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Oracle Siebel CRM Statement of Direction

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Purpose statement

This document provides an overview of features and enhancements that are planned for delivery in upcoming monthly Oracle Siebel CRM Release Updates. It is intended solely to help you assess the business benefits and planning for the implementation of the product features described.

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Executive Summary

Market Trends

Oracle views Customer Experience (CX) as an enterprise-wide strategy powered by end-to-end flows and processes that connect the entire business. The question is no longer about gathering enough data to power these flows, but about ensuring that the data is usable and liberated from company silos to create new streams of value, while simultaneously safeguarding it on behalf of customers. Artificial Intelligence (AI) is a fundamental lever to unlock the power of data at scale, and embedding AI in customer and employee experiences will create better outcomes for customers and the businesses that serve them.

As ever before, customer expectations continue to evolve and force businesses into new uncharted territory. Generative AI (GenAI) opens entirely new possibilities for truly conversational and personalized digital experiences throughout the customer journey. Machines now have sophisticated abilities to: write text free of bias; create fiction with an understanding of the human condition; generate visual art from text; suggest code changes; and speak in all the world's languages with native fluency.

Organizations that embrace AI strategically will accelerate growth, solve complex challenges, and create exceptional customer experiences. However, we also see that successfully harnessing the promise of AI is heavily dependent on good data and infrastructure, which need to comply with regional laws and regulations as well as be cost-effective.

These market trends—balancing the adoption of disruptive technology with the current economic challenges organizations face—play a key role in our strategy for Siebel CRM.
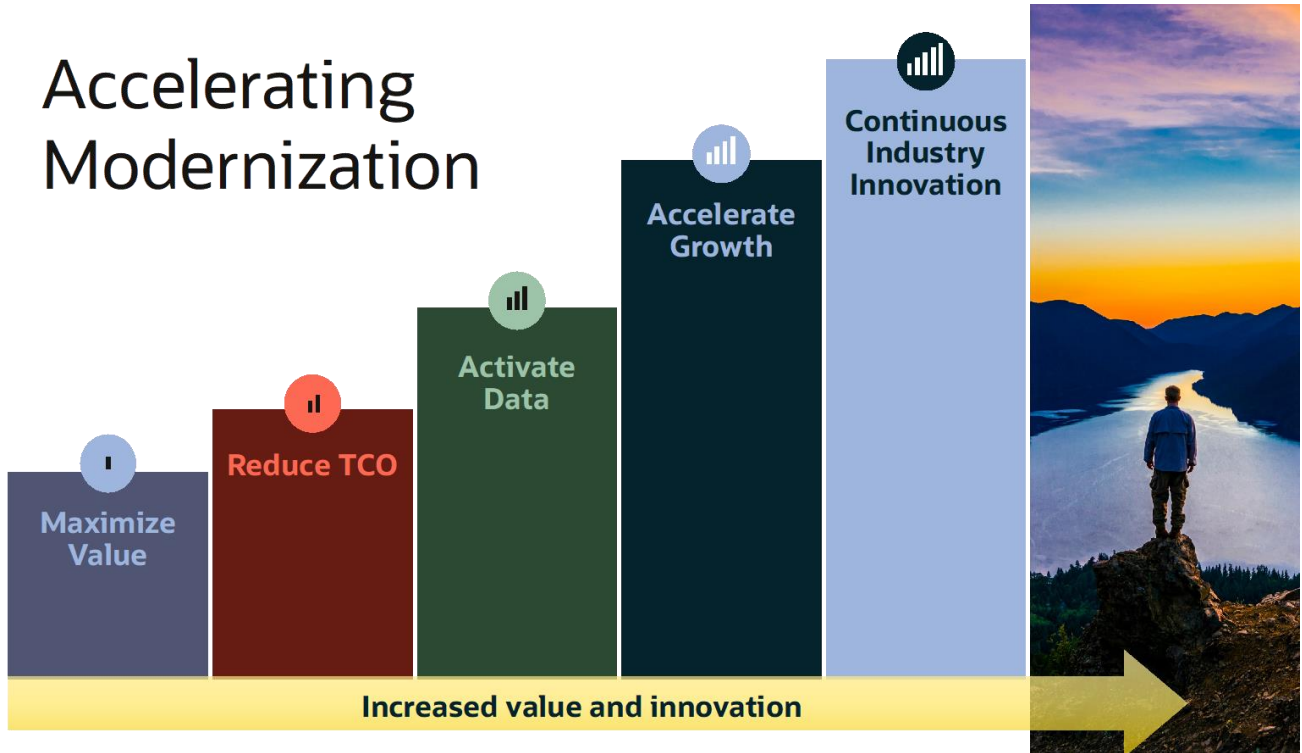
Strategy

Over the past 30 years, Siebel CRM has evolved to meet the needs of new channels and consumer behaviors, and our mission is to ensure it continues to play a pivotal role in linking the front and back office across all industries.

Our approach towards continuous modernization recognizes the need for our customers to maximize the value of their existing enterprise-scale, configurable implementations while improving Siebel CRM by adopting modern best practices around microservices, application programming interfaces (APIs), user experience (UX), manageability, and so on. Oracle's superior technology stack provides perfect leverage to achieve this. With its powerful, intelligent, cloud native database, PaaS, and SaaS capabilities, we can rapidly evolve the Siebel CRM platform functionally and technically—without causing any disruption.

As illustrated in the figure below, modernization can be accelerated through a series of steps, which increase the value and drive innovation from your Siebel CRM application platform. This approach enables customers to maximize the value from their investment while realizing the benefits of modern architecture, integration, UX, and beyond.

Customers that have already embraced cloud technologies by deploying Siebel CRM on Oracle Cloud Infrastructure (OCI) have simultaneously reduced their total cost of ownership (TCO) dramatically while achieving performance improvements of over 50%. This architectural shift has an impact even beyond operational, cost, and performance gains, though; Siebel CRM on OCI serves as a catalyst for cost-efficient, accelerated innovation across the platform.

