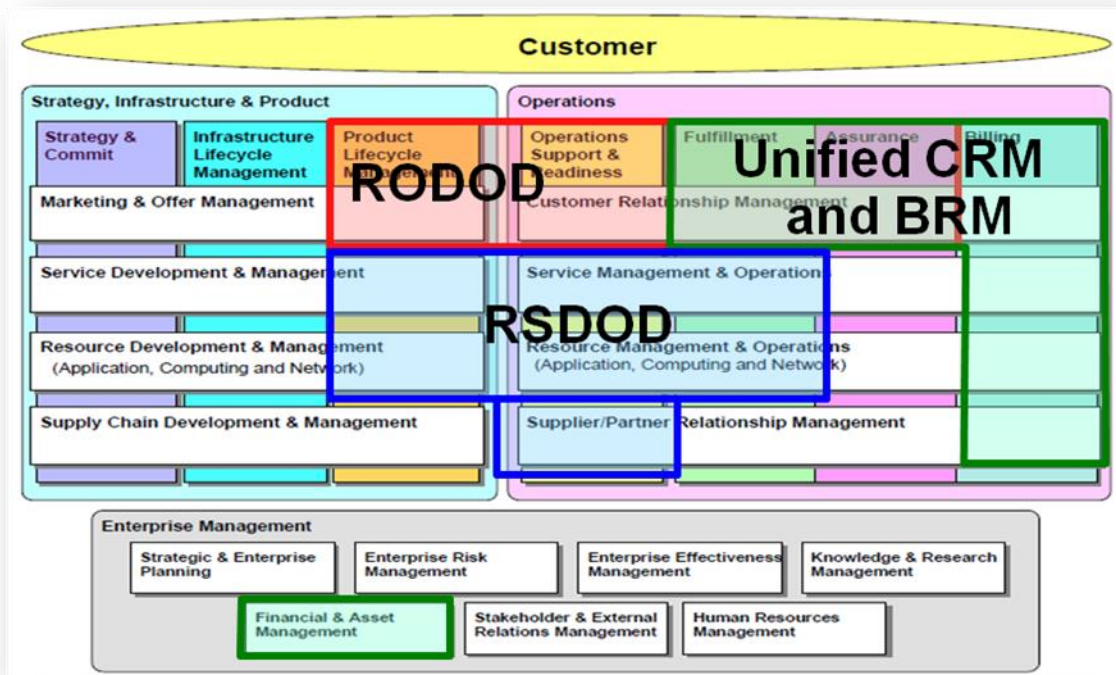
Figure 2.5 - Oracle Communications Concept to Cash Solutions mapping to eTOM Level 1

3 Business Process Framework Assessment Overview

3.1 Mapping Technique Employed

Business Process Framework L3 descriptions are analyzed by looking for implied tasks. (This is similar to how process decomposition can use Semantic Analysis). Each Business Process Framework process is supported by descriptive text. In many cases, each process is aligned and mapped to appropriate company documentation references solution, methodology or modeling material.

The Business Process Framework L3 descriptions are analyzed by looking for implied tasks. Color coded text as highlighted below is used as part of the process mapping whereby highlighted text indicates the level of support for a Level 3 process implied task:

- GREEN is used to highlight key words or key statements that are fully supported
- YELLOW is used to highlight key words/key statements that are partially supported
- GREY is used to highlight key words/key statements that are not supported
- No highlighting is used for words/statements that are irrelevant, just for reference or needed to complete the sentence.

Manual and Automated Support
It is important to determine whether the implied task is supported by manual steps, automated steps, or a combination of both. In this document, "A", "M", or "AM" is used for each task to indicate that the step or steps is/are automated (A), manual (M), or both (AM).

TM Forum Note 1: When process mappings are presented against Level 4 processes, the mappings are provided against the text in the "Mandatory" field for the process. In the event of the Mandatory field not being used, the process mappings are in that case provided against the Level 4 Brief/Extended descriptions.

TM Forum Note 2: Note that if a Level 3 process has not been decomposed to Level 4 processes in the Business Process Framework, in such cases the process mapping support is provided against the Level 4 process descriptions (Brief & Extended).

3.2   Business Process Framework Level 2 Process Scope

This section outlines the Business Process Framework Level 2 processes that were presented in scope for the assessment.

3.2.1   Business Process Framework: Strategy, Infrastructure and Product Scope

The figure and table below provide a more detailed illustration of the connection and complementary nature of the RODOD and RSDOD solutions with regard to the Strategy, Infrastructure and Product domain. As you can see, the RODOD solution focuses on enabling the rapid rollout commercial offers and efficient management of associated lifecycle processes, the RSDOD solution focuses on enabling the rapid design and launch of services that support the commercial offerings.
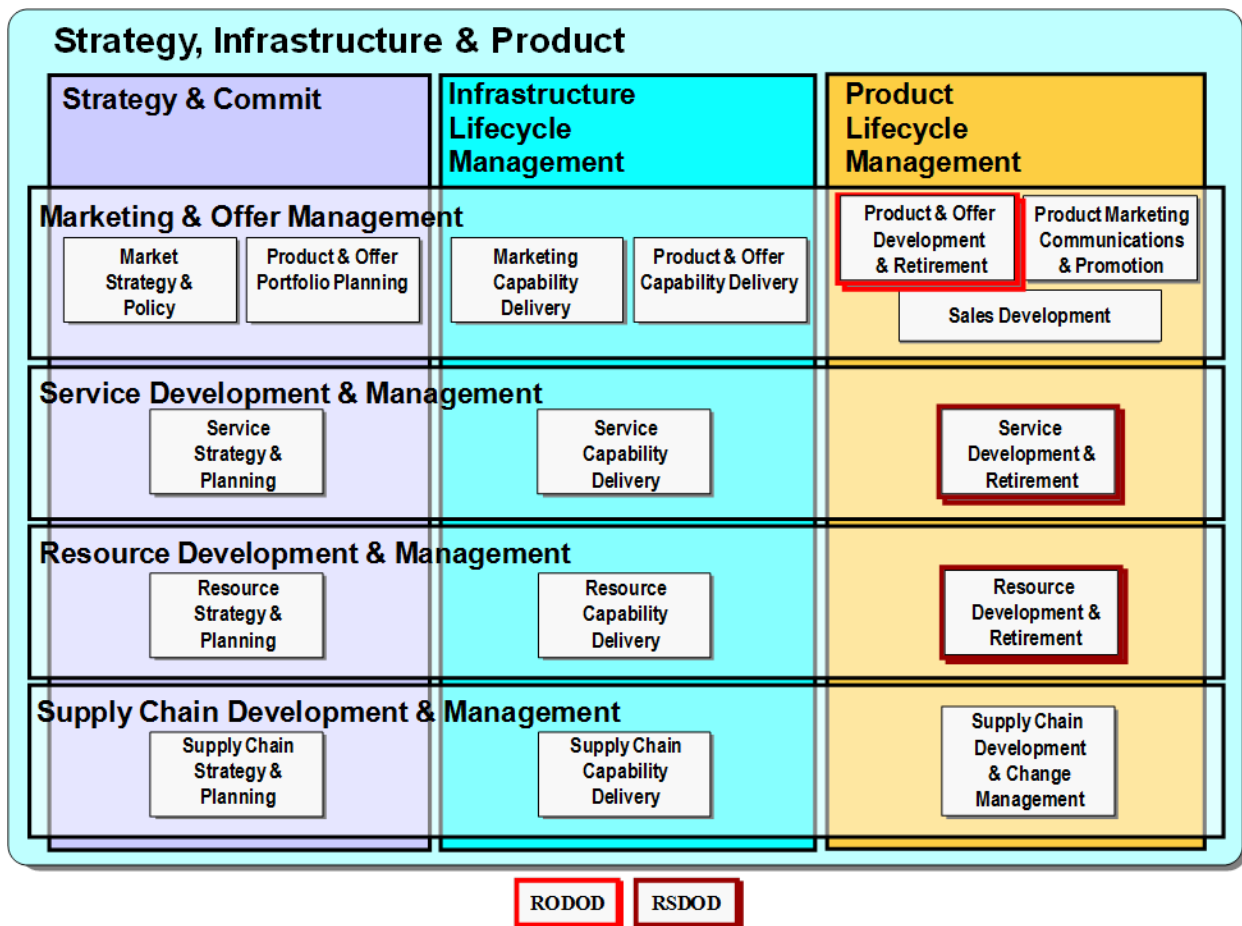
Figure 3.1 - Oracle Communications C2C: Level 2 SIP Processes

Table 3.1 - RODOD & RSDOD: Level 2 SIP Processes

Business Process Framework Level 1 Process Element	Business Process Framework Level 2 Process Element	Solution
Level 0 : Product Lifecycle Management		
Marketing & Offer Management	Product and Offer Development & Retirement	RODOD
Service Development and Management	Service Development and Retirement	RSDOD
Resource Development and Management	Resource Development and Retirement	RSDOD

3.2.2 Business Process Framework: Operations

The figure and table below provide a more detailed illustration of the connection and complementary nature of the three solutions with regard to the Operations domain. As you can see the RODOD solution focuses on enabling the rapid and efficient order capture and enterprise wide order lifecycle management, the UCB solution focused on ongoing customer interactions including billing processes as well as customer and billing care, and the RSDOD solution focuses on the execution of the service fulfilment functions and related processes.
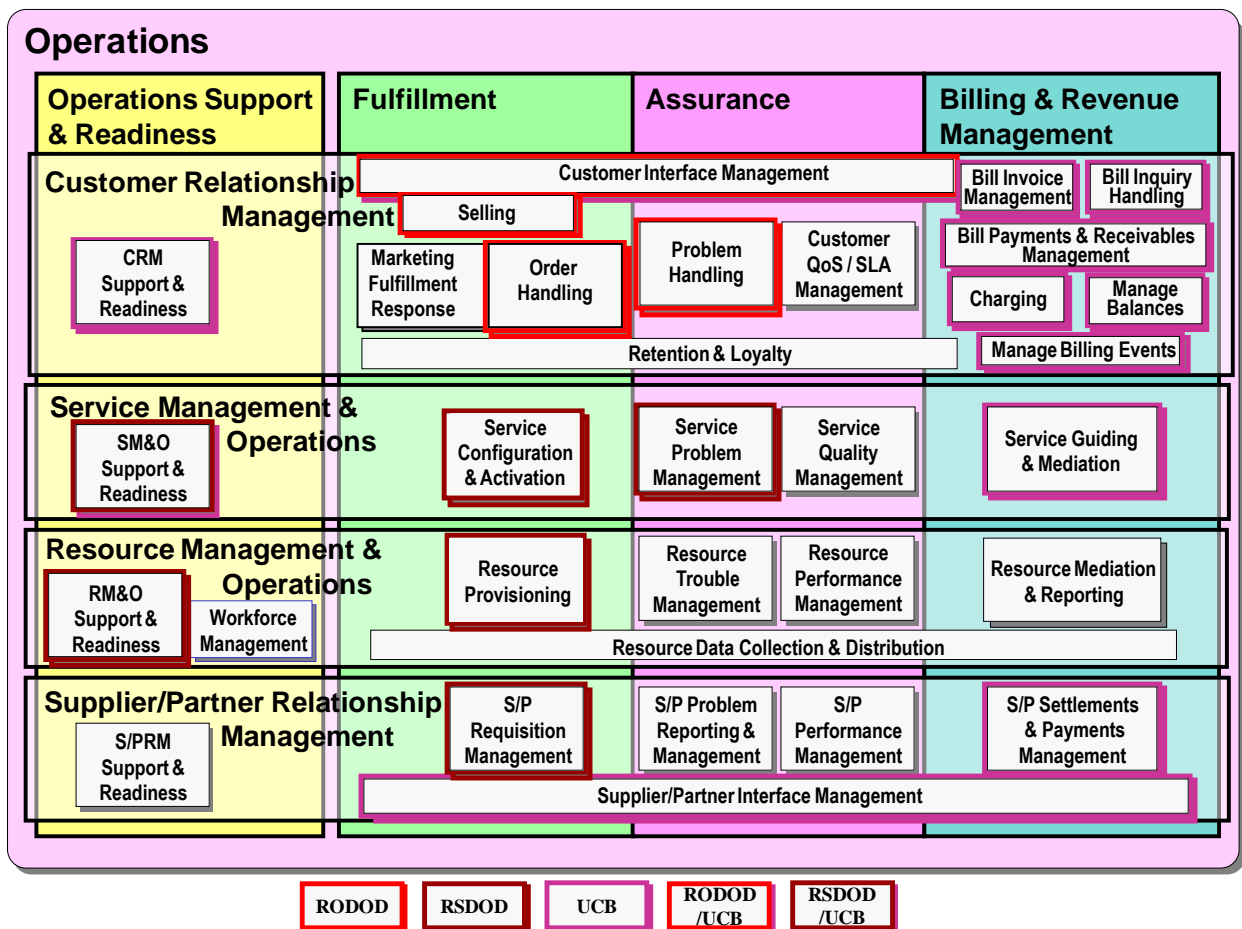
Figure 3.2 - Oracle Communications C2C: Level 2 Operations Processes

Table 3.2 - RODOD, RSDOD, & UCB: Level 2 Operations Processes

Business Process Framework Level 1 Process Element	Business Process Framework Level 2 Process Element	
Level 0: Operations Support & Readiness, Fulfillment, Assurance, and Billing		
Customer Relationship Management	Customer Interface Management	RODOD, UCB
	Selling	RODOD
	Order Handling	RODOD
	Problem Handling	RODOD
	CRM Support & Readiness	UCB
	Bill Invoice Management	UCB
	Bill Inquiry Handling	UCB
	Bill Payments and Receivable Management	UCB
	Charging	UCB
	Manage Balances	UCB
	Manage Billing Events	UCB
Service Management and Operations (SM&O)	SM&O Support and Readiness	RSDOD, UCB
	SM&O Service Configuration and Activation	RSDOD
	Service Problem Management	RSDOD
	Service Guiding and Mediation	UCB
Resource Management & Operations (RM&O)	RM&O Support and Readiness	RSDOD
	Resource Provisioning	RSDOD
Supplier and Partner Relationship Management	S/P Requisition Management	RSDOD
	S/P Settlements & Payments Management	UCB
	S/P Interface Management	UCB

3.2.3 Business Process Framework: Level 3 Process Coverage

The following diagram identifies the number of Level 3 processes that were submitted for assessment, for each Level 2 process that was submitted in scope for the Assessment.
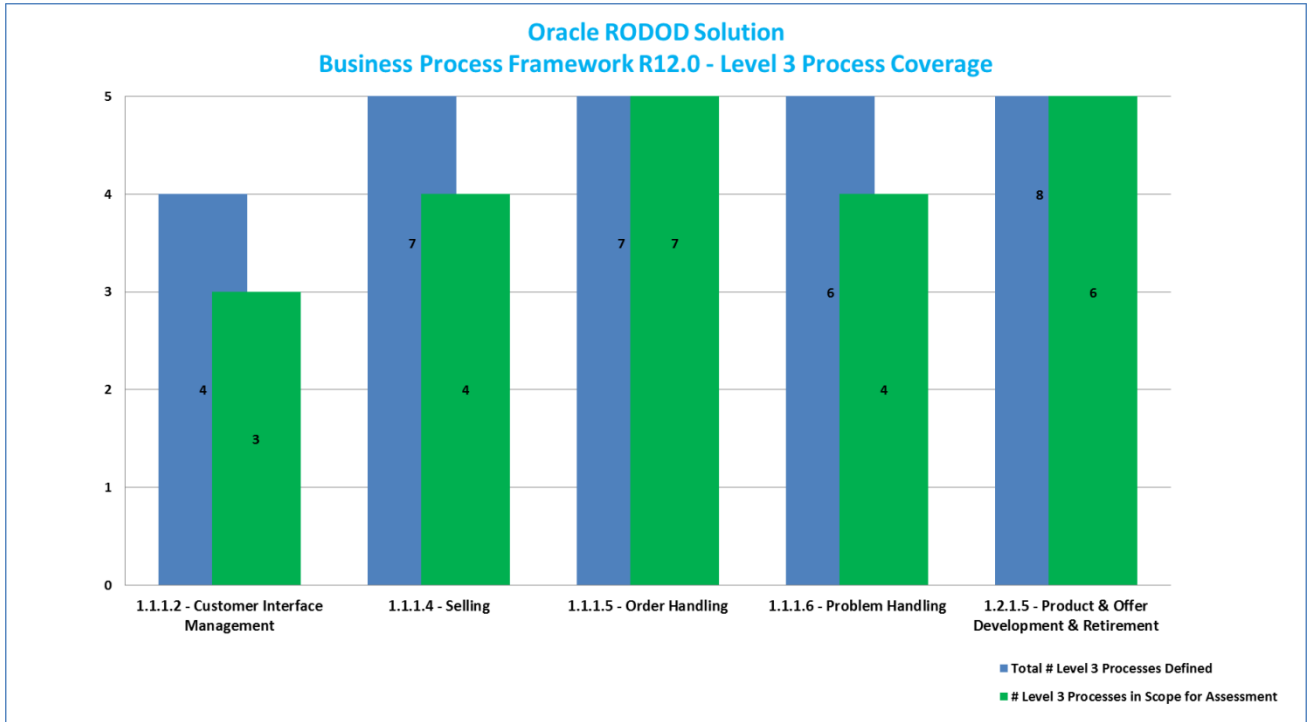
Figure 3.3 - Level 3 process coverage for Oracle RODOD Solution Assessment

3.3 Solution Scope

The Oracle Communications Rapid Service Design and Order Delivery (RODOD) solution address critical CSPs processes in the BSS space. RODOD together with the other Oracle Communications Concept to Cash Solutions (UCB and RSDOD) facilitate the deployment of industry standards compliant processes across the BSS and OSS space.

The following diagram represents the RODOD Solution and how it is mapped to the Business Process Framework processes that were assessed as part of this Frameworx Conformance Assessment.
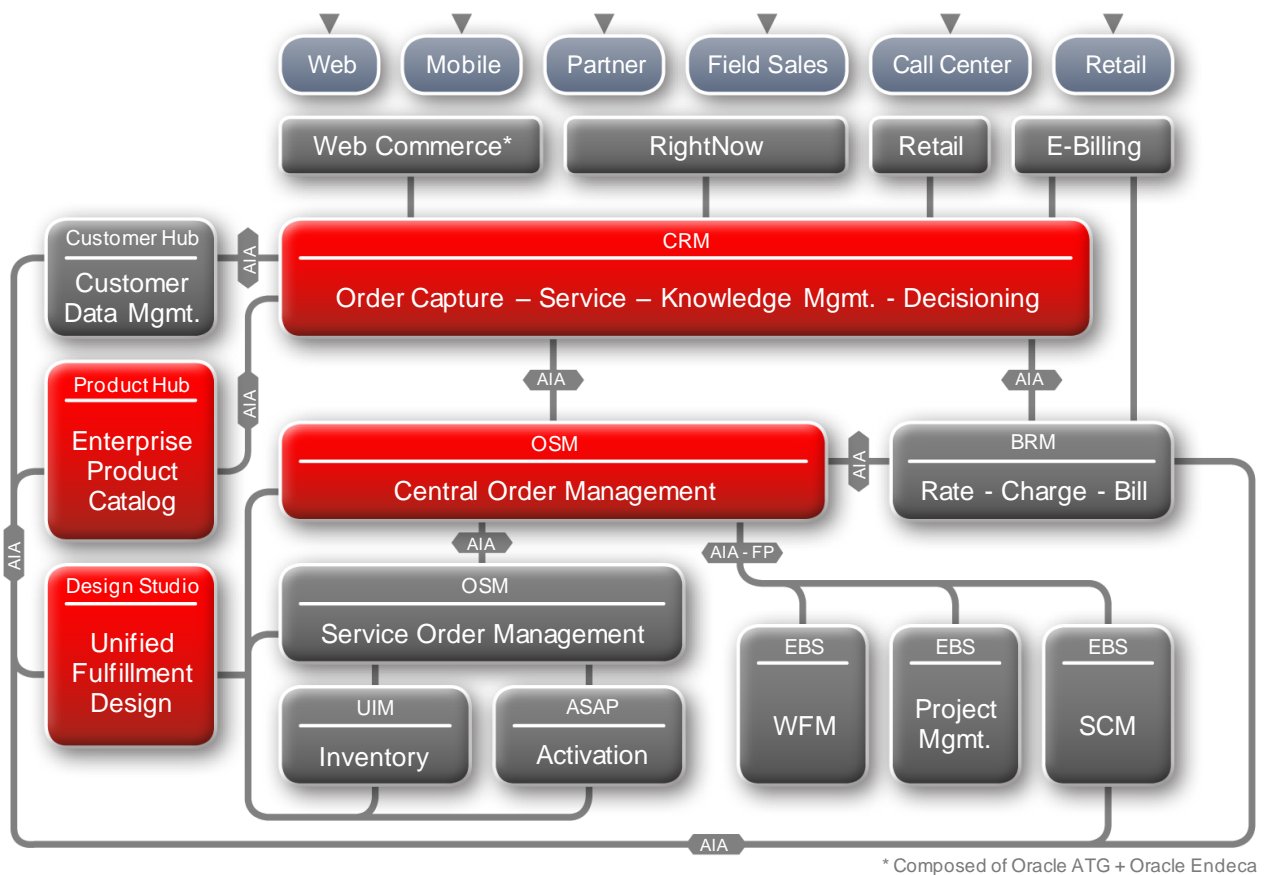
Figure 3.4 - Rapid Offer Design & Order Delivery (RODOD): Solution Components

4   Business Process Framework – Process Mapping Descriptions

This section provides the Process Mapping output from Oracle' Self-Assessment which was reviewed by TM Forum Subject Matter Experts alongside supporting documentation for the Oracle RODOD Solution.