Figure 1. Accelerating modernization with Siebel CRM

One crucial strategic gain accelerated and empowered through the combination of Siebel CRM on OCI is the transformation of your "system of record" into a "system of intelligence" by activating your data. In most cases, CRM data collected over decades is a vital strategic asset, and it is crucial to leverage that data in your organizational AI initiatives while continuing to protect and secure it. A widely used phrase, *"effective AI is only as good as your data,"* is especially true in this context. Some key considerations we are hearing from Siebel CRM customers:

- **Data is your differentiator** and therefore existing historical customer data, often integrated across multiple systems, provides perfect leverage for cost-optimized AI. Combining your business data with AI becomes a powerful asset for data-driven decision-making, leading to better informed decisions based on trends, customer behavior, and market insights.

- **Streamlining processes** by integrating AI into existing CRM processes to automate routine tasks frees up human resources and leads to increased efficiency and productivity.

- **Agility** and adaptation to digital channels, data privacy regulations, and constantly changing consumer behaviors pose obstacles, yet organizations with a robust CRM platform can pivot quickly. Adding AI capabilities to Siebel CRM provides simplicity to an existing reliable tech stack rather than adding complexity with additional solutions from multiple vendors.

- **Scalability and performance** delivered with the OCI platform provides high performance and flexibility for AI model training and inference.

- **Data sovereignty and control** with Oracle's distributed cloud strategy enables organizations to choose where data resides. Sensitive data can stay on-premises, ensuring compliance with regional laws.

Figure 2. Industry excellence – everything you need delivered across the full Oracle stack.
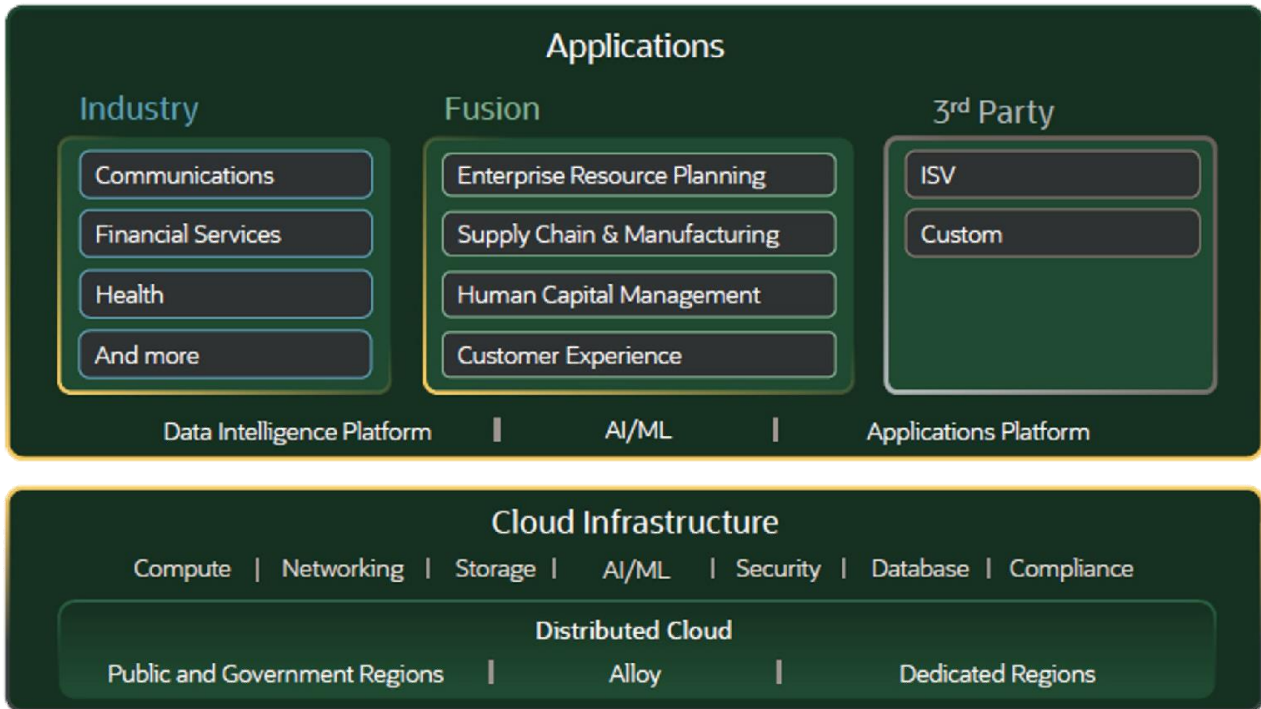
Accelerating growth across CX for all industries is not solely a front-office requirement, but a need to provide a connected experience from front to back office. Applications, assets, people, and policies managed in back-office systems must be interconnected so that data and experiences can be integrated across the organization.

For example, there is not much point in having a great real-time digital commerce experience if you cannot see the inventory at a store near you at that moment or cannot schedule delivery reliably and instantly. Failure to recognize this often leads to application and data silos, operational inefficiencies, and increased costs as you piece together the puzzle and work with multiple technology vendors.

Our goal is to ensure Siebel CRM's core platform capabilities, with over 30 years of industry solution expertise and engineering, provide synergy with industry solutions. Through composability, industry solutions offer more adaptability than today's SaaS applications; more business functionality than today's IaaS/PaaS clouds; and more innovation than today's single-industry solutions. Customers with Siebel CRM as their mission-critical customer application are in a unique position to take advantage of AI within their industry, without looking at costly replacements or custom-built solutions.

A recently published IDC spotlight paper outlines the benefits for organizations who can transform their existing CRM implementations without costly, high-risk, or complex migrations to other solutions.