4.1   Level 1: 1.1.1 - Customer Relationship Management

4.1.1   Level 2: 1.1.1.2 - Customer Interface Management

4.1.1.1   Level 3: 1.1.1.2.1 - Manage Contact

Table 4.1 - Level 3: 1.1.1.2.1 - Manage Contact

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.2.1 - Manage Contact
Brief Description Manage all contacts/requests between potential or existing customers and the enterprise *Covered within the body of the Extended Description.* **Extended Description** The purpose of this process is to manage all contacts between potential or existing customers and the enterprise. It deals with the identification of the contact, its development, enhancement and update. (A/M) *Siebel CRM is the central system used for managing all customer and prospect contact across the RODOD solution irrespective of channel. Siebel acts as the central engine that supports the management of customer, prospect & partner contacts, and provides appropriate interfaces to enable this to be supported across multiple channels; contact-centre, CTI, email, web self-service, chat, web-services, etc. (see Manage Request) below.* *Within Siebel a Contact is someone about whom the CSP needs to keep business or personal information. Siebel Communications helps you manage contacts and associate contact data with accounts, leads, opportunities, trouble tickets, or service requests. CSR's, Field Service Representatives, Sales Representatives, Marketing Agents are all examples of end users who might use contact management functions. End users can use Siebel Communications to manage and develop the contact as required, including:* • *Identify contacts (e.g. through CTI/CLI, searching or via a unique identifier) – Automated through the Siebel Communications Server (see below)* • *Record and track business and personal contact information - Manual* • *Create and track a list of activities for a contact – Manual and semi-automated through Activity Lists* • *Create/View/Modify a contact profile - Manual* • *Create/View/Modify information about trouble tickets and service requests that are associated with a contact - Manual* • *Create a Lead or Opportunity against a contact - Manual* • *Send correspondence to a contact – Automated through the Siebel Communications Server (see*

below)

Siebel Comms Guide: (A/M)
  • Contacts in Siebel: Page 79 to 82

4.1.1.2 Level 3: 1.1.1.2.2 - Manage Request (Including Self Service)

Table 4.2 - Level 3: 1.1.1.2.2 - Manage Request (Including Self Service)

LEVEL 3 PROCESS MAPPING DETAILS
1.1.1.2.2 Manage Request (Including Self-Service)

Brief Description

Manage all requests (inbound and outbound) made by potential and existing customers

Covered within the body of the Extended Description.

Extended Description

The purpose of this process is to manage all requests (inbound and outbound) made by potential and existing customers. It receives the request and either enables its originator to automatically fulfill it, or identifies and activates the opportune process to accomplish the request; it manages the status of the request and is able to provide status information at any moment in which the request is active; it formally closes the request when all related activities have been terminated.

 [*Siebel Email Administration Guide*]: (A/M)

❖ *Siebel Email Communications: Page 13*

The following kinds of communications are supported for Siebel application users:

- *Inbound communications. Supports integrating with third-party email servers and processing inbound email (when using Siebel Email Response).*

- *Outbound communications. Supports integrating with a variety of third-party communications products, such as email servers, to send outbound communications. Outbound communications include the following activities:*
  - *Supports the Send Email, Send Fax, and Send Wireless Message commands for Siebel Application users. (The Send Page command uses Page Manager, not Siebel Communications Server.)*

  - *Supports agents sending email replies for Siebel Email Response.*

  - *Supports users sending communications content to designated recipients using outbound communication requests. You can manually create and submit communication requests through a user interface described in this guide. Siebel Workflow and business services can also create and submit communications requests. Several Siebel modules invoke business service methods through workflows to send outbound communications.*

You can create custom drivers for third-party products using the Adaptive Communications API.

The term Siebel Communications Server refers to the set of Siebel Server components and related features that support the functionality described in this book and the functionality described in Siebel Chat Guide and Siebel Email Administration Guide. The key server components are part of

the Communications Management component group. Communications drivers provide the interface to the communications system with which you are integrating. Several drivers are provided with Siebel Business Applications. Where appropriate, you can create custom drivers for third-party products, by using the Adaptive Communications API.

The types of communications supported by Siebel Communications Server include the following:

- *Session-based or interactive communications. Supports multichannel interactive communications for call or contact center agents who use the communications toolbar to make or receive voice calls through Siebel CTI and CTI middleware products. This capability is described in this book. Siebel Chat, which is described in Siebel Chat Guide, also uses session based communications.*
- *Inbound communications. Supports integrating to third-party email servers and processing inbound email, for Siebel Email Response deployments. For more information, see Siebel Email Administration Guide.*
- *Outbound communications. Supports integrating to a variety of third-party communications systems such as email servers to send outbound communications. For more information, see Siebel Email Administration Guide*

[CTI Admin Guide]: (A/M)

❖ **Siebel CTI overview: Page 15, 17**

Siebel CTI (Computer Telephony Integration) provides voice-channel support for call center agents using Siebel Business Applications. Integration with a third-party CTI middleware package provides CTI capabilities. Use communications administration views to configure aspects of the integration, such as to define telesets and associate them with agents.

The Communications Session Manager handles CTI communications. Agents are notified of incoming calls through the communications toolbar and can perform a range of call-handling activities using the toolbar and related menu commands.

Call routing can be handled by the ACD (Automatic Call Distributor), by the CTI middleware, or by a third-party vendor's queuing engine that has been integrated with Siebel Communications Server.

CTI functionality is optionally available through Oracle Contact On Demand (serving as the CTI *Middleware) and the Virtual CTI communications driver. Where appropriate, you can create custom drivers* for third-party CTI middleware products, by using the Adaptive Communications API.

❖ **Using the Communications Toolbar: Page 217 to 233**

The communications toolbar (which is also called the CTI toolbar) allows you to manage many types of inbound and outbound communications work items. Channel types can include voice, email, fax, wireless message, and others.

Supported channel types depend on the Siebel and third-party products your company is using and on your job function. Your company might support types of communications work items not listed here.

The toolbar buttons can be configured based upon the Siebel modules and third-party Communications systems available to you. The communications toolbar is used by various Siebel modules that support communications functions.

The Siebel administrator or configurator can customize the communications toolbar, such as to modify the command a button invokes or add buttons for new commands.

The agent can use a menu command to refresh the status of the communications toolbar.

An end-user (typically a customer support representative) will use the Siebel Communications Toolbar to initiate outbound communications with customers (make call, send email, send fax, send wireless message, send page) or accept incoming communications (accept call, accept email).

Using the communications toolbar, agents can initiate outbound work items and accept inbound work items. In addition, agents may place work items on hold or transfer items to other agents using a choice of blind transfer, consultative transfer or conference transfer capabilities. This is the mechanism used to track the interaction through its life-cycle (receive/initiate, transfer, pause, forward and release/close). Activities & other types of records that are created whilst dealing with an interaction are automatically associated with the work item providing the ability to track and provide status information regarding the interaction. Associated records must be saved before releasing/closing the work item.

[*Siebel Chat Guide*]: (A/M)

❖ ***About Siebel Chat: Page 11***
Siebel Chat is a customer contact channel whereby users in real-time can chat with, for example, a customer service representative (otherwise known as an agent) if they encounter a problem, with a view to troubleshooting that problem and solving that.

The Siebel Communications Toolbar also supports the capability for agents to engage in real-time chat with customers working alongside the Siebel Chat module. Siebel Chat is a Web-based application for handling secure chat communications, including the following:

- *Handling chat interactions using chat-related buttons on the communications toolbar of the Siebel Call Center application.*

- *Conducting chat conversations with a customer by using frequently used text (FUT), the URL library, and by searching the knowledge base and sharing resolutions.*

- *Creating activities and service requests from chat interactions.*

- *Transferring chat interactions to workgroups.*

- *Wrapping up and terminating chat sessions.*

❖ **Siebel Chat Flows: Page 15 to 18**
Examples of customer facing and agent facing chat flows (or end-user processes) have been

provided to explain how this works in practice.

Chat requests are typically initiated through a web-based self-service channel. Siebel's E-Commerce and E-Support self-service applications provide customers with the following capabilities to serve themselves through the web channel:

[Siebel E-Commerce Admin Guide]: (A/M)

❖ *Page 101, 105, 108, 111, 121, 123,126*
E-Commerce:

- *Browse, Login and Review their Account*

- *Contact the CSP via Email or Chat*

- *Look up their Products, Assets, and Orders*

- *Browse and Search the CSPs Commercial Product Catalogs*

- *Configure Products or Promotions*

- *Create and Manage Orders*

- *View and Modifying their Assets (aka purchased Products & Services)*

[Siebel E-Service Admin Guide]

❖ *Page 7*

Oracle's eService provides a Web portal where customers can access service information and a knowledge base. Siebel eService users can view details of any portion of the portal application by drilling down on hyperlinks. The major features of this portal are:

- *User Login. The user registration process for Siebel eService is designed for both anonymous and registered Web users. Anonymous visitors to the Siebel eService site can only view the FAQs, search the knowledge base, and use the self-diagnostic tools. These anonymous users can register, create their personal profiles, and then gain full access to additional Siebel eService capabilities including creating service requests and registering products.*

- *Salutation. The eService salutation area displays text messages based on personalization rules. For example, you can greet users by name and alert them to any new product news. The end result is that users are immediately reminded of information relevant to them, and guided to the right section of the Web site.*

- *Recommended Items. You can personalize the recommended items area of the portal to recommend products based on user attributes such as the products the user has previously purchased or registered.*

- **Contact Us.** *Siebel eService allows customers to communicate with organizations through a variety of communication channels, such as telephone, email, online chat, Voice Over IP, face-to-face communications, and postal mail. The links associated with Contact Us make these channels available. The persistent, global Contact Us button on every eService page also allows customers to choose any communication channel to interact with your business.*

- **My Account.** *Customers' personal and company-specific information includes service requests, orders, billings, and registered products. Siebel eService allows customers to manage the entire lifecycle of their products. By registering and tracking their products, customers can receive product news or literature, track warranty agreements, receive recommendations on scheduled services, and submit and track service requests related to their products. They can check their outstanding order status, including returns, exchanges, and repairs. In addition, they can check their billing history and make payments online.*

- **Self Service.** *Siebel eService includes an integrated, searchable knowledge base. Troubleshooting links provide access to a wide variety of support and service tools. Siebel eService customers can also access helpful "How To" instructions, and they can browse and obtain downloads and documentation.*

- **Top FAQs list.** *Customers can select from a list of the most common support questions.*

[E-Service Addendum Guide]

❖ **Page 71**

Siebel eService for Communications, Media, and Energy is a Web portal that allows your customers to:
- ☐ *Submit and track service requests*
- ☐ *Track the status of orders*
- ☐ *Manage products through their life cycle*
- ☐ *Search a knowledge base for solutions to frequently asked questions and for other information*
- ☐ *Troubleshoot problems using interactive guides*

- ☐ *Locate your nearest retail or service location*
- ☐ *Collaborate with service agents in real time by sharing Web pages, documents, and other desktop information*

[ATG CommerceServiceCenter Guide]: (A/M)

❖ **Chapter 3, 4**

The CSR can take the following actions on behalf the customers:
- *Customer Accounts: Update passwords, addresses, credit cards, issue store credits, create new accounts.*
- *Customer Orders: Create/modify orders, add/delete products, apply promotions, schedule orders, cancel, refund / exchange.*

[ATG Ticketing Guide]: (A/M)

❖ **Page 40**

ATG Self-Service enables a customer to contact the support center when additional help is needed or when they are not able to find what they are looking for on their own. When a Contact Us form is submitted by a customer using the Self Service site, a ticket is automatically created. Ticketing Customer interactions are managed via Tickets, and a CSR can resolve those tickets via functionality delivered via Commerce Service Center.

[ATG CommerceReferenceStore Guide] (A/M)

❖ **Page 161**

Click to Call: *A Click to Call integration with Commerce Service Center enables customers to initiate phone calls with agents. The ATG Commerce Reference Store pages can incorporate links to Click to Call. When a customer clicks one of these links, a popup window prompts for the customer's phone number. When the phone number is submitted, Click to Call initiates a call between a Commerce Service Center agent and the customer, and displays the customer's order information and profile on the agent's desktop.*

4.1.1.3 Level 3: 1.1.1.2.3 - Analyze & Report on Customer [NOTE: not assessed]

Not assessed.

4.1.1.4 Level 3: 1.1.1.2.4 - Mediate & Orchestrate Customer Interactions

Table 4.3 - Level 3: 1.1.1.2.4 - Mediate & Orchestrate Customer Interactions

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LEVEL 3 PROCESS MAPPING DETAILS
1.1.1.2.4 Mediate & Orchestrate Customer Interactions

Brief Description
Ensure that transaction message structure and interactions conform to agreed, externally defined standards used by the enterprise and its customers

Covered within the body of the Extended Description.

Extended Description
The purpose of the Mediate & Orchestrate Customer Interactions is to ensure that transaction message structure and interactions conform to agreed, externally defined standards used by the enterprise and its customers. Increasingly transactions with external parties (e.g. customers using Rosetta Net or Web Services standards) will need to conform to message and data formats defined by third parties or third party organizations. (A)

The primary integration point for interactions between the enterprise (i.e. the CSP) and its customers will be through Siebel CRM. In order to mediate & orchestrate these types of interactions Siebel provides a comprehensive framework for Enterprise Application Integration.

An Application Services Interface (ASI) is a release-independent interface published by Oracle that allows the integration of Siebel with external applications and 3rd parties. Many prebuilt ASI's are provided as standard that can be used immediately, and the ASI framework can be used to build bespoke interfaces that conform to message and data formats defined by 3rd parties.

There are two types of ASI's; inbound and outbound.

- *Inbound ASI - An inbound ASI defines an interface for services provided by Oracle. External or 3rd party applications use this type of ASI to invoke Siebel-provided services.*
- *Outbound ASI - An outbound ASI defines an interface from a Siebel application to an external or 3rd party application system and provides a proxy to the external or 3rd party application that can be called from within the Siebel application.*

Siebel ASI Reference: (A) Page 9 to 12

Web services can make ASI's externally available by using information protocols (such as HTTP) and data formats (such as XML), and other communication protocols, such as SOAP, UDDI, and WSDL.

Siebel ASI Reference: Page 197 to 199

There are many ASI's provided as standard, several of which are specific to the Communications industry.
Siebel ASI Reference: Page 24 to 25

Based on the specific transaction type and involved external party, this conformance will require the identification of the necessary data formats to be sent externally, and conversion of externally received messages into the required internal enterprise formats. In addition, interactions with

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==external parties may require that messages and transactions need to be undertaken with defined and agreed orchestration for message exchange.== (A)

Inbound ASIs can be built using data synchronization services. Within data synchronization services, a data map translates the data in the form of integration objects between an internal integration object and an interface integration object, making the externally published ASI interface independent from the underlying Siebel CRM system.This design allows for both the ability to support external messages and data formats and the conversion of externally received message formats (which might be required by a 3rd party) into the internal message format expected by the underlying Siebel system.

Siebel ASI Reference: (A) Page 16 to 18

==The actual agreement between the parties to use specific interaction standards is part of the Support Customer Interface Management and Support Selling L3s.==

Noted. The Support Customer Interface Management and Support Selling L3s will own the agreement between 3rd parties and the implementation of the required interaction interfaces.

4.1.1.5 Supporting Evidence References (Works Cited)

[Siebel Email Administration Guide]   Siebel Email Administration Guide Version 8.1

[Siebel Chat Guide]   Siebel Chat Guide Version 8.1

[CTI Admin Guide]   Siebel CTI Administration Guide 8.1

[Siebel E-Commerce Admin Guide]   Siebel E-Commerce Administration Guide Version 8.1

[Siebel E-Service Admin Guide]   Siebel E-Service Administration Guide 8.1

[E-Service Addendum Guide]   Siebel eService Addendum Guide 8.1

[ATG Ticketing Guide]   ATG Ticketing Guide 10.1.2

[ATG CommerceServiceCenter Guide] ATG Commerce Service Center Guide 10.1.2

[ATG CommerceReferenceStore Guide] ATG Commerce Reference Store Guide 10.1.2

[Siebel ASI Reference]   Siebel Application Services Interface Reference 8.1

[Siebel Comms Guide]   Siebel Communications Guide 8.1

4.1.1.6 Level 2: 1.1.1.2 - Customer Interface Management - Scores

Table 4.4 - Level 2: 1.1.1.2 - Customer Interface Management - Scores

Level 3 Process	Level 4 Process	L4/L3 Process Score
Level 2: 1.1.1.2 - Customer Interface Management [3/4]		
1.1.1.2.1 - Manage Contact		**5**
	1.1.1.2.1.1 Identify Contact	100%
	1.1.1.2.1.2 Develop Contact	100%
1.1.1.2.2 - Manage Request (Including Self Service)		**5**
	1.1.1.2.2.1 Handle Request	100%
	1.1.1.2.2.2 Provide Request Status	100%
	1.1.1.2.2.3 Close Request	100%
1.1.1.2.3 - Analyze & Report on Customer		**0**
1.1.1.2.4 - Mediate & Orchestrate Customer Interactions		**5**
	1.1.1.2.4.1 Identify Customer Interactions Data Formats	100%
	1.1.1.2.4.2 Orchestrate Customer Interactions	100%
	1.1.1.2.4.3 Mediate Customer Interactions	100%

4.1.2   Level 2: 1.1.1.4 - Selling

4.1.2.1   Level 3: 1.1.1.4.1 - Manage Prospect [NOTE: not assessed]

Not assessed.

4.1.2.2   Level 3: 1.1.1.4.2 - Qualify Opportunity [NOTE: not assessed]

Not assessed.

4.1.2.3   Level 3: 1.1.1.4.3 - Negotiate Sales/Contract

Table 4.5 - Level 3: 1.1.1.4.3 - Negotiate Sales/Contract

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.4.3 Negotiate Sales/Contract
Brief Description Close the sale with terms that are understood by the customer, and are mutually agreeable to both the customer and the service provider. *Covered within the body of the Extended Description.* **Extended Description** The purpose of this process is to close the sale with terms that are understood by the customer, and are mutually agreeable to both the customer and the service provider. This process may involve obtaining customer agreement to standard terms and conditions. The agreement process may require interaction with the customer to ensure that the standard terms and conditions are understood by, and are acceptable to, the customer. *[Siebel Comms Guide]: (A/M)* - *Siebel Agreements: Page 83 to 93* *Siebel Agreements & Entitlements are the traditional mechanisms used to define and agree on the terms and conditions related to the customers service. An **agreement** is a legally binding document that defines the obligations to offer, provide, or produce specific products or services over a set period of time for a specific amount of money. An **entitlement** defines the level of support to which a customer is entitled. Examples of entitlements include response time metrics and service level metrics.* *From an end-user perspective an account manager can create an agreement record with basic information such as account name, effective date, and a general description of products and services to be covered. He next selects the appropriate terms to add to the agreement and specifies contacts for this agreement. Next, he creates an order. When the order is created, Siebel Communications associates the new service with the agreement. The account manager then uses Siebel Communications to generate a physical service agreement. Using a predefined agreement template that the account manager selects, Siebel Communications automatically assembles*

sections from the agreement library and adds the information the account manager entered for the agreement record and its associated terms and contacts. Siebel Communications then places the text in a Microsoft Word document. If necessary, the account manager can manually edit the Word document to personalize it for the customer. Finally, the account manager prints the finished service agreement for the owner's approval and signature.