Reflecting our strategic approach, the roadmap for Siebel CRM is split into two themes: **Business & Applications** and **Platform & Operations**.

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Innovation Themes

Siebel CRM innovation follows core themes that provide value and return on investment (ROI) for both business and IT.

Business & Applications

User experience (UX) – The Siebel CRM Open UI framework provides the flexibility to design and deploy the application to be specific to your business and customer needs. Open UI provides the ability to deliver customized employee-facing applications and secure customer portals. We are continuously looking to enhance the out-of-the-box UX, while providing our customers with the ability to use other modern frameworks to develop their own custom-built UX on top of Siebel CRM. This includes "no-code" and "low-code" options that can be achieved using GenAI and Oracle UX technologies.

Mobile – Siebel Mobile enables your application to be used on any mobile device and to be accessible from anywhere, with or without connectivity. Our strategy is to ensure mobile applications can be built quickly from the existing Siebel CRM configuration and deployed at low cost.

Artificial intelligence (AI) - Enabling Siebel CRM data and processes to leverage modern technologies, such as AI and machine learning, is a crucial part of our AI-enabled CRM vision. Applications, such as Digital Assistants that can interact with Siebel CRM using AI capabilities, provide new interactive experiences and business insights. Adding support for the Oracle 23ai Autonomous Database and Advanced Analytics will additionally enable use of machine learning functionality across the entire Siebel CRM platform. With GenAI, it's also now possible to enable more automation features for a variety of business use cases.

Customer 360 – Achieving a successful CRM implementation and a complete customer 360 view requires a master data management (MDM) solution at the heart of any enterprise. Siebel Universal Customer Master (Siebel UCM) is designed to store a clean and unified profile for all customer data. UCM is a comprehensive repository that enables centralized data cleansing and deduplication. As part of our data and AI strategy, we also focus on improving access to customer data at extreme scale and enriching first-party data with intelligence from CX Unity, a customer data platform, which can be used to enhance a variety of CX use cases.

CX applications – To support an omnichannel customer experience and front- to back-office business orchestration, it is our goal to make connecting CX applications to Siebel CRM and back-office integrated systems as seamless as possible. Existing pre-integrated solutions to the CX suite include:

- Sales & Service: Oracle Intelligent Advisor (OIA), Oracle Field Service (OFS)
- Marketing & Loyalty: Unity, CrowdTwist
- Industry: Launch, Order and Service Management (OSM), Billing and Revenue Management (BRM)

Advanced industry solutions – Siebel CRM has complete industry applications consisting of business processes, workflows, and schema designed from the ground up, based on industry best practices. Siebel CRM's rich industry solutions continue to be extended to leverage Oracle's best-of-breed cloud services to provide advanced industry solutions.

Platform & Operations

Modern architecture – Our goal is to provide the ability to operate Siebel CRM as a modern standalone application or as part of wider industry cloud solutions with the same architecture and operational efficiencies at extreme scale. We are continually evolving our application architecture to be more open and optimized for cloud interoperability, aligning where appropriate to cloud native and Microservices, API-first, Cloud native, and Headless (MACH) architecture principles:

- **Microservices-foundation**: individual aspects of business functionality that can be independently developed, deployed, and managed.
- **API-enabled**: expands access to more business services and functionality through APIs, making it possible to tie together applications and services seamlessly.

- **Cloud-optimized**: aligning to the key principles of cloud native architectures where appropriate, embracing the full capabilities of fleet management, beyond storage and hosting, including elastic scaling of highly available resources. Application functionality is updated with minimal disruption, eliminating the need for upgrade management.

- **Headless-capable**: the user interface is completely decoupled from business logic, allowing for complete design freedom in creating the user interface and for interoperating with other channels and devices, such as applications, robotic processing, IoT, Augmented Reality, Digital Assistants, sensors, and so on.

Multi-cloud operations – our goal is to simplify cloud adoption for Siebel CRM by providing deployment choices and tooling to manage Siebel CRM in the cloud while embracing cloud native platform technologies:

- Siebel CRM can be hosted on-premises and in public, private, or partner clouds for employee, partner, or customer-facing applications orchestrated by Kubernetes distributions that adhere to Cloud Native Computing Foundation (CNCF) Kubernetes standards. This provides customers with the choice of deployment preferences, advancement in their journey of cloud native maturity, and protection of their most important asset: customer data.

- Hosting Siebel CRM on cloud infrastructure can dramatically reduce TCO. Customers have realized 35% lower TCO than on-premises hardware with OCI. Without hardware costs, organizations shift from capital expenditure to an operating expenditure platform model.

- OCI provides improved performance and dynamic elasticity to scale on demand.

- Oracle's multi-cloud strategy has come to fruition through the partnerships of OCI with Microsoft Azure, Google Cloud Platform, and Amazon Web Services, providing more choices for customers as they develop or evolve their cloud deployment architectures.

- Siebel CRM on-premises or hosted deployments can integrate with Oracle cloud applications via existing integration accelerators and standard interfaces provided with the Oracle Integration Cloud Service.

- Siebel Cloud Manager (SCM), an automation application to simplify "lift and shift", helps customers to easily migrate their Siebel CRM setup to Oracle Cloud Infrastructure (OCI) while keeping all customizations. It includes enhanced SiebelOps features with GitOps controls and offers a cloud native observability stack for monitoring and analytics.

- SCM offers the choice of leveraging Kubernetes distributions, such as OCNE, OKE, or any other CNCF standards-compliant distribution, for your cloud or on-premises Siebel CRM deployment in your data center (including but not limited to Oracle Compute Cloud@Customer and Private Cloud Appliances offerings from Oracle).

Agility & DevOps – The Siebel CRM application is now easier than ever to maintain and update. Our continued focus on agility enables enterprises to adapt to business challenges quicker than ever. Our goal is to continue to reduce downtime by providing the capability to make all manner of updates to the application in real time.

Integration – Providing an open integration approach enables the Siebel CRM platform to embrace entirely new business models and technologies across industry cloud solutions. As industry CX becomes increasingly data driven and customer-centric, APIs allow for greater versatility, innovation, and openness.

Developers – Siebel CRM now provides a modern developer experience to configure, manage, and deploy the application, at the same time enabling parallel, collaborative, and distributed team development. It is coupled with a built-in, simple-to-use test automation suite that provides automated, lights out testing, saving time and money. A key part of our roadmap is to improve developer experience and productivity by enhancing our Web Tools integrated development environment (IDE) and embracing new open-source technologies.

Automation – One of the key components of any DevOps cycle is to adequately test the application to ensure any defects or abnormal behavior are identified and rectified before release. Whether it's making internal updates to your Siebel CRM deployment, or applying a Monthly Update, the ability to automate functional and regression testing can see a dramatic improvement in quality and reduction in TCO.

Business & Applications

The following innovations help to improve customer experience and drive revenue growth.

Usability & Productivity

User Experience

Our open approach to UX enables our customers to choose the direction of UX that best meets their organizational strategy. We provide an intuitive out-of-the-box UI, a framework for customers to create their own customized UX across mobile devices, and the ability to operate Siebel CRM in "headless" mode.

Redwood UX

Following the well-received Redwood UX for Siebel CRM introduced in our 24.6 release, we continue to enhance the application user experience.

Key improvements planned for delivery include:

- **Redwood UX-based partner portal** – The partner portal will offer a modern experience that is intuitive and user-friendly, ensuring even naive users can navigate it with ease. Changing our user interface to Redwood will bring the intuitive nature of Siebel employee-facing applications into the partner relationship management portals.

- **Restyled tablet and mobile interface** – Siebel tablet and mobile applications will offer a restyled user interface in line with the desktop application, enabling a seamless user experience across desktop, laptop, tablet, and mobile devices. However, as these applications are used differently, the user interface restyling is based on key considerations, including streamlining information to ensure a lighter application and tools to help mobile users find relevant information easily with minimal user interaction.

For more information, refer to Redwood user experience.

Process-Driven Guided UX

Using the Redwood UX as the basis, we will deliver a more intuitive, modernized way to guide your users through their tasks whether they are in the Siebel UI or in an external application that embeds the Siebel CRM guided flow (Task Based User Interface).

Key features planned for delivery include:

- Clarity on which steps have been visited by a user.

- Ease of navigation through different steps of the flow so that jumping back or forward in the flow is intuitive.

- Clarity on the number of steps to complete a task and the user's location in the overall process.

Open UI

Open UI allows customers to create a customized UX for their Siebel CRM application.

Key features to improve usability include:

- Improved UI responsiveness via simultaneous loading of components within a single view.

- UI parallel applet loading:

  - Parallel loading of disparate applets in a view (dashboard).

  - Parallel loading of parent/child applets in a view without dependency.

  - Lazy loading of applets for users to view information quickly.

- Improved UX for the editing of hierarchies, including those that involve multiple object styles across functional areas.

- Support for multi-hierarchy control (for example, depicting households, contacts, and entities associated with the contact in a multi-hierarchy editing UI) showing vertical and horizontal scroll bars.

- Support for Open UI rendering enhancements using third-party rendering frameworks, such as Oracle Jet, VUE, React, and Angular.

File Attachments

We will introduce a feature for the users to preview the file formats of the files attached to an email or an entity (such as contact, account, and service request) without having to download them to a local folder. Additionally, the users will have the flexibility to download multiple attachment files simultaneously with a single click.

Siebel Search

OpenSearch takes a proven community-driven, open source search solution and builds a management layer onto it. Key features planned for delivery include:

- Integrated adapter enabling modern Siebel Search UX with OpenSearch for improved productivity and usability.

- Intelligent Search powered by GenAI & Retrieval-augmented generation (RAG) for more accurate and relevant results.

- Flexible plug and play framework for seamless integration with third-party search engines.

Siebel Search User Experience

A streamlined and optimized search user experience is critical to business users to quickly access the most relevant data. A well-designed search UX enhances productivity, increases customer satisfaction, and adds greater business value.

Key features planned for delivery include:

- Unified Global Search bar offers full-text and semantic search across various data sources.

- Structured search results for easy access and detailed exploration.

- Smart filters to locate records according to specific criteria.

Siebel Mobile

We will enhance the Siebel Mobile framework to provide a more consistent UX whether working offline or online and to provide administrators with more tools for device problem diagnosis.

Key features planned for delivery include:

- **Seamless synchronization** – Enhance Siebel Mobile application to perform intelligent, automatic synchronization of data so that users always have the latest data on their mobile devices in offline mode without manual intervention.

- **Logging enhancement** – Enhance Siebel Mobile application with a new logging mechanism to capture client and server logs on the device, which can be shared with the system administrator if necessary to analyze any device-specific issues and support enterprise users across the globe.

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Data Activation

Artificial Intelligence

Leveraging Oracle's extensive and cutting-edge AI solutions across the stack, Siebel CRM can enable intuitive and intelligent experiences. The Siebel AI integration framework enables easy integration with OCI AI Services to power a variety of AI-enabled use cases within Siebel CRM. Siebel customers will also gain access to embedded AI features, including the support for the Oracle 23ai database (platform: Oracle 23ai Database).

Oracle Digital Assistant

To help reduce call volume and operational cost, Siebel CRM can be easily integrated with Oracle Digital Assistant. AI-powered conversational interfaces are becoming mainstream staples for consumers and enterprises alike. Oracle Digital Assistant delivers a complete AI platform to create conversational experiences for business applications through text, chat, and voice interfaces.