In some cases this process may involve the development of, and negotiation with the customer of, non-standard terms and conditions associated with sales proposals specifically developed to meet specific customer requirements.

[Siebel Comms Guide]: (A/M)

- *Siebel Agreements: Page 85*

Small and uncomplicated transactions may only need a standard boilerplate agreement. Larger transactions may need a customized collection of boilerplate agreement sections to meet the customer's specific requirements.

For complex sales proposals associated with customer RFPs this process may extend over long time periods and require extensive interaction with customers to achieve agreement. Aspects of contract price determination may include issues of CPE prices from third party vendors, allowances based on customer location, etc.

[Siebel Comms Guide]: (A/M)

- *Siebel Agreements: Page 84 to 85*

*For complex sales proposals, Agreements can be developed and tailored to the unique requirements of the customer over time and through negotiation with the customer. Siebel Agreements allows for many types of tailored agreements to be created including; a **contract** that typically covers the ongoing relationship between customer and service provider, a **sales agreement** covering things like price/discounts/special rates/financing/etc., a **service agreement** covering services covered/price/SLAs/maintenance/warranty/etc., and so on.*

For the most complex agreements Siebel also supports the concept of Master & Sub-agreements. If, for example, a large commercial account requires a master agreement and one or more sub-agreements, end users can designate the main agreement as a master agreement and then generate its associated sub-agreements.

For RFPs, many of the commercial terms being sought may be developed or originated by the customer, and the negotiating team may need to develop strategies to achieve acceptable commercial outcomes.

[Siebel Comms Guide]: (A/M)

- *Siebel Agreements: Page 85*

Data from which to build agreements comes from the agreement library in Siebel Communications. In the more complex cases, where a customer has defined their own terms as

part of a formal RFx process, through negotiation with the Sales and Legal teams – customer specific terms once agreed can be added into the agreement library by the sales or legal team administrators for use in a customer's specific contract/agreement. The agreement library is a data repository developed by your company's sales and legal organizations, it includes information such as recommended and required text for agreement sections, answers to agreement questions, sample cover letters, and sample executive summaries.

The sale is concluded through negotiations and joint agreement on features, service levels, pricing and discounts, resulting in a sign-off formal agreement/contract between the customer and service provider. Depending upon specific circumstances, final agreement from the Service Provider's perspective may require escalation to, and agreement from, an appropriately delegated manager. The formal agreement could include zero or more confirmed orders from the customer.

[*Siebel Comms Guide*]: *(A/M)*

- *Siebel Agreements: Page 89 to 90*

Following the conclusion of formal negotiations, final approval of the contract and terms will need to be sought from the 'Approver' (tracked against the agreement), who is the designated member of the agreement team who is authorized to approve the agreement. Siebel also provides the ability to 'Auto-Document' the agreement where the agreement sections are assembled into a Microsoft Word file according to the template selected, and inserts the specific information from the customer's agreement record. The document can be edited, printed and signed, as necessary. The saved Word document is then automatically associated with the agreement record.

These orders are then passed on as requests to allow formal Customer Orders to be generated and processed.

[*Siebel Comms Guide*]: *(A/M)*

- *Siebel Agreements: Page 90 to 91*

Following the finalization of a customer's Agreement, new quotes and orders generated for that customer / account will have the Agreement tied to it to ensure the agreed terms and conditions are applied.

[*ATG CRS Guide*] *(A)*

- *Siebel Agreements: Page 99 to 101*

The Commerce Reference Store provides the ability to calculate and render prices of the products. The mechanism for rendering prices depends on whether the prices are being shown on the product detail page or as part of the checkout process, at which point prices may get modified by things like promotions and discounts. The sale is concluded when the customer accepts and submits the Order, which results in formal sign-off on the contract on the pricing and discounts, between the customer and service provider.

4.1.2.4 Level 3: 1.1.1.4.4 - Acquire Customer Data

Table 4.6 - Level 3: 1.1.1.4.4 - Acquire Customer Data

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.4.4 Acquire Customer Data

Brief Description

Capture and record all pertinent customer data required for the initiation, realization and deployment of the agreed sales proposal.

Covered within the body of the Extended Description.

Extended Description

The purpose of this process is to capture and record all pertinent customer data required for the initiation, realization and deployment of the agreed sales proposal.

[Siebel Comms Guide]: (A/M)

- **Siebel Accounts: Page 47 to 49**

The selling process within Oracle's RODOD solution is exclusively managed from within the Siebel CRM solution. An 'Account' is the central entity used within Siebel, and all selling related customer data is associated with this key entity, e.g. leads, opportunities, quotes, orders, agreements, profiles (customer, billing, etc.), installed assets, etc. These sections of the documentation illustrate a sequence of procedures performed by an end-user to set-up and configure a customer Account.

In most standard offerings the necessary customer data is often captured on the sales proposal agreement form associated with the standard offerings.

[Siebel Comms Guide]: (A/M)

- **Siebel Opportunities: Page 113 to 115**

See Note 1: In Siebel terminology an Opportunity is any lead that could result in a sale, and is therefore the primary entity used for gathering the necessary customer data associated with a sales proposal. Detailed information about the configuration of the customers proposed products and services will generally be captured in a customer Quote or Order, which may or may not be associated with an Opportunity. Opportunities are most likely to be used to support a B2B sales situation. This section of the documentation describes how an end-user would use the Opportunity functionality to capture the sales proposal information against a customer account.

For non-standard and/or complex sales agreements associated, for instance, with a customer RFP, extensive customer information may be required to plan and roll-out the agreed solution.

[Siebel Order Mgmt Addendum]: (A/M)

- ***Asset-Based Ordering: Page 479 to 482***

See Note 2: Typically most sales proposals in the Communications industry in both consumer and business market segments are complex in nature. Offerings can contain both physical goods and services, each of which may need to be uniquely configured based on the customers preferences, and have complex and varying price types, e.g. one-time, recurring and usage-based charging. Once a customer has successfully purchased a service, the related assets usually need to be tracked so future changes to the installed services and assets can be changed (upgraded, disconnected, added to, etc.). Siebel's 'Asset-Based Ordering' supports these types of complex requirements, and the referenced documentation provides an overview of this capability and a use case of how an end-user might use this functionality.

For example, Centrex designs require extensive capture of details surrounding deployment of handsets, features associated with each handset, customer Centrex groups, etc.

[*Siebel Order Mgmt Addendum*]: (A/M)

- ***Networking Order : Page 507 to 529***

In many cases the Siebel Configurator has the capability to handle the configuration and validation of complex products in its own right. However for configuring complex orders for services such are large networks with 100's of nodes and potentially 1000's of connections, Siebel provides an advanced 'Network-Ordering' capability. Used in conjunction with Asset-Based Ordering, this is an ideal tool where a bespoke design of a network service is required for a customer, with potentially complex configuration required at each site or node.

In some cases the necessary level of precise detail may be available from the Develop Sales Proposal. Where this is not the case, this process is responsible for determining the precise customer information required to support the agreed proposal, capturing (through forms, or customer interviews, etc.) the required customer information, and storing the details in a form required by other processes.

[*Siebel Comms Guide*]: (A/M)

- ***Business functions in Siebel Comms: Page 22 to 24***

The precise customer information required to support the agreed proposal with the customer will be captured by the end-user through a series of application screens that support the related business functions, as mentioned above. The Account will represent the overall customer organization, against the account there may be several associated Profiles (e.g. Billing, Financial), Agreements will be used to define agreed terms and conditions, Opportunities will be used to manage the sales opportunity and Quotes and Orders will be used to define the precise configuration of the product and services being bought. A more comprehensive list of business functions that supports the end-user in the gathering of customer information is provided in the 'Business Functions in Siebel Comms' section of the referenced documentation.

[ATG CRS Guide] (A)

- *Personalization: Page 37 to 40*

The Commerce Reference Store provides the ability to capture the customer profile as part of customer the registration process.   Since, Every Commerce site has its own requirements for the information it must store for external users, customers can extend the profile properties that are shipped with Commerce. The following properties are available in the customer profile - name, age, gender, billing address, email address, default shipping address and default payment options.

4.1.2.5 Level 3: 1.1.1.4.5 - Cross/Up Selling

Table 4.7 - Level 3: 1.1.1.4.5 - Cross/Up Selling

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.4.5 Cross/Up Selling

Brief Description

Ensure that the value of the relationship between the customer and service provider is maximized by selling additional, or more of the existing, products.

Covered within the body of the Extended Description.

Extended Description

The purpose of this process is to ensure that the value of the relationship between the customer and service provider is maximized by selling additional, or more of the existing, products.

[Siebel Order Mgmt Guide]: (A/M)

  - *Product Recommendations : Section 9 pages 145 to 156*

Siebel Order Management provides a number of mechanisms for driving cross and up-sell across the customer base. This section of the Order Management guide provides details on how a marketing administrator can define up-sell and cross-sell recommendation rules which are executed during the order capture process.

  - *Scenarios for Recommendations : Page 146 to 147*

The reference provided here gives an example scenario of how a marketing administrator would configure the required cross-sell and up-sell rules within the commercial product catalogue, and how these rules will automatically drive recommendations to an end user which they can accept or reject during an interaction with a customer. As an end-user, when a sales rep (e.g. CSR) adds a product or service to a customer order Siebel will automatically evaluate all cross-sell and/or up-sell rules associated with the product and display a list of ranked messages. The sales rep can accept or reject the recommendation messages; when accepting, the appropriate product or service will automatically be added to the order, upon rejection the rules will be automatically re-evaluated and the resulting ranked messages displayed to the sales rep.

  - *Cross-sell & Up-sell Recommendations (A/M)Page 152 to 154*

The reference provided here gives an example screenshot of how cross-sell and up-sell recommendations are automatically presented to an end-user, and how they would accept or reject these system generated recommendations.

The ongoing analysis of customer trends (e.g. usage, problems, complaints) is used to identify when the current offerings may no longer be appropriate for the customer, or when the opportunity for a larger sale arises. Based on the data collected, more appropriate offerings should be recommended to the customer.

o *[Oracle RTD for Siebel Intelligent Offer Generation]: (A/M)*
  o *Overview: Page 7 to 10*

As well as standard cross-sell and up-sell rules that are available to marketers as part of the standard Siebel Order Management capabilities, Oracle provides a sophisticated real-time decisioning (RTD) engine that is pre-integrated with the operational CRM system to provide intelligent Offer recommendation and Retention management features across multiple channels such as call-centre and E-Commerce. Oracle RTD service combines predictive analytics technology with dynamic eligibility rules and scoring rules to maximize the value from customer interactions. The criteria for rules can be based on a variety of attributes, for example, historical and transactional data from Siebel CRM, the age of a customer, the salary of a customer, recent sales, recent trouble-tickets, recent life events, and so on. RTD can anticipate customer needs in real time automatically, and adapt each interaction to the needs of the customer.

  ❖ *End User Scenarios for recommendation and retention Page 63 to 65*

RTD proactively makes a decision about the best way to proceed with the customer in the context of the specific interaction (e.g. is an up-sell, cross-sell, or retention activity most appropriate) and presents this to the end user (e.g. a CSR in a contact-centre, or a customer on the web) for their evaluation.

The reference provided here gives an example screenshot of how RTD recommendations (Retention Actions and Intelligent Offers) are automatically presented to an end-user, and how they would accept or reject these system generated recommendations.

[ATG CRS Guide] (A)

• *Recommendation on Demand Integration: Page 167 to 169*

The Commerce Reference Store can optionally use Oracle Recommendations On Demand to display recommended products on top-level category pages and product detail pages. The recommendations are based on the shopper's browsing and purchasing history, as well as the browsing and purchasing history of other customers.

4.1.2.6 Level 3: 1.1.1.4.6 - Develop Sales Proposal [NOTE: not assessed]

Not assessed.

4.1.2.7 Level 3: 1.1.1.4.7 - Manage Sales Accounts

Table 4.8 - Level 3: 1.1.1.4.7 - Manage Sales Accounts

LEVEL 3 PROCESS MAPPING DETAILS
1.1.1.4.7 - Manage Sales Accounts

Brief Description

Manage the sales accounts assigned to the sales channel on a day-day basis

Covered within the body of the Extended Description.

Extended Description

The purpose of the Manage Sales Accounts processes is to manage the sales accounts assigned to the sales channel and/or sales manager on a day-day basis. (A/M)

Day-to-day sales accounts are generally managed through Siebel Opportunities. An opportunity can either represent a lead or an opportunity (which is a qualified lead) and is defined as a potential revenue-generating event.

Siebel Apps Admin Guide: (A/M) About Opportunities: Page 363 to 364

Siebel Marketing can be used in the prospecting process to generate leads, which will be automatically assigned to the most qualified sales rep through the Siebel assignment manager. The sales rep will use Siebel to accept, develop and qualify the lead, which may result in it becoming a qualified opportunity.

Siebel Apps Admin Guide: (A/M) Opportunities Scenarios: Page 364 to 365

These processes are responsible for contacting the customers associated with each sales account on a regular basis appropriate for the type of account,

Activities and Activity Plans can be used to track and drive (using automatic notifications) activities for opportunities by maintaining a calendar and to-do list for the opportunity, and delegate activities to other sales team members.

Siebel Apps Admin Guide: (A/M) Opportunities Activities: Page 373

Activities are also used to help guide sales reps using formally defined sales methodologies.A sales method can encompass all activities associated with the sales process, from prospecting to forecasting to closing deals.

Siebel Apps Admin Guide: (A/M) Lead Qualification &Sales Methods: Page 366 to 367

to develop the appropriate relationships and contacts,

Siebel supports the end-user by helping to develop relationships and contacts leveraging capabilities such as the automatic creation of organization charts to help the user analyze their key contacts and capabilities such as mapping the politics in the customer organization by identifying informal lines of influence between contacts. This helps the end user to develop the right relationship strategy to win the opportunity

Siebel Apps Admin Guide: (A/M) Organisation Analysis: Page 375 to 378

to prospect for leads, to promote the enterprise's product offerings, etc.

As described above, Opportunities are used to manage sales accounts but Siebel CRM also provides a number of modules specifically aimed at helping to comprehensively manage different types of sales accounts. These modules provide functionality to help guide sales professionals through the process of managing their sales accounts:

- *The Enterprise Selling Process (ESP) module helps sales professionals identify the customer's business drivers and initiatives, uncover opportunities in key business and service units, develop global account strategies, manage key executive and partner relationships, and coordinate team activities.*

Siebel Apps Admin Guide: (A/M) Enterprise Selling Process: Page 419 to 421

- *The Target Account Selling module provides full support for the Target Account Selling (TAS) sales methodology. Using the Target Account Selling methodology and the Target Account Selling module, sales professionals can assess opportunities, conduct organizational and competitive analysis, and develop and execute effective sales strategies.*
Siebel Apps Admin Guide: (A/M) Target Account Selling: Page: 433 to 435

- *The Portfolio Management Process (PMP) is an account-based, structured methodology for sales professionals who manage a portfolio of accounts, and who must be responsible for, penetrate, retain, and grow those accounts. A portfolio contains a set of accounts organized by industry application, geographic location, and so on. Typically, a portfolio contains strategically important accounts that represent high-potential business for the sales organization.*

Siebel Apps Admin Guide: (A/M) Portfolio Management: Page: 449 to 451

4.1.2.8 Supporting Evidence References (Works Cited)

[Siebel Comms Guide]   Siebel Communications Guide Version 8.1

[Siebel Order Mgmt Guide]   Siebel Order Management Guide Version 8.1

[ATG CRS Guide]   ATG Commerce Reference Store Guide 10.1.2

[Oracle RTD for Siebel Intelligent Offer Generation] Version 3

[Siebel Order Mgmt Addendum]   Siebel Order Management Addendum for Communications 8.1

[Siebel Apps Admin Guide]   Siebel Applications Administration Guide 8.1

4.1.2.9 Level 2: 1.1.1.4 - Selling - Scores

Table 4.9 - Level 2: 1.1.1.4 Selling - Scores

Level 2: 1.1.1.4 - Selling [4/7]		
Level 3 Process	**Level 4 Process**	**L4/L3 Process Score**
1.1.1.4.1 - Manage Prospect		0
1.1.1.4.2 - Qualify Opportunity		0
1.1.1.4.3 - Negotiate Sales/Contract		**5**
	1.1.1.4.3.1 Negotiate Standard Terms & Conditions	100%
	1.1.1.4.3.2 Develop & Negotiate Non-standard Terms & Conditions	100%
	1.1.1.4.3.3 Obtain Customer Agreement	100%
1.1.1.4.4 - Acquire Customer Data		**5**
	1.1.1.4.4.1 Determine Required Customer Data	100%
	1.1.1.4.4.2 Capture & Record Customer Data	100%
1.1.1.4.5 - Cross/Up Selling		**5**
	1.1.1.4.5.1 Analyze Customer Trends	100%
	1.1.1.4.5.2 Recommend Appropriate Offerings	100%
1.1.1.4.6 - Develop Sales Proposal		0
1.1.1.4.7 - Manage Sales Accounts		**5**
	1.1.1.4.7.1 Contact Customer (on regular basis)	100%
	1.1.1.4.7.2 Develop Contacts & Leads	100%

4.1.3   Level 2: 1.1.1.5 - Order Handling

4.1.3.1 Level 3: 1.1.1.5.1 - Determine Customer Order Feasibility

Table 4.10 - Level 3: 1.1.1.5.1 - Determine Customer Order Feasibility

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.5.1 Determine Customer Order Feasibility

Brief Description

==Check the availability and/or the feasibility of providing and supporting standard and customized product offerings where specified to a customer.==

Covered within the body of the Extended Description.

Extended Description

==The purpose of the Determine Customer Order Feasibility process is to check the availability and/or the feasibility of providing and supporting standard and customized product offerings where specified as part of the standard product offering process flow, to a customer.==

The Oracle RODOD solution supports two primary types of Customer Order Feasibility checks:

- **Commercial Order Feasibility** – *these commercial order feasibility checks are performed by the Siebel CRM solution or ATG eCommerce solution*
- **Technical Order Feasibility** – *these technical feasibility checks are performed by Order & Service Management leveraging the Technical Service Qualification capability*

[*Siebel Product Administration Guide*]: (A/M)

- **Product & Promotion Eligibility: Page 353 to 356**

For Commercial Order Feasibility Siebel firstly enforces 'Product & Promotion Eligibility' rules. Product and promotion eligibility allows a Product Manager to manually create rules specifying which customers are eligible to buy a product and which customers are eligible for product promotions. Some examples of product eligibility are; A CSP may have different wireless plans available for different geographical areas, or an ISP may have certain DSL services only to customers who live within a specified distance of certain cities. These rules are automatically evaluated and enforced at 'run-time' to ensure that to products are sold to ineligible customers.

- **Product & Promotion Compatibility: Page 364 to 366**

Another important aspect of Commercial Order Feasibility is enforcing 'Product & Promotion Compatibility' rules. Compatibility allows a Product Manager to manually define rules specifying which combinations of products, product attributes, or product promotions are required and which combinations are not allowed. Some examples of product compatibility are; When selling a 4g/LTE wireless plan an LTE enabled handset must be provided as part of the bundle, or an ISP must provide an 8mbps speed line (or higher) if selling IPTV as part of the bundle. These rules are automatically evaluated and enforced at 'run-time' to ensure that no incompatible products are

sold to end-customers.

Once all the Commercial Order Feasibility checks have been performed then Technical Order Feasibility checks can be performed.

[ATG Merchandising Guide Biz users]

- ***Managing Promotions and Coupons: Chapter 14***

The online eCommerce application enforces the validation of products, applies promotion or coupons as part of the checkout process. The promotions and coupons allows a Product Manager to define rules , for example, if the customer receives a discount on item(s) or discount on the complete order or discounted shipping and compatibility between promotions. Coupons make promotions available to customers when a user enters a coupon code to encourage return visit.

Once all the Commercial Order Feasibility checks have been performed then Technical Order Feasibility checks can be performed.

[*Siebel Order Mgmt for Comms Guide*]*: (A)*

- ***Submitting an Order for TSQ: Page 112 to 113***

Oracle's integrated RODOD solution supports the concept of Technical Service Qualification (TSQ) as part of the overall Order Handling process. Firstly, Siebel CRM supports the concept of submitting a commercially qualified Sales Order specifically for the purpose of technical qualification, pages 82 & 83 of the Siebel Order Management guide describes how sales orders can be submitted for technical qualification. TSQ orders can be submitted for standard and fully customized product offerings. As the TSQ order is processed by Order & Service Management after order submission the fulfillment status in the sales order is automatically updated (possible values; Pending TSQ, Passed TSQ, Failed TSQ). If the order does not pass the TSQ qualifications then the 'Status Context' field will be automatically populated with an explanation of why the line item failed the TSQ.

These processes invoke requests to SM&O provisioning processes to determine the availability and supportability of product offerings to a customer. These processes are also responsible for determining whether the offering can be supported by other CRM processes.

[*Comms O2C Impl Guide*]*: (A)*

- ***Understanding the O2A Process: Page 7.1 to 7.11***
- ***O2A Business Process Flows: Page 7.3 to 7.4***

Once a commercial Sales Order is submitted from Siebel CRM for technical qualification, this is passed seamlessly through the out-of-the-box AIA based 'Order-to-Activate' integration to Order & Service Management (OSM). OSM understands that this order is for qualification rather than for delivery and dynamically generates an orchestration plan so the technical feasibility of the order can be determined. OSM executes the orchestration plan and invokes a request (or several

requests if the customer's order contains more than one service that needs to be provisioned) to the SM&O provisioning process. The resulting provisioning order in the SM&O 'designs' the requested service, but does not 'assign' and 'activate' (because this is a 'qualify' order rather than a 'deliver' order) and reports back to OSM with a status update, i.e. was the design process completed successfully. If yes then this part of the customers service is technical feasible to be provisioned. The results of the Order Feasibility check are automatically passed back to the originating Siebel CRM Sales Order as status updates, both at the order-line and order-header levels. This provides comprehensive cross-channel visibility of the TSQ to both the agent and the customer.

4.1.3.2 Level 3: 1.1.1.5.2 - Authorize Credit

Table 4.11 - Level 3: 1.1.1.5.2 - Authorize Credit

LEVEL 3 PROCESS MAPPING DETAILS 1.1.1.5.2 Authorize Credit

Brief Description

Assess a customer's credit worthiness in support of managing customer risk and company exposure to bad debt

Covered within the body of the Extended Description.

Extended Description

The purpose of the Authorize Credit processes is to assess a customer's credit worthiness in support of managing customer risk and company exposure to bad debt. This process is responsible for initiating customer credit checks and for authorizing credit and credit terms in accordance with established enterprise risk and policy guidelines.

[Siebel Comms Guide]: (A/M)

- *Profiles: Page 67 to 68*

From and end-user perspective, the process of assessing a customer's credit worthiness is initiated against a customer's account from within the Siebel CRM application. An end-user can create a 'Financial Profile' against an account from which a credit-check on the customer can be performed, either through integration with a 3rd party credit bureau, or internal back-end systems.

[Siebel Order Mgmt Guide]: (A/M)

- ❖ *Integrating with 3rd Party Credit-Check: Page 77 – 84*

Siebel CRM provides a comprehensive framework for integrating to 3rd party credit-check applications, and for controlling how, when and by whom credit-checks should be performed from an end-user perspective. End-users are guided as to when credit-checks need to be performed, and

this can be configured based on an organizations requirements. By default credit checks will only be performed if; Payment Method = Purchase Order, Skip Credit = No, PO Amount > Credit Auto-Approval Limit. The documentation provides further details on how Administrators & End-users can adjust the Credit Auto-Approval limits for accounts, how auto cred-credits can be skipped for an account, and restricting who can administer credit-checking. This chapter in the Siebel Order Management guide discusses this in detail.

[*Siebel CRM IP for OM O2C Impl Guide*]: (A)

❖ *Credit Check Integration Flow: Page 9.1 – 9.7*

Typically when business customers are paying for products and services with purchase orders, a back-office AR or credit management application will perform the actual credit-check on the customer account. It is the responsibility of the 3ʳᵈ party AR application to make a credit determination in accordance with risk and policy guidelines using the previous history with the customer account and other credit data. Oracle provides out-of-the-box AIA based integration between Siebel CRM and Oracle E-Business to enable a synchronous credit-check call initiated from Siebel CRM. As standard Siebel supports credit checks against both Quotes & Sales Orders, however this OOTB integration has only been enabled to work with Sales Orders.

[ATG CRS Guide]

❖ *Payment Options: Page 111*

ATG Commerce Reference Store supports two payment options: store credits and a single credit card. If a customer is logged in and has one or more store credits, the value of the credits is automatically applied toward the price of the order. If the credits are less than the total price of the order, the customer must use a credit card to pay for the remainder of the order. If the credits are more than the total price of the order, no further payment is required, and the difference between the order price and the credits is retained for use on future orders.

ATG Commerce Reference store captures the required information for the credit card that can be passed to third-party service to validate the entered data, to review for fraud and authorization.

4.1.3.3 Level 3: 1.1.1.5.4 - Track & Manage Customer Order Handling

Table 4.12 - Level 3: 1.1.1.5.4 - Track & Manage Customer Order Handling

LEVEL 3 PROCESS MAPPING DETAILS
1.1.1.5.4 - Track & Manage Customer Order Handling

Brief Description
Ensure customer provisioning activities are assigned, managed and tracked efficiently to meet the agreed committed availability date

Covered within the body of the Extended Description.

Extended Description
The objective of the Track & Manage Customer Order Handling processes is to ensure customer provisioning activities are assigned, managed and tracked efficiently to meet the agreed committed

availability date.

Responsibilities of these processes include, but are not limited to: (A)

The Order to Activate business process is at the core of business and operational support systems for any Communications Service Provider (CSP). The process extends from the time a quote or order is created, to the time when the goods and services are delivered and properly billed.

The AIA based Order to Activate Process Integration Pack (PIP) works with the Order to Bill PIP and participating applications to enable the orchestration, tracking and handling of the customer order, including support for these business processes:

[*Comms O2C Impl Guide*]:: (A) Understanding Order to Activate: Page   7.1 to 7.11

- Scheduling, assigning and coordinating customer provisioning related activities;
- Generating the respective service order creation request(s) to Issue Service Orders based on specific customer orders; (A)

A customer order is captured in CRM. Once an order is complete and validated in CRM, it is submitted to OSM (Central Order Management) for delivery. Customer orders (both Qualify and Deliver request types) received in OSM are first recognized (as AIA Customer Orders), mapped to fulfillment patterns, and enriched with fulfillment metadata. OSM decomposes and orchestrates the customer order. OSM divides the order into sub-orders, called order components, which have cross-order components, cross-order lines, and cross-order dependencies, to reflect the specific demands of the CSP. The outcome is an order orchestration plan. The fulfillment flow that is produced orchestrates fulfillment requests to different fulfillment providers using preconfigured fulfillment functions, such as sync customer into billing, initiate and fulfill billing, provision order, ship order, and install order.

The swimlane diagram on page 7.6 of the referenced documentation illustrates this process flow. In the 'Order Lifecycle Management' swimlane there is a representative example of a dynamically generated orchestration plan that is created by Central Order Management (COM) from the customer order as described in the explanation above. You will see that one of the steps represented in this 'Sample Central Fulfillment Deliver Flow' is 'Provision Order'. This is a specific example of where the COM layer issues a Service Order down to the Provisioning/SM&O layer based on the specific customer order. This is what Oracle classifies as the SOM or 'Service Order Management' layer.

This is a fully automated process unless specific manual processes have been built into the design of the order orchestration processes.

[*Comms O2C Impl Guide*]:: Deliver Customer Order Flow: Page 7.6

- Escalating status of customer orders in accordance with local policy;

See monitoring jeopardy & escalations below.

- Undertaking necessary tracking of the execution process; (A)

A CSR or Customer can track the progress of their order through the status updates provided upstream to Siebel CRM from OSM during order execution. For detailed tracking of the execution

process the OSM Task Web Client can be used. The Task Web Client provides the user interface for order tracking and operational reporting information. You use it to create, view, edit, track, and report on provisioning-level service orders and tasks in the OSM system.

[*OSM Task Web Client UG*]: (A) About the Task Web Client: 1-1 to 1-4

- Adding additional information to an existing customer order; (A)
- Modifying information in an existing customer order;
- Modifying the customer order status; (A)

In response to 1.1.1.5.6 we discussed the various options a CSR or customer has for modifying their in-flight orders through out-of-the-box integration between Siebel CRM and OSM (e.g. revision, follow-on, cancel orders). The OSM Task Web Client provides the ability for an Order Management back-office specialist to manually amend in-flight orders should the need arise.

[*OSM Task Web Client UG*]: (A) Manually Amending Orders: 3-21 to 3-24

An Order Management back-office specialist can also add remarks and attach documents pertaining to each order using the Add Remark option. For example, if the task for an order has taken longer to complete than expected, you can add a remark explaining why this has happened.

[*OSM Task Web Client UG*]: (A) Adding Additional Info to Orders: 3-13 to 3-16

- Canceling a customer order when the initiating sales request is cancelled;

In response to 1.1.1.5.6 we discussed how a CSR or customer can cancel an in-flight order, and through out-of-the-box integration this cancellation flows through to OSM. The OSM Task Web Client also provides the ability for an Order Management back-office specialist to manually cancel in-flight orders should the need arise.

[*OSM Task Web Client UG*]: (A) Cancelling Orders: 3-19 to 3-21

- Monitoring the jeopardy status of customer orders, and escalating customer orders as necessary; (A)

Within OSM a jeopardy notification is a message that you can configure in Design Studio to occur under specific conditions, and to be sent to specific users or systems for escalation. You can configure jeopardy notifications to be sent once, periodically, or when certain conditions arise in an order or task to alert users or systems of processes, orders, or tasks that may be at risk.

[*OSM Task Web Client UG*]: (A) Jeopardy Notifications: 3-23

Fallout occurs when one or more errors are identified that prevent an order from being processed normally. Order fallout can occur at any point in the order's lifecycle and in multiple places. If an order goes into a fallout state this can cause the order to go into jeopardy because it will not be fulfilled. To mitigate the risk of the order reaching jeopardy status OSM detects, reports, and resolves order fulfillment fallout incidents such as system, validation, and fulfillment errors. Oracle's Order-to-Activate integration automates the creation of trouble tickets in CRM when fallout occurs to take advantage of the rich notification, reporting, and management capabilities of CRM.

[Comms O2C Impl Guide]: (A) Using Order Fallout Management in O2A: Page 21.1 to 21.16

[*OSM Concepts*]: (A) Order Fallout Management: 11-1 to 11-4

and
- Indicating completion of a customer order by modifying the customer order status.

Throughout the fulfillment process, OSM maps fulfillment function responses to common statuses, which are then aggregated into order line statuses and order header status values. The status management capability automatically updates the corresponding sales order in CRM with relevant customer status and milestone values. OSM also updates CRM when order lines reach their point-of-no-return (PONR) to prevent the submission of new in-flight revision orders. It also updates CRM with any enrichment to order lines that may have taken place during fulfillment. Ultimately, for a successful order, each order line-item status and then the order header status will be set to 'Completed' through up-stream notifications from OSM.

On the completion of the order in CRM, the Asset Based Ordering (ABO) functionality in Siebel generates asset records against the customer's account based on the successfully completed order-lines. End-users can then use the Accounts screen to view the customer's Installed Assets, and if required create modify orders referencing the customer's existing assets.

[Comms O2C Impl Guide] : (A)
- Update Sales Order Overview: Page 16.1 to 16.3
- Understanding the Process Integrations for Sales Order Fulfillment: Page 9.1 – 9.8

Note that some specific product components may be delivered directly by suppliers/partners. In these cases the Track & Manage Customer Order Handling process is responsible for initiating requests, through S/P Requisition Management for the delivery by the supplier/partner of the specific product components. (A)

See Note 1: In cases where partners or suppliers are responsible for provisioning or fulfilling certain elements of a customer's order (e.g. 3rdparty used for shipping or WFM, 3rd partner service provider), OSM's Central Order Management functionality automatically decomposes the order into sub-orders, each of which targets a particular fulfillment provider. Any of these fulfillment providers could be either in-house or a 3rdparty supplier or partner. For example the logical topology could be; three in-house billing providers based on customer segment (wholesale, residential, and business), three provisioning stacks based on service family and geography (in-house Mobile, partner VoIP, partner Broadband), two shipping providers, one for in-house products and another for partner supplier products, finally - one 3rd party workforce management provider for CPE installation. OSM is responsible for orchestrating the requests to these fulfillment providers and monitoring the subsequent responses. An example of this type of topology is provided in the documented reference.

[Comms O2C Impl Guide]: (A)
- Typical Topology: Page 7.4 to 7.5

4.1.3.4 Level 3: 1.1.1.5.5 - Complete Customer Order

Table 4.13 - Level 3: 1.1.1.5.5 - Complete Customer Order

LEVEL 3 PROCESS MAPPING DETAILS
1.1.1.5.5 - Complete Customer Order

Brief Description

Manage customer information and interactions after customer contracts or associated service orders have been finalized and during the order completion phase

Covered within the body of the Extended Description.

Extended Description

The purpose of the Complete Customer Order processes is to manage customer information and interactions after customer contracts or associated service orders have been finalized and during the order completion phase.The customer may participate in commissioning or end-to-end testing and then satisfactory delivery. The customer is trained in the functionality and benefits of the solution. These processes are responsible for ensuring that any customer information required by other CRM processes is updated as part of the customer order completion. A/M

As described in response to '1.1.1.5.4 Track & Manage Customer Order Handling', OSM provides the central order management capability that manages the provisioning of a customer's order, delivering status updates to the CRM Sales Order as each milestone completes. Tasks that need to performed by the customer and tracked after the order has been successfully provisioned and before the order can be officially 'closed (such as end-to-end testing, training, etc.) can be tracked and recorded as 'Activities&Activity Plans' against the Order. For example if a customer is required to perform an series of end-to-end tests for a new product or service this can be recorded as an 'Activity Plan' against the order-line that relates to that product or service. The final order will only be 'Closed' once all associated Activities against the order have been completed.

Siebel Apps Admin Guide: (A/M) Activities: Page 189 to 190

4.1.3.5 Level 3: 1.1.1.5.6 - Issue Customer Orders

Table 4.14 - Level 3: 1.1.1.5.6 - Issue Customer Orders

LEVEL 3 PROCESS MAPPING DETAILS
1.1.1.5.6 Issue Customer Orders

Brief Description

Issue correct and complete customer orders.

Covered within the body of the Extended Description.

Extended Description

The purpose of the Issue Customer Orders processes is to issue correct and complete customer orders. These processes ensure that all necessary information about the Customer Order (for example, type of product, install address, special requirements, etc.) is available.

[Siebel Order Mgmt Guide]: (A/M)

- *Asset-Based Ordering: Page 239 to 258*

Siebel CRM provides CSRs, customers and partners the ability to work with and define complete, accurate and validated quotes & orders using Asset-Based Ordering (ABO). ABO ensures that all necessary information about a customer's order is collected and available and allows CSPs to:

- *Generate asset records from orders (automatic)*
- *Create quotes for new products and services using existing assets (user driven, supported by application functionality)*
- *Create quotes to modify existing products and services(user driven, supported by application functionality)*
- *Modify in-process orders that have been submitted for fulfillment (user driven, rules enforced through application and integration logic)*
- *Suspend, resume, or discontinue an existing service (user driven, supported by application functionality)*
- *Have visibility into the asset life cycle during customer interactions*

The customer orders may be required to satisfy pertinent customer requests from the Selling processes (in particular taking into account the purchase order from Negotiate Sales),

[Siebel Order Mgmt Guide]: (A/M)

- *Checking Credit for a PO: Page 198*

See Note 1: When a Purchase Order has been selected as the payment type for a quote or order during the Negotiate Sales process, this will be an important aspect of the order that is submitted during this process. For example, Siebel will automatically enforce the requirement for a PO credit-check if the PO Amount is greater than the Credit Auto-Approval limit. See 1.1.1.5.2 for more details.

[Siebel Comms Guide]: (A/M)

- *Scenarios for Agreements: Page 85 to 87*

[1] *Agreements & Entitlements will often be negotiated and defined during the selling process. These legally binding commercial agreements, both simple & complex (each potentially with multiple levels, each with different terms, conditions & discounts), can be associated with an order (and revised if necessary) to ensure negotiated terms through the selling process are enforced during the order handling processes.*

may arise as a result of requests for customer provisioning activity to satisfy customer problem restoration activities, may arise to alleviate customer performance issues.

[Siebel Order Mgmt Guide]: (A/M)

- *Modifying an Asset: Page 249 to 250*

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[1] Provided as additional context

See Note 1: Where a customer is experiencing a fault or performance issues with their provisioned services, Siebel Asset-Based Ordering can be used to change a customer's service configuration by re-configuring their problematic 'Installed Assets' and submit/issue this change order for provisioning.

==These processes assess the information contained in the customer order relating to the sales request or initiating customer process request to determine the associated customer orders that need to be issued.==

[Siebel Comms Guide]: (A/M)

- ***Opportunities in Siebel for Comms: Page 113 to 120***

When negotiating in a more complex sales cycle (typically in a B2B situation), an Opportunity will be used to help manage the sale. Siebel CRM allows sales representatives to manually add the relevant products and services required by the customer against the opportunity, and forecast against these. To ensure consistency when providing formal quotations to the customer, and when ultimately an order is placed, Siebel allows Quotes to be automatically generated from an Opportunity as also automatically update an Opportunity with product information defined in the Quote. Siebel also supports the automatic creation of an Order from a Quote agreed with a customer. This coordination of data across Opportunities, Quotes and Orders ensures that when an Opportunity closes with a customer the associated customer orders that need to be issued are well understood and managed.

==The issued customer order may require a feasibility assessment,==

[Siebel Order Mgmt for Comms Guide]:(A)

- ***Submitting an Order for TSQ: Page 112 to 113***

TSQ Order: As discussed in 1.1.1.5.1, Siebel CRM supports the concept of submitting a Sales Order specifically for the purpose of technical qualification, pages 82 & 83 of the Siebel Order Management guide describes how sales orders can be submitted for technical qualification.

==may require new provisioning activities,==

[Siebel Order Mgmt Guide]: (A)

- ***Creating a Quote or Order: Page 157 to 164***

Orders (or quotes) for new products and services against an account or contact that require new provisioning activities are the simplest type of Asset-Based Order (ABO),which is supported by Oracle's Order-to-Activate (O2A) productized integration between Siebel & OSM. This is classified as a 'New' customer quote or order.

[Siebel Order Mgmt Guide]: (A)

- ***Creating a Modify Quote or Order: Page 244***

Change orders (or quotes) against a customer's existing products or services (aka Installed Assets)

is another example of an order type supported by Siebel's ABO and the O2A process integration. This is classified as a 'Modify' customer quote or order.