The Siebel CRM and Oracle Digital Assistant (ODA) integration will be further enhanced to provide details on how to achieve an "Agent transfer" by seamlessly transitioning a customer from "chatting with machine" to "chatting with a human agent". This will enable customers to provide more personal and engaging digital assistant experiences. To learn more, refer to Oracle Digital Assistant.

OCI AI Services

AI services are a collection of offerings, including GENA, with prebuilt machine learning models that make it easier for developers to apply AI to applications and business operations. The models can be trained for more accurate business results. The services let developers easily add machine learning capability to applications with minimal effort.

Key pretrained OCI AI service capabilities planned for delivery include:

- Translate inputs from email conversations and support requests in the thirty languages supported by the OCI Language service.

- Multilingual speech-to-text model support including the OpenAI's Whisper model, which provides 57 supported languages out of the box.

OCI Generative AI Service

The core capabilities of GenAI are writing assistance, summarization, analysis, and chat. They can help elevate an application user's efficiency and productivity as part of their day-to-day tasks. We have added a collection of out-of-the box functional use cases that leverage the Siebel AI Framework within both user-driven and automated task flows. The expected benefit is to improve productivity, accuracy, and customer experience.

Key GenAI capabilities planned for delivery include:

- SR similarity search lets you troubleshoot issues accurately and efficiently, by finding similar SRs that may have been previously resolved. SR similarity search uses RAG capabilities for similarity computation.

- Enable Assisted Authoring for call center agents to author curated responses quickly and easily.

- Enable call center agents to automatically generate a knowledge base article from the service request they have just resolved.

- Generate a service request response based on recommended knowledge base article or search results.

For more information, refer to OCI Generative AI Service.

Oracle 23ai Database

In addition to the inbuilt AI/ML models that already exist in the Oracle 19c database, the Oracle 23ai database introduces new AI features that offers tremendous advantages and leverage for Siebel CRM customers.

Organizations are starting to understand how to utilize vector databases to add context to generic large learning models (LLMs) or to enable rapid semantic search of the unstructured data. Adoption of a vector database will

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typically need to be integrated into your existing application architecture. This includes figuring out scalability, adding security and identity management, and meeting availability and performance expectations.

All-purpose databases like Oracle Database 23ai avoid these issues. Siebel CRM certification of the Oracle 23ai database means that customers running on the Oracle database are in a unique position. Not only does Oracle Database 23ai handle many data types, including vectors, but it's intertwined with your Siebel CRM application environment and already contains your organizations valuable customer and business data. There is no need to move data into a specialized vector database. Your team can focus its efforts on augmenting an LLM with company data.

Oracle describes this kind of highly integrated model as "converged database", a database with native support for all modern data types, analytics, and the latest development paradigms. Another new capability is "AI Vector Search," which includes vectors as a native data type, as well as vector indexes and vector search SQL operators. These together make it possible to store the semantic content of unstructured data as vectors. Users can then run split-second similarity queries on documents, images, and any other unstructured data represented as vectors. Searches on a combination of business and semantic data are easier, faster, and more precise if both types of data are managed by a single database.

Combining the power of Oracle 23ai and the Autonomous Database (Siebel CRM already supports 19c version) can deliver even more value – "Select AI" is an LLM-based natural language interface to the database. Database tools such as APEX and SQL Developer, also offer GenAI capabilities, currently in limited availability, that let developers use natural language to generate applications or SQL queries.

For more information, refer to Oracle 23ai database.

Master Data Management

Siebel CRM provides comprehensive Master Data Management (MDM) capabilities to meet a variety of organizational requirements depending on functionality, architecture, and scale.

Siebel Universal Customer Master

The primary MDM solution for Siebel CRM will be enhanced with the following features:

- Expose Siebel Universal Customer Master (UCM) via inbound REST APIs.

- Support the Kafka-based event-driven architecture.

- Enhance the integration with Oracle Enterprise Data Quality (EDQ) to retrieve the rule names for matching records.

- Allow publishing to multiple middleware systems in the hybrid mode (In this architecture, the endpoints can be either a middleware system or a specific edge system).

Party Management

Party Management helps organizations to consolidate and provide fast access to unified, cleansed customer data across the enterprise at scale and in a highly performant manner. A classic business requirement for Party Management would be to provide real-time access to consolidated customer data (across multiple customer systems) to initiate transactions, such as payment gateway for requesting customer information before processing or for access to key customer data for immediate cross-sell opportunities perhaps while a customer is talking to a sales assistant in a store.

While UCM offers a comprehensive MDM solution and is a proven product with a large customer install base, Party Management adds real-time access to key customer data at high performance.

Party Management integrates with MDM platforms (for example, UCM) to leverage capabilities, such as deduplication, cleansing, and survivorship rules, and thereby provide consistent, real-time customer information across the enterprise to enable personalized and consistent services.

It is built on the modern Helidon-based microservices architecture, which is highly performant, scalable, and resilient. It also has a business rule-driven caching mechanism wherein organizations can define the data that needs to reside in the cache to deliver high performance at extreme scale.

Analytics

Siebel CRM continues to be a core system for customer data, traditionally with massive transactional data volumes. Our investment is focused on deriving value from this data through various initiatives. Customers can migrate from Oracle Business Intelligence Enterprise Edition (OBIEE) to Oracle Analytics Server (OAS) today.

We are planning to provide an out-of-the-box integration with Oracle Analytics Cloud (OAC) for our cloud customers. At present, a technical brief is available for customers who want to migrate their existing OBIEE solution to OAC and our Oracle Consulting Services team has a cost-effective accelerator service.

OAC is a scalable and secure public cloud service that provides a full set of capabilities to explore and perform collaborative analytics for your enterprise. Simple yet powerful, OAC makes it easy for the users to capitalize on cloud analytics, today and in the future.