[Siebel Order Mgmt for Comms Guide]:(A)

- ***Processing a Sales Order through AIA: Page 101 to 106***

Once a customers' Order is ready for submission it is submitted and processed through the O2A AIA based integration, which will result in the execution of the required provisioning activities for the successful fulfillment of the order.

may require a change to a previously issued customer order,

Changes to 'in-flight' customer orders tend to be an order-of-magnitude more complex to handle than simple order types such as New and Modify orders. The combination of Siebel's ABO, OSM and the O2A AIA based integration supports several 'in-flight' order types, including:

[Siebel Order Mgmt Guide]: (A)
- ***Revision Orders: Page 254***

[Comms O2C Impl Guide]: (A)
- ***Revision Orders: Page 8.2 to 8.3***

Revision Orders (inflight): The fulfillment of certain services may take days and weeks, and some B2B and infrastructure projects may take months to complete. During this period, customers change their minds and request changes to their orders that become revision orders in Siebel. In many cases, continuing the base order when a revision is submitted is costly for the CSP, and sometimes the operation cannot be fully undone. For these reasons, support for revision orders provides the following benefits:

- *Enhances customer satisfaction by allowing customers to change their orders within an agreed-upon limit.*
- *Reduces the costs associated with fulfilling unwanted goods and services requests and wasting system capacity, unrecoverable resources, acquired stock, and so forth.*
- *Reduces human intervention to manually retrofit data records when recovery cannot be automated.*

[Siebel Order Mgmt Guide]: (A)
- ***Follow-On Orders: Page 221***

[Comms O2C Impl Guide]: (A)
- ***Follow-On Orders: Page8.3 to 8.4***

Follow-on Orders (inflight but past PONR): The fulfillment of some services may take days and weeks, and some B2B and infrastructure projects may take months to complete. During this period, customers change their minds and request order changes that become revision orders in Siebel if the subject order lines did not reach the Point-of-no-Return (PONR) or become follow-on orders otherwise. In many cases, not taking an order pending the completion of in-flight orders is not acceptable; hence, Siebel simulates the future state of in-flight orders and allows for the

creation and submittal of follow-on orders that are nothing more than change orders based on the projected future state of a customer's assets.

or may require cancellation of a previously initiated customer order.

[Siebel Order Mgmt for Comms Guide]: (A)
- *Cancelling and Order: Page 81*

 [Comms O2C Impl Guide]: (A)
- *Revision Orders: Page 8.2 to 8.3*

The Oracle RODOD solution treats the cancellation of an in-flight Order as a type of 'Revision' order. Order to Activate supports these cancellation patterns:

- *Cancel the entire order. Siebel introduced a Cancel Order button that resubmits the order with the Fulfillment Mode order header attribute value set to CANCEL.*
- *Drop an order line. When an ADD for a new product is dropped, Siebel will drop the order line from the revision order. Creating a revision order that drops all orders lines produces the same effect as cancelling the entire order.*

The customer order may also relate to the cancellation of previously purchased specific services.

[Siebel Order Mgmt Guide]: (A)
- *Deactivating an Installed Asset: Page 256 to 257*

Siebel ABO can also be used to create a Disconnect or Deactivate order that will cancel or disconnect an existing service.

Other useful order types supported by Siebel ABO not mentioned explicitly here include Suspend and Resume orders; when you create a suspend order, you stop a service, the customer is still the owner of the service, but no service is being delivered. When you create a resume order, you recommence a service that has been suspended.

Where, the initiating request for a purchased product offering has a standard customer order this process is responsible for issuing the customer order, and for creating a record of the relevant initiating sales request and the associated customer order. Where the initiating request for a purchased product offering has special or unusual requirements, and a specific feasibility assessment has been previously undertaken, this process is responsible for issuing the customer order, and for creating a record of the relevant initiating request information and the associated customer order.

[Siebel Order Mgmt Guide]: (A)
- *The Order Management Life-cycle: Page 18*

This process is tracked through the 'Order Management Life-cycle'. One example of how order management might be used is provided here, however end users may start the order management process at a number of different screens and views, but the underlying order

management cycle is essentially the same:

- *An opportunity is created to track a customer's interest in products & services*
- *A quote is automatically generated from the opportunity and the products & services are configured to the customer's specific requirements*
- *The quote is accepted and automatically converted to a sales order*
- *Order validation and enrichment tasks are performed such as ATP checks, TSQ checks, credit checks, attaching PO's, etc.*
- *Order is submitted to provisioning/activation*
- *On order completion the appropriate product order line-items are automatically created as 'Installed Assets'*
- *These 'Installed-Assets' are associated with the customer account and are a central part of the customer's service profile.*

A more complete description of the Order Management Life-cycle has been provided in the associated reference.

Where the initiating request for a purchased product offering has special or unusual requirements, and a specific feasibility assessment has not been previously undertaken, this process marks the issued customer order as requiring special handling, and passes management for further processing to the Track & Manage Customer Order Handling process.

In Oracle's RODOD solution, the need for a Technical Service Qualification (TSQ) order is controlled at the CRM layer. If a TSQ on a special or unusual product or service is required this will be initiated from the Sales Order in CRM and handed to the 'Track & Manage Customer Order Handling' process for qualification. If the 'Qualify Order' passes the TSQ then the sales order can be submitted for 'Delivery' down to the 'Track & Manage Customer Order Handling' process. Further details on RODOD's support for TSQ is provided above.

The orchestration, if required, and tracking of the customer order progress is the responsibility of the Track & Manage Customer Order Handling processes.

See Note 2: Once a commercial order is submitted from Siebel, Oracle's Order & Service Management (OSM) is responsible for the orchestration and tracking of the customer order. See the following section (1.1.1.5.4) for further details.

[*Reference Oracle RODOD Overview*] *(A/M)*

The Cross Channel Customer Experience solution and the Rapid Offer Design and Order Delivery solution constitute the foundation for the Oracle CX Reference Architecture for Communications, front a front office BSS perspective and provide CSPs with the comprehensive capabilities to deliver a superior experience to their customers across channels, across business processes, and across front and back office operations

1.

2.   The Oracle Cross Channel Customer Experience (CX) Reference Architecture for Communications improves the customer experience across multiple customer touch-points, across multiple processes, and across front and back office operations through:

- *Seamless cross-channel purchasing and services experiences*

- *Personalized offers and interactions*
- *Fast time-to-market to meet customer demand*
- *First-right ordering*
- *Rapid fulfillment*
- *Reduced order fallout*
- *Accurate billing*

[*ATG CRS Guide*] *(A)*

- ***The Order Handling: Page 111 to 114***

The ATG's Commerce Reference Store provides customers and CSRs the ability to work with and define complete, accurate and validated orders. The Order handling process allows customers to search and add products to the Shopping cart. The checkout process encompasses applying promotions, calculating taxes, specifying shipping options and the payment options.

4.1.3.6 Level 3: 1.1.1.5.7 - Report Customer Order Handling

Table 4.15 - Level 3: 1.1.1.5.7 - Report Customer Order Handling

LEVEL 3 PROCESS MAPPING DETAILS
1.1.1.5.7 - Report Customer Order Handling

Brief Description

Monitor the status of customer orders, provide notifications of any changes and provide management reports.

Extended Description

The objective of the Report Customer Order Handling processes is to monitor the status of customer orders, provide notifications of any changes and provide management reports. (A)

A CSR or Customer can track the progress of their order through the status updates provided upstream to Siebel CRM from OSM during order execution. For detailed tracking of the execution process the OSM Task Web Client can be used. The Task Web Client provides the user interface for order tracking and operational reporting information.

[*OSM Task Web Client UG*]: (A) About the Task Web Client: 1-1 to 1-4

The 'Viewing Orders' capability in OSM provides real-time visibility of orders, and allows an end-user to find orders, view order histories, and view order reports.

[*OSM Task Web Client UG*]: (A) Viewing Orders: 4-1 to 4-12

These processes are responsible for continuously monitoring the status of customer orders and managing notifications to processes and other parties registered to receive notifications of any status changes. Notification lists are managed and maintained by the Support Order Handling processes. (A)

As OSM processes customer orders, each order is continuously monitored tracking the order status, the execution of each task, the dependencies between tasks, etc.

[*OSM Concepts*]: (A) How OSM Processes an Order: 2-1 to 2-4

OSM provides a comprehensive notification framework. Notifications are used to alert users or systems to processes, orders, or tasks that may be at risk or to events that occur in the system. Notifications can be sent to users or they may trigger an automation plug-in to perform work in an up-stream or down-stream system.

[*OSM Task Web Client UG*]: (A) About Notifications: 3-23 to 3-27

These processes record, analyze and assess the customer order status changes to provide management reports and any specialized summaries of the efficiency and effectiveness of the overall Order Handling process. These specialized summaries could be specific reports required by specific customers. (A)

OSM also provides a dedicated reporting interface to allow reports to be generated using standard ad-hoc query and reporting tools. Using the reporting interface, you can generate order overview, order history, pending order/task, process, task and notification reports. The Reporting Interface augments the reports that are available through the OSM Web Client.

[*OSM Reporting Interface Guide*]: (A) About the OSM Reporting Interface: Sections 1-1 to 1-6

Comprehensive sales and service metrics, pre-integrated through ETL's from the Siebel CRM system, provide the relevant metrics for analysing Orders through Oracle's Business Intelligence Enterprise Edition (OBIEE). For further order handling related management information, reports can be generated and OLAP cubes analysed using the SID certified Oracle Communications Data Model (OCDM).

4.1.3.7 Level 3: 1.1.1.5.8 - Close Customer Order

Table 4.16 - Level 3: 1.1.1.5.8 - Close Customer Order

LEVEL 3 PROCESS MAPPING DETAILS
1.1.1.5.8 - Close Customer Order

Brief Description
Close a customer order when the customer provisioning activities have been completed. Monitor the status of all open customer orders, and recognize that a customer order is ready to be closed when the status is changed to completed. (A)

Extended Description
The objective of the Close Customer Order processes is to close a customer order when the customer provisioning activities have been completed. These processes monitor the status of all open customer orders, and recognize that a customer order is ready to be closed when the status is changed to completed. (A)

Throughout the fulfillment process, OSM maps fulfillment function responses to common statuses, which are then aggregated into order line statuses and order header status values. The status management capability automatically updates the corresponding sales order in CRM with relevant customer status and milestone values. OSM also updates CRM when order lines reach their point-of-no-return (PONR) to prevent the submission of new in-flight revision orders. It also updates CRM with

any enrichment to order lines that may have taken place during fulfillment. Ultimately, when all order components for the order are complete, OSM changes the order to the Completed state and communicates the status to the originating system, in this case Siebel CRM. The 'Track & Manage Customer Order Handling' process will then be responsible for closing the customer order in CRM and performing any post-order completion activities such as generating the customers 'Installed Asset' records.

[Comms O2C Impl Guide]: (A)
- Update Sales Order Overview: Page 16.1 to 16.3
- Understanding the Process Integrations for Sales Order Fulfillment: Page 9.1 – 9.8

4.1.3.8 Supporting Evidence References (Works Cited)

[Siebel Product Administration Guide]   Siebel Product Administration Guide

[Siebel Order Mgmt for Comms Guide]   Siebel Order Management Guide Addendum for
Communications Version 8.1

[*Comms O2C Impl Guide*]   Oracle Communications Order to Cash Integration Pack
Implementation Guide for Siebel CRM, Oracle Order and
Service Management, and Oracle Billing and Revenue
Management 11.3

[Siebel Comms Guide]   Siebel Communications Guide Version 8.1

[Siebel Order Mgmt Guide]   Siebel Order Management Guide Version 8.1

[Siebel CRM IP for OM O2C Impl Guide] Siebel CRM Integration pack for Oracle Order Management:
Order to Cash Implementation Guide

[ATG Merchandising Guide Biz users] ATG Commerce Service Center Guide 10.1.2

[ATG CRS Guide]   ATG Commerce Reference Store Guide 10.1.2

[OSM Task Web Client UG]   Oracle Communications Order and Service Management Task
Web Client User Guide 7.2.2

[OSM Concepts]   Oracle Communications Order and Service Management
Concepts 7.2.2

[OSM Reporting Interface Guide]   Oracle Communications Order and Service Management
Reporting Interface Guide 7.2.2

4.1.3.9 Level 2: 1.1.1.5 - Order Handling - Scores

Table 4.17 - Level 2: 1.1.1.5 - Order Handling - Scores

Level 2: 1.1.1.5 - Order Handling [7/7]		
Level 3 Process	**Level 4 Process**	**L4/L3 Process Score**
1.1.1.5.1 - Determine Customer Order Feasibility		**5**
1.1.1.5.2 - Authorize Credit		**5**
1.1.1.5.4 - Track & Manage Customer Order Handling		**5**
	1.1.1.5.4.1 Manage Customer Order	100%
	1.1.1.5.4.2 Track Customer Order	100%
1.1.1.5.5 - Complete Customer Order		**5**
	1.1.1.5.5.1 Manage Customer Information	100%
	1.1.1.5.5.2 Manage Customer Interaction	100%
1.1.1.5.6 - Issue Customer Orders		**5**
	1.1.1.5.6.1 Assess Customer Order	100%
	1.1.1.5.6.2 Issue Customer Order	100%
1.1.1.5.7 - Report Customer Order Handling		**5**
	1.1.1.5.7.1 Monitor Customer Order Status	100%
	1.1.1.5.7.2 Manage Customer Order Status Notification	100%
	1.1.1.5.7.3 Report Customer Order Status	100%
1.1.1.5.8 - Close Customer Order		**5**

4.1.4   Level 2: 1.1.1.6 - Problem Handling

4.1.4.1 Level 3: 1.1.1.6.1 - Isolate Customer Problem [NOTE: not assessed]

Not assessed.

4.1.4.2 Level 3: 1.1.1.6.2 - Report Customer Problem

Table 4.18 - Level 3: 1.1.1.6.2 - Report Customer Problem

LEVEL 3 PROCESS MAPPING DETAILS
1.1.1.6.2 - Report Customer Problem

Brief Description

Monitor the status of customer problem reports, provide notifications of any changes and provide management reports.

Covered within the body of the Extended Description.

Extended Description

The objective of the Report Customer Problem processes is to monitor the status of customer problem reports, provide notifications of any changes and provide management reports.

These processes are responsible for continuously monitoring the status of customer problem reports and managing notifications to processes and other parties registered to receive notifications of any status changes.

As discussed in response to '1.1.1.6.3 Track & Manage Customer Problem',Escalation times are deadlines that can be manually added to entitlements when they are defined for a customer to ensure that events are automatically escalated to the appropriate parties at the appropriate intervals when the entitlements are associated with an active Service Order. For example, you can automate the following: event escalation; notification of appropriate employees; work routing, assignment, and processing; enforcement of authorization and transition rules.

Siebel Field Service Guide: (A/M)
- Verifying Entitlements: Page 272 to 273

Notification of status changes, escalations, approvals, etc. to individuals can be managed through a users Inbox. A users Inbox is a single screen that shows all approval and notification items assigned to them regardless of the screen where the item originated. Enough detailed information about the item so that they can act on the item from the Inbox and not need to navigate to other screens for more information.

Siebel Apps Admin Guide: (A/M)
- Using the Inbox: Page 129 to 137

Notification lists are managed and maintained by the Support Problem Handling processes.

See Note 3.

These processes record, analyze and assess the customer problem report status changes to provide management reports and any specialized summaries of the efficiency and effectiveness of the overall Problem Handling process.

Oracle Service Analytics provides a series of Dashboards, Reports & Metrics that provide comprehensive insight into the entire Problem Handling process. Pages 12 to 25 in the referenced documentation provides details on contents and typical usage of the Management Dashboards provided as standard, and there are many more examples of service related Executive Reports that are also provided in the subsequent pages in the documentation.

Service Analytics Product Guide: (A/M) - (No download available)
- Service Analytics & Dashboards: Page 12 to 25

These specialized summaries could be creation of specific reports required by customers and/or other specific audiences.

For specialised and ad-hoc Queries, Reports and Dashboards, Oracle Answers (provided as part of Service Analytics) allows end-users to use all pre-build metrics and dimensional attributes to build their own tailored summaries required by customers and other specific audiences.

- Oracle Answers: Page 7 to 11

These processes will make the necessary reports about the problem that occurred, the root cause and the activities carried out for recovery of normal operation.

In this case this process would be supported by an end user using Service Analytics and Oracle Answers to build the necessary report(s) to provide the specific analysis required.

- Oracle Answers: Page 7 to 11

4.1.4.3 Level 3: 1.1.1.6.3 - Track & Manage Customer Problem

Table 4.19 - Level 3: 1.1.1.6.3 - Track & Manage Customer Problem

LEVEL 3 PROCESS MAPPING DETAILS
1.1.1.6.3 - Track & Manage Customer Problem

Brief Description
Ensure that recovery activities are assigned, coordinated and tracked efficiently, and that escalation is invoked as required for any open customer problem reports in jeopardy.

Covered within the body of the Extended Description.

Extended Description
The purpose of the Track & Manage Customer Problem processes is to ensure that recovery activities are assigned, coordinated and tracked efficiently,

Within Oracle's RODOD solution the tracking & management of customer problems is primarily managed through Siebel CRM's TroubleTicket& Service Request capabilities. Siebel Communications Service Requests and Trouble Tickets are used by customer service representatives (CSRs) and their managers, as well as network operations center (NOC) agents. Trouble tickets are typically used to record and track problems with the functioning of services and networks, whereas service requests

are typically used to record and track general customer problems and requests. Examples of general problems and requests are billing problems, requests for new equipment, and requests for billing statements.

Siebel Comms Guide: (A/M)
- Service Requests & Trouble Tickets: Page 163 to 166

and that escalation is invoked as required for any open customer problem reports in jeopardy.

Escalation times are deadlines that can be added to entitlements to ensure that events are escalated to the appropriate parties at the appropriate intervals. For example, you can automate the following: event escalation; notification of appropriate employees; work routing, assignment, and processing; enforcement of authorization and transition rules.
Importantly, escalation warnings are signalled before a contractual commitment has been breached.

Siebel Field Service Guide: (A/M)
- Escalation Times: Page 248

Responsibilities of these processes include, but are not limited to

- Scheduling, assigning and coordinating tracking any recovery activities, and any repair and restoration activities delegated to other processes;

The Siebel Assignment Manager is a fully integrated assignment engine built into Siebel CRM that can be used for automatically assigning appropriate individuals to tasks based on a comprehensive set of criteria (e.g. skills, location, availability, workload, etc.). This engine is used across Sales, Service & Marketing domains.

Siebel Assignment Manager Guide: (A)
- Overview of Siebel Assignment Mgr: Page 23 to 40

In the context of Customer Service; Service Requests can often be resolved by the first customer service representative (CSR) who services the customer. However, when the request cannot be resolved, or when the service request is logged through the Internet, ownership must be transferred to a service representative who possesses the expertise to handle the request. This is managed automatically by the Siebel Assignment Manager.

Siebel Assignment Manager Guide: (A)
- Service Scenario: Page 21 to 22

In the event that a Field Service engineer is required to resolve a customer's problem a Service Request will be manually created and managed / scheduled appropriately. For example:

1. *Service request activities are created either manually or semi-automated via activity templates thro*
2. *Automatic verification of the service level agreements for the customer will be performed.*
3. *Based on the diagnosis of the problem and the service level agreement, manual creation of a retur*
4. *Orders can be manually created to ship the replacement parts to the customer or the field engineer*
5. *Dispatch activities can be automatically assigned (with manual verification if required) to a field en*

Siebel Field Service Guide: (A/M)

- Overview of Field Service: Page 27 to 35

- Generating the respective service trouble report creation request(s) to Create Service Trouble Report based on specific customer problem reports;

Grouping several trouble tickets under one parent can be useful for managing a single network problem that results in calls from many customers. Siebel CRM supports the ability to associate parent and child Trouble Tickets to support this process. If a generic Service Trouble Ticket (or Problem Report) needs to be created to resolve a series of specific Customer Trouble Tickets (or Problem Reports), an end user should create the required Parent Service Trouble Ticket. Once this is created the user should manually select the affected Customer Trouble Tickets from the Trouble Ticket list viewand associate these with the newly created Service Trouble Tickets.

Siebel Comms Guide: (A/M)
- Parent & Child Trouble Tickets: Page 168 to 169

Once this parent/child relationship is established between the Parent Service Trouble Ticket and the Child Customer Trouble Tickets, when the Service Trouble Ticket is resolved, this resolution can cascade down to the related Customer Trouble Tickets. An example scenario covering this process is provided in the documented reference.

Siebel Comms Guide: (A/M)
- Scenario for Service Requests and Trouble Tickets: Page 165

- Undertake necessary tracking of the execution progress;

When a Trouble Ticket or Service Request is created against a customer's account all activities connected with the issue are recorded, i.e. the CSP's entire response across activities, orders, parts movement, assignments, etc.

Siebel Field Service Guide: (A/M)
- Service Support: Page 48 to 60

Siebel CRM also provides a fully automated audit trail capability to track the history of the changes that have been made to service requests. An audit trail is a record showing which operation was performed, when it was performed, and how the value was changed.

Siebel Field Service Guide: (A/M)
- Audit Trail: Page 43 to 44

- Modifying information in an existing customer problem report based on assignments;

When working with Trouble Tickets and Service Orders, Activities can be used to assign and manage tasks associated with resolving the customer's issue. For example, if a task requires multiple steps that one or more people might carry out, activities greatly simplify the job. Activities can help:

- *Define and assign the task*
- *Provide information to complete the task*
- *Track the progress of the task*
- *Track costs and bill for the task*

[Siebel Field Service Guide](): (A/M)
- Field Service Activities: Page 63 to 80

Activities can be manually added to a Trouble Ticket or Service Request, or Activity Templates can be used to automatically generate the Activities (or Activity Plans) required to resolve a problem based on pre-defined templates. This will drive the activities required to resolve the Trouble Ticket or Service Request associated with the Activities, updates to the TT or SR will be made manually by the user as they work through their assigned activities.

[Siebel Field Service Guide](): (A/M)
- Activity Templates: Page 64 to 65

- Modifying the customer problem report status;
- Canceling a customer problem report when the specific problem was related to an incorrect customer problem report; and

These manual modifications and update requirements are supported through standard Trouble Ticket and Service Order management.

[Siebel Comms Guide](): (A/M)
- Closing a Trouble Ticket: Page 172

- Monitoring the jeopardy status of open customer problem reports, and escalating customer problem reports as necessary.

Entitlements in Siebel CRM can be defined to automatically determine the level of service a customer is entitled to receive (e.g. for what products and services, response time, restore time, etc.). Escalation times are deadlines that can be manually added to entitlements when they are defined for a customer to ensure that events are automatically escalated to the appropriate parties at the appropriate intervals when the entitlements are associated with an active Service Order. For example, you can automate the following: event escalation; notification of appropriate employees; work routing, assignment, and processing; enforcement of authorization and transition rules.Importantly, escalation warnings are signalled before a contractual commitment has been breached.

[Siebel Field Service Guide](): (A)
- Verifying Entitlements: Page 272 to 273

Note that some specific product and/or service components may be owned and managed by suppliers/partners. In these cases the Track & Manage Customer Problem process is responsible for initiating requests…

The Siebel Partner Relationship Management (PRM) module automates and streamlines the relationship between CSPs and their channel and alliance partners, distributors, resellers, agents, brokers, or dealers. You can use Siebel PRM to manage two types of service requests:

- *Customer Service Requests: Customers will sometimes log service requests that your partners are either solely or partly responsible for. You can refer customer service requests to partners, work on them collaboratively with partners, or track service requests that partners have logged on behalf of your customers.*

- *Partner Service Requests: Partners will sometimes log service requests that you must respond to. For example, partners may have questions about your products or about the partnership, or they may need other forms of service.*

Service Requests can be manually assigned to Partners but it is generally better to use Siebel Assignment Manager to automatically assign the service request by creating rules based on geography, partners' skills, expertise in a specific product, language ability, territory, workload and availability, or other criteria.

Siebel PRM Guide: (A/M):
- Page 223 to 242

…through S/P Problem Reporting & Management processes for restoration and recovery by the supplier/partner of the specific service components

See Note 3.

These processes will co-ordinate all the actions necessary in order to guarantee that all tasks are finished at the appropriate time and in the appropriate sequence.

As described above, Trouble Tickets and Service Orders co-ordinate all the actions required to be completed (and their sequence) through Activities, and Entitlements drive automated workflows to ensure all tasks are completed in a timely manner to avoid breaches in agreed SLA's.

The Track & Manage Customer Problem processes will also inform the Close Customer Problem processes by modifying the customer problem report status to cleared when the customer problem has been resolved.

Once all Activities associated with a Customer Problem Report (Trouble Ticket or Service Request) have been completed then the 'Close Customer Problem' processes can close the corresponding Problem Report.

Siebel Comms Guide: (M)
- Closing a Trouble Ticket: Page 172

4.1.4.4 Level 3: 1.1.1.6.4 - Close Customer Problem Report

Table 4.20 - Level 3: 1.1.1.6.4 - Close Customer Problem Report

LEVEL 3 PROCESS MAPPING DETAILS
1.1.1.6.4 - Close Customer Problem Report

Brief Description

Ensure that a problem affecting the customer is solved

Covered within the body of the Extended Description.

Extended Description

The purpose of the Close Customer Problem Report processes is to close a customer problem report when the problem affecting the customer is solved.

Resolving a trouble ticket may require several manual procedures, performed by more than one person or group. End users can create an activity for each step and assign the activity to themselves, another qualified person, or a group.

Activity plans consist of a list of activities to be completed to resolve a problem. If an appropriate activity template exists, end users can select the template to populate their activities list with a defined set of activities. Then end users can customize the list, if necessary.

Once all Activities associated with a Customer Problem Report (Trouble Ticket or Service Request) have been completed then the corresponding Problem Report can be manually closed. Once closed further changes cannot be made unless it is re-opened.

Siebel Comms Guide: (A/M)
Resolving &Closing Trouble Tickets: Page 171 to 172

These processes are also responsible for possibly contacting the customer to inquire about the customer's satisfaction with resolution of the problem.

As part of closing a trouble ticket, end users can conduct a customer survey in person, or they can use the Correspondence screen to send a letter and survey to the originator of a trouble ticket. When they mail a survey, an activity is automatically generated for the mailing.

Siebel Comms Guide: (A/M)
• Customer Satisfaction Survey: Page 172 to 173

These processes monitor the status of all open customer problem reports and recognize that a customer problem report is ready to be closed when the status is changed to cleared.

See the above reference to closing Trouble Tickets. When a service request or trouble ticket is broken down into different activities, the agent can monitor progress towards completion of the activities and close the service request or trouble ticket once all activities are completed/cleared.

4.1.4.5 Level 3: 1.1.1.6.5 - Create Customer Problem Report

Table 4.21 - Level 3: 1.1.1.6.5 - Create Customer Problem Report

LEVEL 3 PROCESS MAPPING DETAILS
1.1.1.6.5 - Create Customer Problem Report

Brief Description

This process creates a new Customer Problem Report.

Covered within the body of the Extended Description.

Extended Description

The objective of the Create Customer Problem Report process is to create a new customer problem report.

A new customer problem report may be created as a result of customer contacts indicating a problem with their purchased product offerings

Depending on the type of problem being reported by a customer, the appropriate service related problem report will be initiated within Siebel CRM; i.e. a Trouble Ticket for tracking problems with the functioning of services and networks, or a Service Request where Field Service assistance is required for resolving the customer's problem. Service requests and trouble tickets can be created within Siebel by:

- *Customers using Self-Service e.g. Siebel E-Support (Automatic)*
- *Customers using an Automated Call Distributor (ACD) and/or IVR (Semi-Automatic)*
- *Call Centre agents responding to customer phone calls (Manual)*
- *Call center agents responding to customer email from customers (Semi-Automatic)*

Creating a customer problem report from a customer email is streamlined through the use of Siebel Email Response. When customers send with details of a problem, Siebel Email Response automatically routes the email to the correctly skilled agents, allowing them to respond and react immediately.

Siebel Comms Guide: (A/M)
- Service Requests & Trouble Tickets: Page 164

or, at the request of analysis undertaken by other processes in the CRM or SM&O horizontal process layers, which detect a failure or degradation which may be impacting customers.

Other process layers may initiate the creation of Trouble-Tickets, for example when service failures or service degradation is detected. Specific supported examples include:

- *NOC agents responding to network problems create a Trouble-Ticket (Manual)*
- *A network communications management system that is integrated with Siebel Communications to automatically create a Trouble-Ticket (Automatic)*

Siebel CommsGuide: (A/M)
- Service Requests & Trouble Tickets: Page 164

The automatic creation of Trouble-Tickets by external systems such as a network management

system is enabled through the published 'SWITroubleTicket' Siebel web service.

SWITroubleTicket

These processes are responsible for capturing all the necessary customer information to be includedin the new Customer Problem Report.

As described in the documented scenario for Service Requests & Trouble Tickets, Siebel provides extensive support for capturing all the necessary customer information when logging a customer problem report. Much of the data collection will be manual, but workflows are provided where appropriate that helps to automate Service Request & Trouble Ticket management (e.g. auto creation and auto assignment of TT's & SR's).

Siebel Comms Guide: (A/M)
Scenario for Service Requests & Trouble Tickets: Page 165 to 166

4.1.4.6 Level 3: 1.1.1.6.6 - Correct & Recover Customer Problem [NOTE: not assessed]

Not assessed.

4.1.4.7 Supporting Evidence References (Works Cited)

[Siebel Field Service Guide]   Siebel Field Service Guide 8.1

[Siebel Apps Admin Guide]   Siebel Application Administration Guide 8.1

[Siebel Comms Guide]   Siebel Communications Guide Version 8.1

[Siebel Assignment Manager Guide]   Siebel Assignment Manager Administration Guide 8.1

[Siebel PRM Guide]   Siebel Partner Relationship Administration Guide 8.1

[SWITroubleTicket]   Primary Siebel CRM Web Services

4.1.4.8 Level 2: 1.1.1.6 - Problem Handling - Scores

Table 4.22 - Level 2: 1.1.1.6 - Problem Handling - Scores

Level 2: 1.1.1.6 - Problem Handling [4/6]		
Level 3 Process	**Level 4 Process**	**L4/L3 Process Score**
1.1.1.6.1 - Isolate Customer Problem		0
1.1.1.6.2 - Report Customer Problem		**5**
	1.1.1.6.2.1 Monitor Customer Problem	100%
	1.1.1.6.2.2 Distribute Customer Problem Notifications	100%
	1.1.1.6.2.3 Distribute Customer Problem Management Reports & Summaries	100%
	1.1.1.6.2.4 Notify Customer Problem	100%
	1.1.1.6.2.5 Issue Customer Problem Management Summaries	100%
	1.1.1.6.2.6 Generate Customer Problem Management Reports	100%
1.1.1.6.3 - Track & Manage Customer Problem		**5**
	1.1.1.6.3.1 Coordinate Customer Problem	100%
	1.1.1.6.3.2 Cancel Customer Problem	100%
	1.1.1.6.3.3 Escalate/End Customer Problem	100%
	1.1.1.6.3.4 Monitor Customer Problem Jeopardy Status	100%
1.1.1.6.4 - Close Customer Problem Report		**5**
	1.1.1.6.4.1 Contact Customer for Feedback	100%
1.1.1.6.5 - Create Customer Problem Report		**5**
1.1.1.6.6 - Correct & Recover Customer Problem		0

4.2 Level 1: Marketing & Offer Management

4.2.1 Level 2: 1.2.1.5 - Product & Offer Development & Retirement

4.2.1.1 Level 3: 1.2.1.5.1 - Gather & Analyze New Product Ideas [NOTE: not assessed]

Not assessed.

4.2.1.2 Level 3: 1.2.1.5.2 - Assess Performance of Existing Products

Table 4.23 - Level 3: 1.2.1.5.2 - Assess Performance of Existing Products

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LEVEL 3 PROCESS MAPPING DETAILS
1.2.1.5.2 - Assess Performance of Existing Products

Brief Description
Analyze the performance of existing products to identify inadequacies and required improvements

Covered within the body of the Extended Description.

Extended Description
The Assess Performance of Existing Products processes analyze the performance of existing products to identify inadequacies and required improvements. These processes use information from customers and from operational activities to identify required improvements.

Comprehensive sales and service metrics, pre-integrated through ETL's from the Siebel CRM system, provide the necessary insight to assess the performance of products from a sales, service (cost to serve),and customer feedback perspective.

OBIEE Metrics: (A)
- **Sales Products: Page 272 to 274**
- **Svc Requests:Page 306 to 309**

Specific examples of reports that can be used by an end-user to assess the performance of products from a sales, service and customer perspective include:

Sales:
- *Avg. Order Discount & Margin by Product Line*
- *Avg. Order Selling Price by Product Line*
- *Avg. Line Item Order Size by Product Line*
- *Avg. Sales Cycle by Product Line*
- *Win Rate by Product Line*
- *Reason Won by Product Line*
- *Reason Lost by Product Line*

Sales Analytics Product Guide: (A/M)
- **Page 73**
- **Page 74**
- **Page 75**
- **Page 76**
- **Page 77**

- **Page 78**
- **Page 79**

Service:
- *Customer Satisfaction by Product Line*
- *Top 10 Serviced Products*
- *Top 10 Product Lines with Open-Critical SRs*
- *Open-Critical SRs by Product Line*
- *Service Requests by Product Line*
- *Resolution Time*

Service Analytics Product Guide: (A/M)
- **Page 61**
- **Page 77**
- **Page 78**
- **Page 79**
- **Page 80**
- **Page 81**

In additional to the Siebel pre-built analytics, the Oracle Communications Data Model (OCDM) offers a SID certified Intelligent Data Warehouse package that is tightly integrated with the business intelligence platform. With pre-built data mining, Oracle Online Analytical Processing (Oracle OLAP) and dimensional models, Oracle Communications Data Model provides you with industry-specific metrics and insights that you can use to perform detailed analysis around all aspects of product viability. Assets that would be particularly useful for analysing a products performance in OCDM include: Customer Acquisition Cube (p9-81), Revenue Cube (p9-110), Subscriber Churn Statistic Cube (p9-122), Product Management Sample Reports (p12-50).

 [*OCDM*]**: (A/M)**
- **OLAP Cubes: 9-1 to 9-143**
- **Sample Reports: 12-1 to 12- 98**

4.2.1.3 Level 3: 1.2.1.5.3 - Develop New Product Business Proposal [NOTE: not assessed]

Not assessed.

4.2.1.4 Level 3: 1.2.1.5.4 - Develop Product Commercialization Strategy

Table 4.24 - Level 3: 1.2.1.5.4 - Develop Product Commercialization Strategy

LEVEL 3 PROCESS MAPPING DETAILS
1.2.1.5.4 - Develop Product Commercialization Strategy

Brief Description

Ensure that product specific pricing, sales channel support and regulatory approvals are identified and agreed

Covered within the body of the Extended Description.

Extended Description

The Develop Product Commercialization Strategy processes ensure that product specific pricing, sales channel support and regulatory approvals are identified and agreed. These processes ensure that all commercialization aspects of the product development process associated with selling the product to the market, including pricing, rating, identification of sales support and sales channels features, are developed and agreed.

The Product Lifecycle Management capabilities are used to systematically drive the Product Commercialization Strategy process. An item lifecycle can be defined by an administrator to mirror the required Product Commercialization Strategy process, expressed as a series of phases, each phase represents a set of tasks and deliverables that are required before promoting the item to the next phase. For example, the lifecycle phases for a new products commercialization might be: Seek Regulatory Approval, Define Merchandising Strategy (e.g. pricing, rating, channels& features), Define Sales Support, Final Approval, and Release to Development.

[PLM Impl Guide](): (A/M)
- **Page 3-26 to 3-27**

Administrators create lifecycles to manage the lifecycle phases of items and item revisions. For example, a Product Managerwill develop a specific lifecycle to support the Product Commercialisation Strategy process while having another lifecycle to manage the Product Development/Specification process.

[PLM Impl Guide](): (A/M)
- **Page 3-28 to 3-31**

Additionally these processes manage the enterprise cross-product pricing approval processes.

Role based security and change management approval routings can be used to support the enterprise cross-product pricing approval processes, where one or all people in a group must approve pricing changes or recommendations, or all people in a group should be notified of a change. Role-based data security is provided, enabling users to secure individual data elements. Every item is secured using role-based data security. Your ability to view, edit and perform certain actions on an item is determined by your role on it.

[PLM Impl Guide](): (A/M)
Page 11-1 to 11-3

To summarise, through leveraging the Product Lifecycle Management, Role Based Security, Change Management and workflows, the process of managing the product commercialisation strategy can

be tightly controlled and automated across the organisation and also include 3rd parties such as partners and suppliers.

4.2.1.5 Level 3: 1.2.1.5.5 - Develop Detailed Product Specifications

Table 4.25 - Level 3: 1.2.1.5.5 - Develop Detailed Product Specifications

LEVEL 3 PROCESS MAPPING DETAILS 1.2.1.5.5 - Develop Detailed Product Specifications

Brief Description

Develop and document the detailed product-related technical, performance and operational specifications, and customer manuals.

Covered within the body of the Extended Description.

Within the Oracle RODOD solution the Product Hub for Communications is used as an enterprise data management solution that enables customers to centralize and master all product information from heterogeneous systems, creating a single view of product information that can be leveraged across all functional departments. The Oracle Product Hub for Communications release is focused on the Communications industry, and the referenced whitepaper has been provided as background to the verticalisation provided in this release.

OPH for Comms Whitepaper:
• **Page 5**
(Available to customers & partners at support.oracle.com)

Extended Description

The Develop Detailed Product Specifications processes develop and document the detailed product-related technical, performance and operational specifications, and customer manuals.

Oracle's Product Hub for Communications is the primary application that an end-user will use to develop detailed product specifications. Oracle enables you to define hierarchical taxonomies of products, components, and items within the Item Catalog. The Item Catalog contains all the items in the system.

PLM Impl Guide: (M)
• 3-1

The definition of product specifications start with an 'Item Catalog Category' or 'ICC'. ICC's can be thought of as 'Product Classes', and these provide metadata common to all items that share the category. ICC's are hierarchically structured, with characteristics (attribute groups, attributes, value sets, functions, pages, lifecycles, criteria templates, and result formats) being inherited throughout the hierarchy.

PLM Impl Guide: (M)
• 3-3 to 3-4

Oracle provides a pre-seeded metadata library that contains attribute groups, attributes, and value sets specifically designed to support the definition of detailed product specifications for the

Communications industry. For reference you can view the complete pre-seeded attribute library that comes with the product in Section F of the Product Hub Implementation Guide.

PIM Impl Guide: (M)

- 4-31

If a CSP needs to create new attributes and attribute groups to support the detailed product specification process then an administrator can do so and associate these to the appropriate ICC's. Attributes and attribute groups can be defined for capturing any type of product related data covering all aspects of technical, performance and operational specifications.

PIM Impl Guide: (M)

- 4-17 to 4-19

Value-sets are used to ensure that as attributes are captured against item definitions by an end-user, validation can be automatically performed. Attributes can have a static or dynamic list of valid values, or a range of values. For each user-defined attribute, you can optionally specify a value set with data type and validation rules to be applied when the user inputs data. Once created, value sets can be reused for different attributes.

PLM Impl Guide: (M)

- Page 3-4 to 3-5

Product Hub also provides specific functionality to support the management of documents as part of this process, for example the development of customer manuals, technical documentation, data-sheets, etc. Document Management and Collaboration (DOM) enables the storing, organizing, and sharing of product information, including unstructured data such as files, internet links, and images. DOM uses a content repository to store files and it uses Change Management to control changes to documents and files.

PLM Impl Guide: (M)

- Page 8-1 to 8-3

To summarise, using the basic building blocks described above; the Item Catalog, Item Catalogue Categories, Attribute Groups, Attributes and Value-sets the Product Hub allows the end-user to document detailed product-related specifications in a structured way. Many of the industry specific attributes that are required to be captured during product specification are provided as standard through a pre-seeded metadata library, but the tool provides a flexible framework to extend these attributes as required by a CSP. DOM can be used to collaborate on the creation of product related documentation leveraging Change Management to control changes to documents and files.

Below we will describe how the Product Hub and Product Lifecycle Management will help the end-user to define the detailed product specifications using the basic building blocks described above.

These processes develop and document the required product features, the specific service and resource requirements and selections, the specific performance and operational requirements and support activities, any product specific data required for the systems and network infrastructure.The processes ensure that all detailed specifications are produced and appropriately documented.

To ensure that all the required detailed product specifications are produced and documented, Product Lifecycle Management features are used to systematically drive this process. An item lifecycle is defined by an administrator as a series of phases, each phase represents a set of tasks and deliverables that are required before promoting the item to the next phase. For example, the

lifecycle phases for a new promotion lifecycle might be: Concept, Design, Trial, Pre-Production, Production, and Retirement.