Integrating OAC with Siebel CRM will introduce the following capabilities:

- Analytics (including self-service analytics)
- Augmented analytics with machine learning
- Business scenario modeling and visual analyses
- Enterprise reporting

For more information refer to Oracle Analytics Cloud.

Here's an overview of the various analytical platforms, including the migration path.

Table 1. An overview of the analytical platforms, OBIEE, OAC, and OAS, and their migration path

	OBIEE	OAS	OAC
Integration with Siebel CRM	Yes (Certified)	Yes (Certified)	Not Certified (Roadmap)
Key features supported	Reporting Analytics with Segmentation	Pixel Perfect Reports Self Service Analytics Other Features & OBIEE Comparison	Governed Analytics (Dashboards & Reports) Self Service Analytics Augmented Analytics
Cloud / On-Premises Solution	On-Premises	On-Premises	PaaS/SaaS
Release Versions & Support Dates	OBIEE Versions and Support Dates	Oracle Lifetime Support Policy for Oracle Fusion Middleware Guide	OAC Product Updates
Proposed Migration Path	Migrate to latest OAS/OAC	Upgrade to latest OAS version Migrate to OAC	N/A

For latest versions supported with Siebel CRM, refer to the certification matrix on My Oracle Support.

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Customer Experience

Customer Order Management

Key enhancements planned for delivery in Siebel Customer Order Management include:

- Incorporate microservices for self-service channels to better enable web-scale performance.

- Concurrent processing of sub processes.

- Caching of bundle promotions in the file system.

- Purge old versions of products, classes, and attributes.

- Provide bulk request APIs.

- Support auto-complete/type-ahead within the Product Configurator UI.

- Rapid Offer Design and Order Delivery (RODOD) evolution; for information, refer to Communications - Digital Business Experience.

Loyalty

Oracle's Siebel Loyalty solution is a market-leading loyalty platform that provides an enterprise grade, highly scalable, and performant loyalty solution for a variety of industries and use cases. The Siebel Loyalty application is feature rich and supports multiprogram, multibrand, and multipartner loyalty solution that can be deployed on-premises or on cloud infrastructure. Siebel Loyalty can be deployed independently or enhanced further with Oracle CrowdTwist:

- **Siebel Loyalty standalone** (transactional loyalty requirements only) that can be deployed as:

  - Siebel Loyalty On-Premises

  - Siebel Loyalty on OCI

  - Siebel Loyalty on OCI and managed services provided by Oracle CSS or an Oracle partner

- **Siebel Loyalty with CrowdTwist** (to meet additional engagement loyalty requirements) for Hospitality and Food & Beverages industry–this solution is hosted and managed by Oracle.

Event-Based Reward Triggers for Loyalty Members

A good loyalty program recognizes events in their members' lives and journey with the brand by rewarding members at specific milestones. Siebel Loyalty now facilitates the automatic creation of transactions for the members who meet certain triggers, such as birthday, anniversary, referral complete, and specific redemption. These transactions are then processed to reward members.

This new functionality allows loyalty administrators and program managers to enhance their loyalty programs with the ability to create and process transactions for members non activity and to reward members on special occasions.

Member Referral

Referral communication is the most influential way of acquiring new members in a loyalty program. With this feature, loyalty members will be able to generate referral links, which can be shared with friends and family across social networks. Upon clicking the referral links, new contacts will get enrolled into the loyalty program and a referral bonus will get assigned to the referral member.

Point Expiry Notification

Loyalty points are the currencies in the loyalty program. It is desirable to inform the member of any upcoming point expiration. This feature will give a heads-up to the loyalty member on any point expiration that is going to occur soon.

Loyalty Promotions

Promotions-related enhancements include:

- **Promotion frequency cap** – This feature will give an option to cap rewarding of repetitive member activities to a certain predefined limit per period. This will ensure that a specific promotion is not misused by a loyalty member. For example, a member will be rewarded for a particular product purchase up to a maximum of two times per week.

- **Promotion effectiveness** – This feature will give a high-level glance of the promotion effectiveness and its pertinency inside the loyalty program. A promotion's effectiveness will be determined based on the total number of times the promotion is applied to members, total points rewarded through the promotion, and the rule of the promotion that gets applied. This feature will allow the program administrator to review a list of promotions and take corrective measures if a rule is not met or most of the time met by the transactions.

- **Promotion migration** – Customers follow a practice of configuring or designing promotions in a lower instance and then migrate it to higher instance once it's tested. This feature will make the promotion migration flow simpler for loyalty administrators. With just a click of the buttons, the promotion definition will be exported from a lower instance (source) and then imported to the higher (target) instance.

Loyalty Integration

Integration-related enhancements include:

- **Member merge REST API –** The member merge feature on the UI merges and consolidates the members' membership numbers with all the other member details to the surviving member. The same functionality will be made available through the Member Merge REST API.

- **Member association/disassociation REST API –** This REST API will allow association or disassociation of an individual member from a household or a corporate account.

Appointment Booking APIs for Siebel Scheduler

This feature enables customers to leverage Siebel Scheduler for providing an appointment booking solution on any customer or employee-facing channel. To meet the needs of the modern customer experience, it's required to allow customers to book appointments anytime, anywhere. To support this, scheduling APIs will be exposed. These APIs will enable self-service capability by integrating front-end applications with Siebel Scheduler.

As part of this feature, APIs will enable the following functionalities:

- Find a list of resources in a service region

- Check available timeslots and resource names for an activity

- Book an appointment

- Cancel an appointment

- Support prebuilt user experiences for industries

Knowledge Management

Oracle Knowledge Management offers unparalleled capabilities for content authoring and search, which helps to find answers quickly and provides information in an efficient and consistent way across channels. Siebel CRM integration with Oracle Knowledge will enhance the service management capabilities by giving easy access to the knowledge repository for call center agents, case workers, or technicians to do their job.