PLM Impl Guide: (A/M)
- Page 3-26 to 3-27

Administrators create lifecycles to manage the lifecycle phases of items and item revisions. For example, you may have one lifecycle at the item level to manage new product introductions while having another lifecycle to manage the product revision process. Associating a lifecycle with an item catalog category (ICC) makes the lifecycle available for all items in the ICC. Lifecycles are inherited throughout the item catalog category hierarchy. For each lifecycle associated with an ICC, a Change Policy can be defined to specify for each lifecycle phase of the item whether a change is allowed or not allowed or is possible only through a change order. Administrators can define and update item change policies for item catalog categories. These item change policies determine the rules for how and when an item's attributes, attachments, and associations are changed. For example, a CSP launching a brand new service that has hundreds of specifications may wish to define item change policies for the different phases of the product launch. So when the service is in the concept or design phase, many of the attributes are allowed to change without formal approval, and the lifecycle policy is not very restrictive. When the service progresses to the 'Trial' phase, the CSP might wish to place all attributes, attachments, and associations under stricter change control, perhaps requiring a change order for all modifications. Later, when the service is launched to the market and in the 'Production' phase, the CSP will likely want every facet of the service specification under tight control.

PLM Impl Guide: (A/M)
- Page 3-28 to 3-31

Role based security is also used which is particularly useful in change management approval routings, where one or all people in a group must approve a change, or all people in a group should be notified of a change. Role-based data security is provided, enabling users to secure individual data elements. Every item is secured using role-based data security. Your ability to view, edit and perform certain actions on an item is determined by your role on it.

PLM Impl Guide: (A/M)
- Page 11-1 to 11-3

New Item request is a workflow process, which allows you to route the definition and approval of a new item. When creating a new item, various aspects of an item like base attributes, user-defined attributes, etc. could be defined by various people in the organization using a workflow process. The definition routing and approval routing could be combined in a new item request workflow.

PLM Impl Guide: (A/M)
- Page 3-31 to 3-33

To summarise, through leveraging the Product Lifecycle Management, Role Based Security, Change Management and New Item Request framework and workflows, the process of producing detailed product specifications can be tightly controlled and automated across the organisation and also include 3rd parties such as partners, suppliers and customers. Product Hub for Communications provides the framework for managing the product specification process and co-ordinating activities across the primary actors participating in the process (e.g. Product Managers across different domains; commercial, technical, operations, etc.).

Each individual participating in the Product Specification process will use the UI's provided by

Product Hub to define the required product specifications, and workflow, approvals and security will help to systematically drive this process. References have been provided from the user guide on how an end user would perform some of the key tasks when defining a product specification:

- *Creating New ICC's*
- *Creating New Items*
- *Creating Change Requests*
- *Creating Documents*

[*PLM User Guide*]: (M)
- 1-2
- 8-10 to 8-15
- 10-11 to 10-19
- 14-42 to 14-47

To summarise, Product Hub for Communications combined with the Product Lifecycle Management& Change Management capabilities facilitates the process of automating and guiding the process of developing detailed product specifications, ensuring that all specifications are produced appropriately based on the CSPs requirements.

<mark>Additionally the processes ensure that the documentation is captured in an appropriate enterprise repository.</mark>

All structured product data is stored within the Product Hub's database which acts as the single master product record. Oracle advocates the use of DOM (as described above) and a Content Management repository for the management and storing all unstructured data (e.g. documents, user manuals, project plans, etc.) relating to products and services. Oracle supports the WebDAV standard to enable users to collaboratively manage files, and provides pre-integration to WebDAV CMS's such as the Oracle ContentDB or Oracle's Unified Content Management (UCM).

PIM User Guide: (A)
- 7-1 to 7-26

This section explains how Product Hub uses the attachments feature to associate unstructured data (files, folders, URLs, etc.) with attributed products and services via a Content Management repository.

4.2.1.6 Level 3: 1.2.1.5.6 - Manage Product Development

Table 4.26 - Level 3: 1.2.1.5.6 - Manage Product Development

LEVEL 3 PROCESS MAPPING DETAILS
1.2.1.5.6 - Manage Product Development

Brief Description
<mark>Ensure the co-coordinated delivery in line with the approved business case of all required product capabilities for that business case across the enterprise</mark>

Covered within the body of the Extended Description.

Extended Description

The Manage Product Development processes ensure the co-coordinated delivery in line with the approved business case of all required product capabilities for that business case across the enterprise.

In some cases the management of the Product Development process may be adequately supported through the Product Lifecycle Management capabilities described as part of the 'Develop Detailed Product Specifications' above. For more complex Product Development initiatives Oracle advocates the use of Oracle Project Management to maintain control & visibility of all aspects of a Product Development project. Oracle Projects is part of the same family of products as Product Hub for Communications and Product Lifecycle Management, it is fully integrated but can be deployed as an optional component of the core RODOD stack based on a CSPs requirements.

To ensure the co-ordinated delivery with the approved business case for a Product Development, a project manager can plan and monitor project information enabling them to track and manage a project through the project lifecycle, from creating and planning, through to completion.

Project Management Guide: (A/M)
- 1-1 to 1-2

Budgeting and forecasting is supported allowing a project manager to create budgets and forecasts to manage the financial performance of a project throughout the project lifecycle aligned to the approved business case. The project manager has the flexibility to create multiple budgets and forecasts for a project to demonstrate different scenarios. The PM can track project status and performance by comparing project budget and forecast amounts to actual amounts using Project Performance Reporting and Project Status Inquiry features.

Project Management Guide: (A/M)
- 1-3 to 1-4

These processes use project management disciplines to deliver the necessary capabilities, including process development, specific systems & network infrastructure developments, specific channel developments, specific operational procedures, etc. required to support the new product.

A project manager has the ability to define workplans for a project, which is a hierarchical grouping of tasks within a project. The PM can manually define a unique workplan for each of their projects, or alternatively to accelerate the process use pre-defined templates (maybe based on a previous project that had successfully developed a similar product). A PM can create tasks, or copy tasks from other projects and templates to save additional time. Workplans will drive the activities undertaken and completed by the project team and provide visibility of the progress of the project.

Individual projects and workplans can be created by the PM to cover different aspects of a complete program of work, for example as specified in the eTOM text a PM may define individual workplans for process development, systems infrastructure, network infrastructure, channel development, etc. each required to support the ultimate launch of the new product.

Project Management Guide: (A/M)
- 2-1 to 2-3

Progress is used to collect and report on the progress of workplans to help assess if execution is on track from both a task completion and financial perspective. These completion targets should be aligned to the agreed business case.

Project Management Guide: (A/M)
- 2-39 to 2-41

In order to bring together potentially multiple workplans and projects, Program Management allows a collection of projects to be linked in a hierarchical fashion. The Oracle Projects program management functionality enables a PM to create a program by linking multiple projects to form a program hierarchy.

Project Management Guide: (A/M)
- 3-1 to 3-2

Programs enable PM's to view and manage workplan and financial information for a group of projects. You can track and report on rolled-up planned, actual, and forecasted effort, cost, and revenue, as well as progress and schedule information for all projects in the program hierarchy. Therefore, as a program manager, you have a strategic focus on the overall program, rather than a tactical project-centric focus.

It is predominantly a program/project management function, with the detailed management of individual capability delivery managed through separate processes in other horizontal process groupings.

See Note 2: The program and project management of a product launch is closely related to process of developing the detailed product specification; certainly this will be one 'process-grouping' of the overall product launch program.

To help connect the 'Product Specification' & 'Manage Product Development' processes Oracle Projects can be linked to Oracle Product Lifecycle Management. CSPs can create their own lifecycle phases for product introductions, once the lifecycle phases have been defined, you create a lifecycle in Oracle Projectsthat controls how, when and by whom new products can be defined and attributed within the Product Hub.

PLM Impl Guide: (A/M)
- Page 3-28 to 3-29

Note that delivery of products within the context of existing commercial arrangements is managed through the Supply Chain Development and Change Management process. If new suppliers/partners are required, the Supply Chain Capability Delivery process is used to deliver the necessary commercial arrangements.

See Note 3: The Supply Chain Development and Change Management process is not part of this initial certification.

Note that the management of major new or enhanced infrastructure development to support Product & Offer Development is managed within the Product & Offer Capability Delivery process

See Note 3: The Product & Offer Capability Delivery process is not part of this initial certification.

4.2.1.7 Level 3: 1.2.1.5.7 - Launch New Products

Table 4.27 - Level 3: 1.2.1.5.7 - Launch New Products

LEVEL 3 PROCESS MAPPING DETAILS
1.2.1.5.7 Launch New Products

Brief Description

<mark>Manage the initial introduction of new and enhanced products into the market and handover to operations for ongoing rollout</mark> **(A/M)**

Covered within the body of the Extended Description.

[RODOD Whitepaper]:   *Page 14 to 16*

For background, this section of the RODOD whitepaper provides a high-level overview of the Product Launch process in the context of this solution.

Extended Description

<mark>The Launch New Products processes manage the initial introduction of new and enhanced products into the market and handover to operations for ongoing rollout.</mark> **(A/M)**

When new products are launched there is a requirement to take the design time definition of products and services in the Product Hub, and have these synchronized to the operational systems (e.g. CRM, ERP, Billing, Service Fulfillment), ready for handover to operations. Oracle automates this process across our applications through the Application Integration Architecture Product MDM Process Integration Pack, a core component of the RODOD solution.

[P-MDM Integration Impl Guide]: (A/M) Page 3.8 -3.11

As described in the 'Develop Detailed Product Specifications' process, in Product Hub for Communications the building blocks for product and service attribution come from 'Item Catalog Categories' or ICC's. ICC's can be thought of as 'Product Classes', and these provide metadata common to all items that share the category. ICC's are hierarchically structured, with characteristics (attribute groups, attributes, value sets, functions, pages, lifecycles, criteria templates, and result formats) being inherited throughout the hierarchy. Therefore when launching new products, the related class information must be shared/published with the relevant operational systems. As default Oracle supports the publication of ICC data to Siebel CRM, but other target systems can be added to the publication framework by a CSP. ICC data will include relationships/structure under the ICC, attribute groups, attributes (seeded, user-defined & transactional), value-sets, etc. During the product launch process a Product Administrator will publish all ICC data related to the product launch in Product Hub to Siebel CRM using the publication-framework user interface and the out-of-the-box AIA-based integration.

[P-MDM Integration Impl Guide]: (A/M) Page 2.2 -2.10

In Product Hub once your ICC's and associated meta-data is defined Product Manager's will define and attribute the details of the new products and services being launched. This will be done in the 'Develop Detailed Product Specifications' process by creating items, BOMs, attribute values, value overrides, exclusion rules, compatibility rules, billing products, billing discounts, etc. This is the

core product data that will be required by operations and the operational systems such as CRM, Billing, and ERP when products are launched. Again, Oracle provides out-of-the-box integration from Product Hub to CRM, Billing and ERP to automatically publish this product data as part of the product launch process. The Product Administrator uses the same publication-framework UI to select the products he/she wishes to publish/launch, and which target systems the product data should be published to.

 [Comms O2C Impl Guide]: *(A/M)Page 6.1 – 6.5*

As part of the product launch process the product classes (ICC's) and all associated metadata such as attributes, value-sets pushed to Siebel from Product Hub also needs to be used within the Service Fulfillment domain to drive the order fulfillment process. This documentation explains how the product to service mapping specialist in OSM will query/import the product class and the associated transaction attributes from Siebel into a cartridge using the OSM design-time environment. The product to service mapping specialist will map the product class to a product specification in the cartridge. The product specification is used to associate decomposition rules, fulfillment functions and their dependencies. Once all the design time setup is completed the cartridge is deployed as part of the product launch process to support the run-time fulfillment of customer orders.

In summary, the focus of this process is to take the detailed product specifications developed in '1.2.1.5.5 Develop Detailed Product Specifications' and ensure that these are synchronized to the various operational systems such as Siebel CRM, Billing & Revenue Management, and Order & Service Management as part of the Product Launch process.

The initial introduction could be through commercial pilots or market trials, in which case the commercial negotiations for the pilot and/or trial are managed through these processes. *(A/M)*

[Siebel Marketing User Guide]: *(A/M) Page 15 - 18*

Siebel Marketing can be used to define and execute stand-alone marketing campaigns to trial the launch of new products / promotions. Segmentation and eligibility rules can be used to identify control groups for the product trial, and promotional pricing defined across the groups to test market acceptance.

[Siebel Marketing User Guide]: *(A/M) Page 19 – 23*

The actual commercial negotiations for any pilot and/or trial product launch are typically manual processes supported & managed through the Planning & Budgeting capabilities provided as part of the Siebel Marketing solution. The Marketing Planning module can be applied to fit any organizational planning approach, including plans based on funding, budgets, time periods, business units, product lines, etc.

These processes identify the shortcomings or issues, and manage the necessary improvements to the product to allow full rollout. *(M)*

- *(M)*

As the results of the trials are analyzed, appropriate adjustments to the products and services being launched can be manually made by a Product Manager through the Product Hub to fine

tune the proposition that will be finally launched.

At the conclusion of the pilots and/or trials when the product passes its acceptance tests or defined acceptance criteria, these processes manage the handover to operations. *A/M*

[*P-MDM Integration Impl Guide*]: *(A/M) Page 3.8 -3.11*
 [*Comms O2C Impl Guide*]: *(A/M) Page 6.1 – 6.5*

Once the products and services have been finalized based on the results of the trial, and are ready to be launched – the final revision of the products and services need to be pushed to the downstream operational systems. As mentioned above, the Oracle Product MDM PIP publishes the final product definitions to downstream systems such as Siebel CRM, Billing & Revenue Management (BRM) & E-Business Suite (EBS), and any updates to the product classes (less frequent) can be pulled into Order & Service Management (OSM).

Once accepted as a stable product offering, rollout and/or expanded of the product to subsequent customers is managed by the Operations Support & Readiness processes.**AM**

See Note: Here we are describing the process up until the point where products are published to the operational systems and handed over to the Operations Support & Readiness processes.

[*ATG Web Commerce Product Catalog Integration*] *Page 14, 15, 16*

The Web Commerce application imports the Siebel Product catalog to provide the web channel with the tools to maximize performance and offer better control. The Product Catalog import comprises of Catalogs, Categories, Products, Bundles, Attributes, Product Classes, Pricelists and discounts.

4.2.1.8 Level 3: 1.2.1.5.8 - Manage Product Exit

Table 4.28 - Level 3: 1.2.1.5.8 - Manage Product Exit

LEVEL 3 PROCESS MAPPING DETAILS
1.2.1.5.8 - Manage Product Exit

Brief Description
Identify existing products which are unviable and manage the processes to exit the product from the market.

Covered within the body of the Extended Description.

Extended Description
The Manage Product Exit processes identify existing products which are unviable and manage the process to exit the product from the market.

The processes analyze existing products & sales offers to identify economically or strategically unviable products,identify customers impacted by any exit,

Comprehensive sales and service metrics, pre-integrated through ETL's from the Siebel CRM system, provide the necessary insight to assess the viability of products from both a sales and service (cost to serve) perspective.

OBIEE Metrics: (A/M)
- Sales Products: Page 272 to 274
- Svc Requests:Page 306 to 309

In additional to the Siebel pre-built analytics, the Oracle Communications Data Model (OCDM) offers a SID certified Intelligent Data Warehouse package that is tightly integrated with the business intelligence platform. With pre-built data mining, Oracle Online Analytical Processing (Oracle OLAP) and dimensional models, Oracle Communications Data Model provides you with industry-specific metrics and insights that you can use to perform detailed analysis around all aspects of product viability. Assets that would be particularly useful for analysing a products viability in OCDM include: Customer Acquisition Cube (p9-81), Revenue Cube (p9-110), Subscriber Churn Statistic Cube (p9-122), Product Management Sample Reports (p12-50).

OCDM: (A/M)
- OLAP Cubes: 9-1 to 9-143
- Sample Reports: 12-1 to 12- 98

These Business Intelligence tools allow end users to manually review and analyse the Business Intelligence data provided to assess the viability of products and services offeredand the potential impact on the subscriber base.

develop customer specific or market segment exit or migration strategies,

Siebel Marketing can be used to define and execute multi-wave marketing campaigns to target customers who will be impacted by the planned product exit. Typically the campaign will be manually configured by a Marketing Manager based on the Business Intelligence data (see above), to target the identified impacted customer segments with promotional offers to incentivise them to move to an alternative viable product.

Siebel Marketing User Guide: (A/M)
- Page – 15 to 18

develop infrastructure transition and/or replacement strategies, and manage the operational aspects of the exit process.

From a systems perspective a similar approach is taken when retiring products as to when introducing or launching new products. Once a given product or service has been determined as ready for retirement (through the Business Intelligence data provided, or otherwise), the Product Manager can manually specify an end-date for the product exit within the central Product Hub and mark the product(s) as inactive. Through the pre-integration provided to the downstream operational systems these status updates can be automatically published from the Product Hub. By applying these changes to products that have gone into retirement, they will automatically be masked from any commercial catalogue, ensuring the service can no longer be sold into the customer base.

P-MDM Integration Impl Guide: (A/M)

- Page 65 – 67

[Comms O2C Impl Guide]: (A/M)

- Page 31 – 35

A business proposal identifying the competitive threats, risks and costs may be required as part of developing the exit strategy. It includes any cross-enterprise co-ordination and management functions to ensure that the needs of all stakeholders are identified and managed.

See Note 1: This proposal could be an input, and/or further developed by management throughout the execution of this process.

4.2.1.9 Supporting Evidence References (Works Cited)

[RODOD Whitepaper]   Rapid Offer and Order Delivery – An Oracle White paper

[P-MDM Integration Impl Guide]   Oracle Product Master Data Management Integration – Implementation Guide 11.2

[*Comms O2C Impl Guide*]   Oracle Communications Order to Cash Integration Pack Implementation Guide for Siebel CRM, Oracle Order and Service Management, and Oracle Billing and Revenue Management 11.3

[Siebel Marketing User Guide]   Siebel Marketing User Guide

[*ATG Web Commerce Product Catalog Integration*] *ATG-Siebel Product Data Integration IG*

[OCDM]   Oracle Communications Data Model 11.2

[PLM Impl Guide]   Oracle Product Lifecycle Management Implementation Guide R12

[PLM User Guide]   Oracle Product Lifecycle Management User Guide R12

[PIM Impl Guide]   Oracle Product Information Management Implementation Guide R12

[PIM User Guide]   Oracle Product Information Management User Guide R12

[Project Management Guide]   Oracle Project Management User Guide R12.1

4.2.1.10 Level 2: 1.2.1.5 - Product & Offer Development & Retirement - Scores

Table 4.29 - Level 2: 1.2.1.5 - Product & Offer Development & Retirement - Scores

Level 2: 1.2.1.5 - Product & Offer Development & Retirement [6/8]		
Level 3 Process	**Level 4 Process**	**L4/L3 Process Score**
1.2.1.5.1 - Gather & Analyze New Product Ideas		0
1.2.1.5.2 - Assess Performance of Existing Products		**5**
1.2.1.5.3 - Develop New Product Business Proposal		0
1.2.1.5.4 - Develop Product Commercialization Strategy		**5**
	1.2.1.5.4.1 Develop Product Commercialization Case	100%
	1.2.1.5.4.2 Gain Product Commercialization Case Approval	100%
1.2.1.5.5 - Develop Detailed Product Specifications		**5**
	1.2.1.5.5.1 Develop Detailed Product Technical Specifications	100%
	1.2.1.5.5.2 Develop Detailed Product Performance Specifications	100%
	1.2.1.5.5.3 Develop Detailed Product Operational Specifications	100%
	1.2.1.5.5.4 Develop Detailed Product Customer Manuals	100%
1.2.1.5.6 - Manage Product Development		**5**
1.2.1.5.7 - Launch New Products		**5**
	1.2.1.5.7.1 Identify Product Issues	100%
	1.2.1.5.7.2 Manage Product Improvements	100%
	1.2.1.5.7.3 Manage Product Handover	100%
1.2.1.5.8 - Manage Product Exit		**5**
	1.2.1.5.8.1 Identify Unviable Products	100%
	1.2.1.5.8.2 Identify Impacted Product Customers	100%
	1.2.1.5.8.3 Develop Product Transition Strategies	100%
	1.2.1.5.8.4 Manage Product Exit Process	100%

4.3   Assessment Notes

Generic notes that have been referenced within the assessment document have been provided here:

Note 1: *This part of the eTOM process description does not represent a direct process requirement, however this text has been provided as further information to contextualise the overall support for the level 3 process in question.*

Note 2: *This part of the eTOM process description refers to another L3 process area so is not part of the scope of this specific L3 process. This text has been provided as further explanation regarding how this maps to the related L3 process area.*

Note 3*: This part of the eTOM process description refers to another eTOM process that is not covered by the scope of this certification.*

4.4 Documentation / Asset Inventory

The table below details all of the documentation provided as part of this certification and a URL of where the documentation can be downloaded from if it is available on the public internet.

Table 4.30 – Oracle RODOD Solution Documentation Asset Inventory

Documentation Description	Download location
RODOD Whitepaper	http://www.oracle.com/us/industries/communications/rapid-offer-design-order-wp-077276.pdf
Oracle Product Hub for Communications Whitepaper	No download available on the public internet. Available to customers & partners at: https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&doctype=WHITE PAPER&id=1086492.1
Oracle Product Information Management User Guide	http://docs.oracle.com/cd/B53825_07/current/acrobat/121pimug.zip
Oracle Product Information Management Implementation Guide	http://download.oracle.com/docs/cd/B53825_07/current/acrobat/121pimig.pdf
Oracle Product Lifecycle Management User Guide	http://download.oracle.com/docs/cd/B40089_10/current/acrobat/120plmug.pdf
Oracle Product Lifecycle Management Implementation Guide	http://download.oracle.com/docs/cd/B34956_01/current/acrobat/120plmig.pdf
Oracle Project Management User Guide	http://download.oracle.com/docs/cd/B53825_07/current/acrobat/121pjtug.pdf
Oracle Product Master Data Management Integration 11.2 Implementation Guide	http://docs.oracle.com/cd/E38316_01/doc.114/e38142.pdf
Oracle Communications Order to Cash Integration Pack Implementation Guide for Siebel CRM, Oracle Order and Service Management, and Oracle Billing and Revenue Management 11.3	http://docs.oracle.com/cd/E38316_01/doc.114/e37675.pdf
Siebel Pricing Administration Guide Version 8.1	http://download.oracle.com/docs/cd/E14004_01/books/PDF/PriceAdm.pdf
Siebel Product Administration Guide Version 8.1	http://download.oracle.com/docs/cd/E14004_01/books/PDF/ProdAdm.pdf
Siebel Order Management Guide Version 8.1	http://download.oracle.com/docs/cd/E14004_01/books/PDF/OrdMgt.pdf
Siebel Marketing User Guide Version 8.1	http://download.oracle.com/docs/cd/E14004_01/books/PDF/MKTG_User.pdf
OBIEE Metrics - Oracle Business Intelligence Applications 7.9.6 Metric Reference Guide	No download available
Oracle Communications Data Model	http://download.oracle.com/docs/cd/E16762_01/doc/doc.112/e15886.pdf
Siebel Communications Guide Version 8.1	http://download.oracle.com/docs/cd/E14004_01/books/PDF/CommSIA.pdf

Documentation Description	Download location
Siebel Order Management Guide for Communications	http://download.oracle.com/docs/cd/E14004_01/books/PDF/OrdMgtSIA.pdf
Siebel Applications Administration Guide Version 8.1	http://download.oracle.com/docs/cd/E14004_01/books/PDF/AppsAdmin.pdf
Oracle Real-Time Decisions for Siebel Intelligent Offer Generation Installation and Reference Guide	http://download.oracle.com/docs/cd/E12181_01/doc/rtd.221/e12185.pdf
Siebel CRM Integration Pack for Oracle Order Management- Order to Cash 2.5 - Implementation Guide	http://download.oracle.com/docs/cd/E20059_01/doc.250/e15769.pdf
Oracle Communications Order and Service Management Task Web Client User's Guide	http://docs.oracle.com/cd/E35413_01/doc.722/e35416.pdf
Oracle Communications Order and Service Management Concepts	http://docs.oracle.com/cd/E35413_01/doc.722/e35415.pdf
Oracle Communications Order and Service Management Reporting Interface Guide	http://docs.oracle.com/cd/E35413_01/doc.722/e35421.pdf
Siebel Assignment Manager Administration Guide Version 8.1	http://download.oracle.com/docs/cd/E14004_01/books/PDF/AssignMgrAdm.pdf
Siebel Field Service Guide Version 8.1	http://download.oracle.com/docs/cd/E14004_01/books/PDF/FieldServ.pdf
Partner Relationship Management Administration Guide Version 8.1	http://download.oracle.com/docs/cd/E14004_01/books/PDF/PRMAdm.pdf
Service Analytics Product Guide	No download available
Siebel Order Management Guide Addendum for Communications	http://docs.oracle.com/cd/E14004_01/books/PDF/OrdMgtSIA.pdf

5 Information Framework Assessment Overview

Not applicable for this Assessment.

6 Frameworx Conformance Result

This section details the Scores awarded to reflect Conformance of the Oracle RODOD Solution to the Business Process Framework & Information Framework components of Frameworx 12.

6.1 Business Process Framework – Scoring Rules

The conformance scores granted were based on the following TM Forum scoring rules:

Table 6.1 - TM Forum Business Process Framework: Conformance Scoring Rules

Frameworx 12.0 Conformance Certification (Product/Solution/Implementation)		
Business Process Framework (eTOM) - Conformance Level Descriptions (Level 3 processes)		
Process level	**Conformance Score**	**Qualifier**
Level 1	**Not applicable**	Conformance Assessment shall not be carried out at this process level - hence Confomance Level shall not be awarded at this level.
Level 2	**Not applicable**	A conformance level is not awarded to Level 2 processes in Frameworx 12.0 Assessments. The Certification Report shall highlight the coverage of a Level 2 process submitted in scope for an Assessment in terms of number of Level 3 processes submitted for assessment out of the total number defined for the Level 2 process.
Level 3	**Score is awarded between 3.1 & 5.**	The Conformance Score is awarded for each Level 3 processes submitted in scope for the Assessment. The Conformance Score awarded can be a value between 3.1 & 5 depending on the level of coverage & conformance to the Level 3 process based on the alignment to the level 3 Implied Tasks as decomposed in the Level 4 process definitions. *Any manual implementation of the process support shall be noted in the Conformance Report and Detailed Results Report.*

6.2   Business Process Framework - Conformance Result Summary

The graphs in this section provides an overview of the conformance levels granted to the Level 3 Processes presented in scope for the Oracle RODOD Solution Assessment. Each Level 3 process was measured using a Business Process Framework (eTOM) conformance score according to level of Conformance – Full Conformance or Partial Conformance as described in section 6.1 Business Process Framework – Scoring Rules.
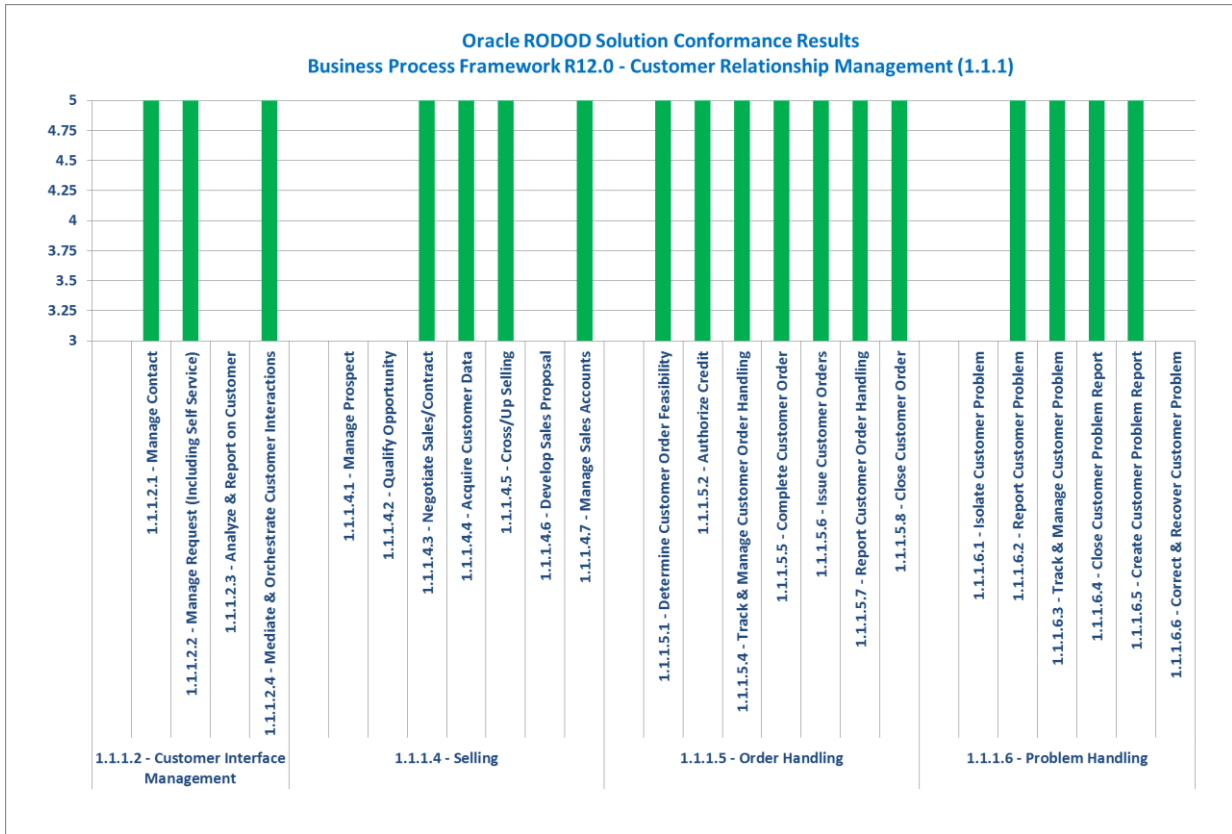

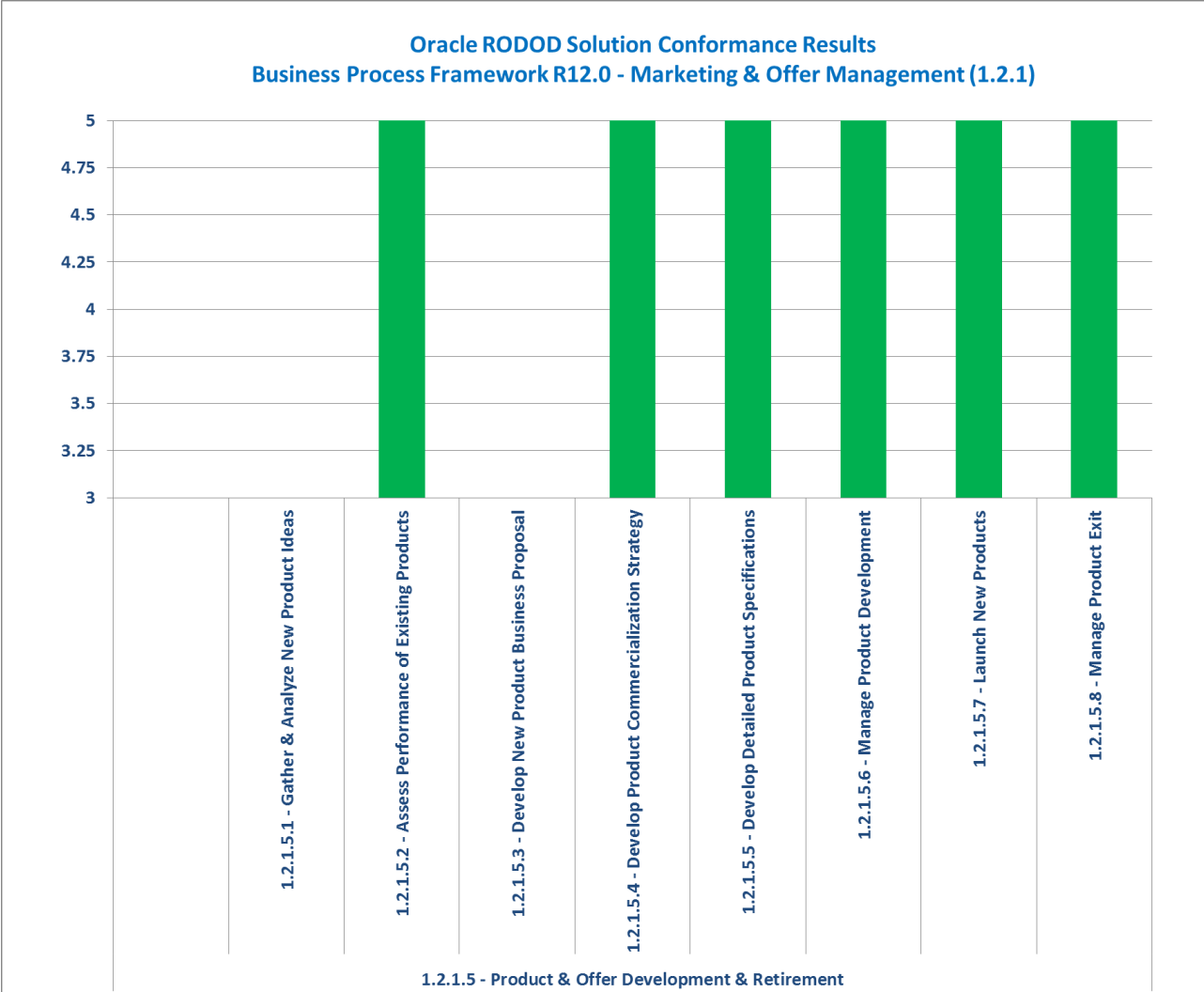**Figure 6.1 - Conformance Result Summary – Customer Relationship Management**

Figure 6.2 – Conformance Result Summary – Marketing & Offer Management

6.3   Business Process Framework – Conformance Results Detailed

The following table provides a more detailed breakdown of the scores awarded with some additional commentary.

Table 6.2 - Business Process Framework: Detailed Conformance Result

Oracle Rapid Order Design & Order Delivery (RODOD) Solution Business Process Framework (eTOM) Release 12.0 Conformance		
Business Process Framework Process	**Conformance Score**	**Comment**
Level 1: 1.1.1 - Customer Relationship Management	**N/A**	The following Level 2 process elements were submitted in scope for this Level 1 process: 1.1.1.2 - Customer Interface Management 1.1.1.4 - Selling 1.1.1.5 - Order Handling 1.1.1.6 - Problem Handling
Level 2: 1.1.1.2 - Customer Interface Management	**Scope [3/4]**	The following Level 3 processes were assessed for conformance: 1.1.1.2.1 - Manage Contact 1.1.1.2.2 - Manage Request (Including Self Service) 1.1.1.2.4 - Mediate & Orchestrate Customer Interactions These processes represent 3 of 4 Level 3 processes defined within the **1.1.1.2 - Customer Interface Management** process.
Level 3: 1.1.1.2.1 - Manage Contact	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.1.1.2.2 - Manage Request (Including Self Service)	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).

Level 3: 1.1.1.2.3 - Analyze & Report on Customer	*0*	*Not submitted for Assessment.*
Level 3: 1.1.1.2.4 - Mediate & Orchestrate Customer Interactions	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 2: 1.1.1.4 - Selling	**Scope [4/7]**	The following Level 3 processes were assessed for conformance: 1.1.1.4.3 - Negotiate Sales/Contract 1.1.1.4.4 - Acquire Customer Data 1.1.1.4.5 - Cross/Up Selling 1.1.1.4.6 - Develop Sales Proposal 1.1.1.4.7 - Manage Sales Accounts These processes represent 4 of 7 processes defined within the **1.1.1.4 – Selling** Level 2 process..
Level 3: 1.1.1.4.1 - Manage Prospect	*0*	*Not submitted for Assessment.*
Level 3: 1.1.1.4.2 - Qualify Opportunity	*0*	*Not submitted for Assessment.*
Level 3: 1.1.1.4.3 - Negotiate Sales/Contract	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).

Level 3: 1.1.1.4.4 - Acquire Customer Data	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.1.1.4.5 - Cross/Up Selling	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.1.1.4.6 - Develop Sales Proposal	*0*	*Not submitted for Assessment.*
Level 3: 1.1.1.4.7 - Manage Sales Accounts	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 2: 1.1.1.5 - Order Handling	**Scope [7/7]**	The following Level 3 processes were assessed for conformance: 1.1.1.5.1 - Determine Customer Order Feasibility 1.1.1.5.2 - Authorize Credit 1.1.1.5.4 - Track & Manage Customer Order Handling 1.1.1.5.5 - Complete Customer Order 1.1.1.5.6 - Issue Customer Orders 1.1.1.5.7 - Report Customer Order Handling 1.1.1.5.8 - Close Customer Order These processes represent the full level 3 process scope (7/7) defined within the **1.1.1.5 - Order Handling** process.

Level 3: 1.1.1.5.1 - Determine Customer Order Feasibility	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.1.1.5.2 - Authorize Credit	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.1.1.5.4 - Track & Manage Customer Order Handling	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.1.1.5.5 - Complete Customer Order	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.1.1.5.6 - Issue Customer Orders	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).

Level 3: 1.1.1.5.7 - Report Customer Order Handling	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.1.1.5.8 - Close Customer Order	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 2: 1.1.1.6 - Problem Handling	**Scope [4/6]**	The following Level 3 processes were assessed for conformance: 1.1.1.6.2 - Report Customer Problem 1.1.1.6.3 - Track & Manage Customer Problem 1.1.1.6.4 - Close Customer Problem Report 1.1.1.6.5 - Create Customer Problem Report These processes represent 4 of 6 Level 3 processes defined within the **1.1.1.6 - Problem Handling** process.
Level 3: 1.1.1.6.1 - Isolate Customer Problem	*0*	*Not submitted for Assessment*
Level 3: 1.1.1.6.2 - Report Customer Problem	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).

Level 3: 1.1.1.6.3 - Track & Manage Customer Problem	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.1.1.6.4 - Close Customer Problem Report	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.1.1.6.5 - Create Customer Problem Report	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.1.1.6.6 - Correct & Recover Customer Problem	*0*	*Not submitted for Assessment*
Level 1: 1.2.1 - Marketing & Offer Management	**N/A**	**The following Level 2 process elements were submitted in scope for this Level 1 process:** **1.2.1.5 - Product & Offer Development & Retirement**
Level 2: 1.2.1.5 - Product & Offer Development & Retirement	**Scope [6/8]**	The following Level 3 processes were assessed for conformance: 1.2.1.5.2 - Assess Performance of Existing Products 1.2.1.5.4 - Develop Product Commercialization Strategy 1.2.1.5.5 - Develop Detailed Product Specifications 1.2.1.5.6 - Manage Product Development

		1.2.1.5.7 - Launch New Products 1.2.1.5.8 - Manage Product Exit These processes represent 6 of 8 Level 3 processes defined within the **1.2.1.5 - Product & Offer Development & Retirement** process.
Level 3: 1.2.1.5.1 - Gather & Analyze New Product Ideas	*0*	*Not submitted for Assessment.*
Level 3: 1.2.1.5.2 - Assess Performance of Existing Products	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.2.1.5.3 - Develop New Product Business Proposal	*0*	*Not submitted for Assessment.*
Level 3: 1.2.1.5.4 - Develop Product Commercialization Strategy	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.2.1.5.5 - Develop Detailed Product Specifications	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.2.1.5.6 - Manage Product Development	**5**	**Fully Conformant** Supporting evidence and

		documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.2.1.5.7 - Launch New Products	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
Level 3: 1.2.1.5.8 - Manage Product Exit	**5**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).

6.4   Information Framework – Scoring Rules

Not applicable for this assessment.

6.5 Information Framework – Conformance Result Summary

Not applicable for this assessment.

6.5 Information Framework – Conformance Result Summary

6.6   Information Framework – Conformance Result Detailed

Not applicable for this assessment.