While the knowledge repository of articles, guides, and so on are being created and managed in Oracle Knowledge with keywords, the integration will enable searching them directly from a service request. This integration will also support a multilingual knowledge base. To learn more, refer to Oracle Fusion Knowledge Management.

Industry Solutions

Siebel CRM has a rich history as a leading industry CRM platform providing applications, extensive schema, and proven business processes and workflows, all developed using industry best practices and designed to operate at extreme scale. With the evolution of CRM, CX, and full stack modernization, our strategy is to continue to build on our industry gold standard applications to provide interoperability across front- and back-office industry solutions.

Communications - Digital Business Experience

Communication service providers (CSPs) seek a comprehensive solution offering rich, communications-specific capabilities, and telecommunications customers expect proven, risk-free, cost-effective, and modernized solutions. Oracle Communications Digital Business Experience meets both demands, providing an end-to-end concept-to-cash-to-care process solution that eliminates the process proliferation and fragmented data that lead to disjointed customer experiences, order fallout, revenue leakage, and IT complexity. An evolution of Oracle Rapid Offer Design and Order Delivery (RODOD), this solution accelerates first-time deployment and time-to-market for new projects by defining a standard SaaS-like solution that reduces the up-front installation and configuration cost, complexity, risk, and overall time-to-market while retaining full control of deployment, configuration, and management across public cloud, private cloud, and on-premises.

Business benefits include:

- Manage experiences and revenue at every stage of the customer journey
- Grow revenue by rapidly launching offers, efficiently delivering orders, and monetizing anything
- Drive loyalty with intelligent, personalized, and proactive customer care across channels
- Improve business agility with a full-featured, productized, and configurable solution
- Increase operational efficiency with a flexible, future-proof architecture

Figure 3. The illustration of the Oracle Digital Business Experience solution for Communications across B2C and B2B.

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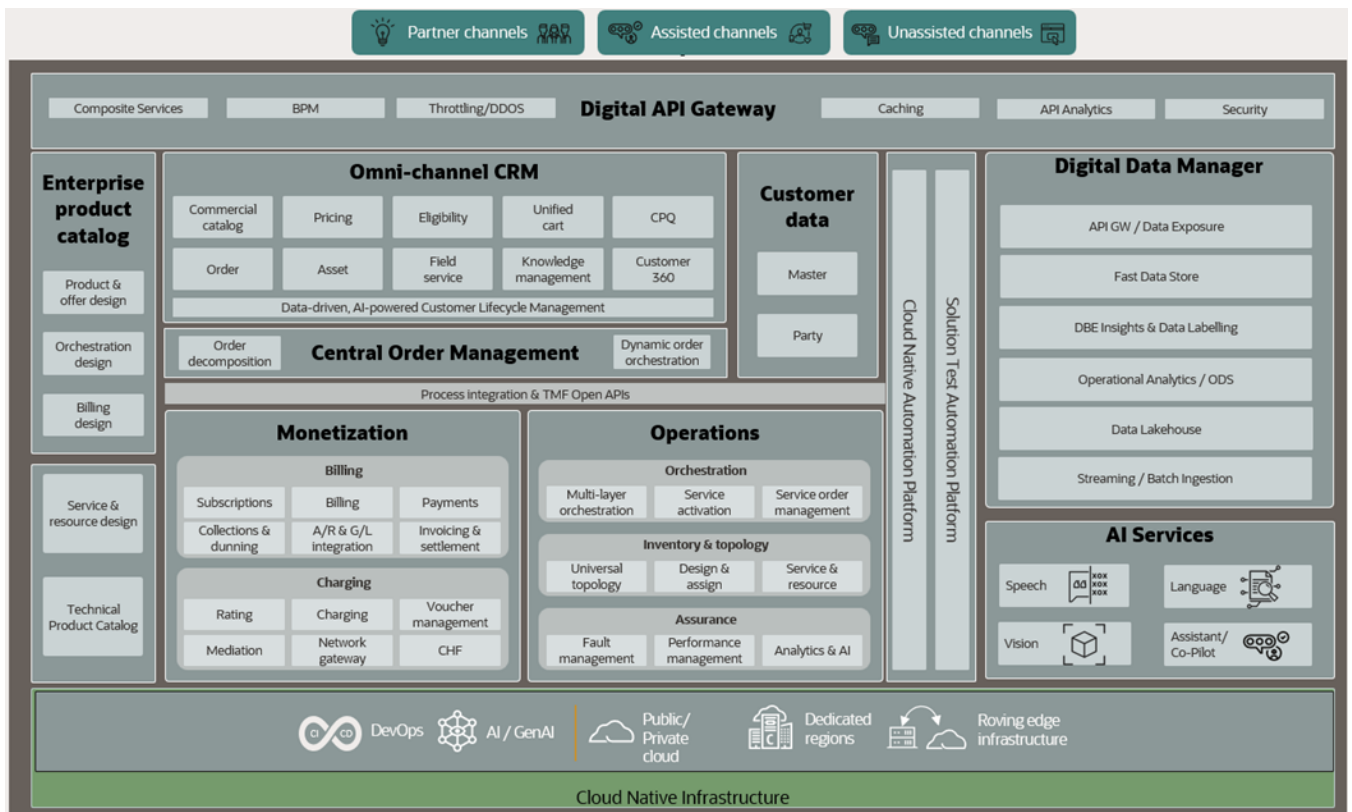
Key components include:

- Launch Experience as the enterprise product catalog.

- Siebel CRM as the omnichannel ordering engine for assisted and unassisted channels.

- Order Service Management (OSM) for Order Orchestration.

- Billing and Revenue Management (BRM) for monetization.

- Application Integration Architecture (AIA) for business process integration.

Reduce Time to Market for New Offers

With Digital Business Experience, CSPs can intuitively design multidimensional offers faster with an intelligence-enabled, GUI-based enterprise. Fusion Launch Experience is an open standards-based, centralized product catalog that provides a simplified and intuitive design time experience for modeling products, services, promotions, and pricing strategies with productized publishing to Siebel CRM and BRM runtime catalog consuming applications.

Built using the GB932 SID model, TMF Open APIs (TMF 620, TMF 633, TMF 637 and TMF 671), and Redwood UX, Launch Experience comes with comprehensive product and release lifecycle management capabilities, an intuitive user experience for business users, and a low-code approach to distributing a product catalog in a heterogeneous eco-system.

Accurate Quote and Order Capture and Delivery

With its unified sales catalog and omnichannel shopping cart (quote) and ordering, Digital Business Experience ensures that the offers created in the product catalog retain data consistency across applications and channels so that orders can be captured accurately. Real-time quote and order validation checks, qualifications, and resource reservations ensure that only eligible services can be delivered or sold.

Monetize Anything

Digital Business Experience enables service providers to use multiple pricing levers, such as event, metric, attribute, deliverable, day, time, QoS, and custom rules. It also allows providers to bundle physical and digital goods, one-time activities, metered and continuous services, and offers services as prepaid or postpaid services with recurring, one-time, or subscription billing options across any network generation (2G-5G).

Personalized Customer Experience

Consolidating your customer data is the first step in delivering a personalized customer experience throughout the customer journey. Digital Business Experience brings together customer and product data across the systems of record and engagement to deliver a complete, 360° view of the customer. With a strong data foundation, service providers can apply intelligence models, including AI and GenAI, to personalize engagements and experiences for customers.

Proactive Customer Care

Proactive customer care drives better customer experience and deflects calls away from the contact center to self-service channels to improve transparency and empower customers to take control of their experience. The solution is open, extensible with TeleManagement Forum (TMF)'s Open Digital Architecture (ODA), and aligns with open API standards that enable you to integrate with your self-service channels.

Further enhancements include modernization of user experiences, feature enhancements across all the applications in the solution and cloud operations automation, Kubernetes, and DevOps tooling in the following areas:

- REST API-based integration of Launch to Siebel and BRM Pricing Design Center (PDC)

- New modernized Customer 360° dashboard

- Modern conversation Siebel Communications UX for agent-assisted ordering and moving average convergence/divergence (MACD) using Oracle Redwood UX components and the Siebel Open UI framework

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- Enhanced digital APIs for self-service channels

- Enhanced cloud native tools for deployment, scaling, and management

- TMF API-based, productized integration of Launch and Service Catalog Design

- TMF API-based solution for B2C & B2B mass market

- Enhancements for B2B enterprise connectivity

For more information on Digital Business Experience, refer to Digital Business Experience.

Clinical Trials

Siebel Clinical Trial Management System (CTMS) is a market leading industry solution for complete management of critical clinical trial activities.

Key features include:

- Comprehensive, scalable, integrated trial management suite that improves operational efficiency by standardizing clinical operations workflows and providing real-time visibility to data.

- Trial management capabilities that help you manage and monitor trial operations from start to finish.

- Improved data quality with configurable workflows to meet individual customer processes for all research studies.

- Integration capabilities with advanced analytics that provide you with timely, fact-based insight into clinical programs to drive informed business decisions.

Siebel CTMS provides site visit and trip report functionality to conduct clinical site monitoring as required by Good Clinical Practice (GCP) guidance and regulations. These features are some of the most highly used features in Siebel CTMS by clinical research associates (CRAs) within pharmaceutical companies and clinical research organizations (CROs).

Key features planned for Siebel CTMS Mobile include:

- Additional functionality to the trip report for both online and offline capabilities, including support for adding attendees and comments, having embedded SmartScript logic in questionnaires, a subject status snapshot, and improved navigation for trip reports.

- Due to limited or unreliable Wi-Fi/cellular connectivity in certain hospitals, medical centers, clinics, or doctors' offices where clinical trials are conducted, the added mobile offline capabilities will enable CRAs to complete trip reports in offline mode. Alternatively, this enables the CRA to work on the trip report in transit while traveling to or from a clinical site. The enhanced features add flexibility and efficiency to work conducted by key users of Siebel CTMS.

- Improved user experience from the adoption of additional Siebel Open UI framework enhancements and Redwood UX.

For more information on Siebel Clinical Trial Management, refer to Siebel Clinical Trial Management System.

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Platform & Operations

The following innovations help to improve Siebel CRM application operations, architecture and reduce TCO.

Developer Experience

Web Tools & Workspaces

As Web Tools evolves, our goal is to fully replicate all the Siebel Tools functionality in Web Tools, including the remaining features for workspaces and migration. Additional enhancements will improve the developer experience, boost productivity, and increase flexibility in migration while minimizing downtime.

Developer experience enhancements planned for future releases include:

- Applet Editor usability enhancements

- Natural language-based configuration using GenAI – "Developer Assist"

- Properties Pane to make it easier to view and update object properties

- Visual comparison for Workflow Processes and Tasks, making resolution of customer and Oracle changes easier

- New Applet wizards for multi-value group (MVG)/Pick/Tree Applets

- Defer saving of changes in Workflow Processes/Task/Applet editors until completion of the configuration work

Test-Driven Development

The Open UI Test Automation framework is continuously enhanced, leading to improved usability, agility, and reduction in associated costs. The test automation capabilities allow organizations to adopt a test-driven development (TDD) approach into their agile development processes. The creation of an automated test script should ideally become a part of Definition of Done (DoD), to ensure automated test coverage for new configuration in the Siebel CRM implementation.

New enhancements planned for delivery include:
- Incorporating AI/ML to reduce test script authoring and failure analysis efforts.

- Dashboard for insights on historical data, current running status, and pending actions.

Integration

Our objective is to ensure Siebel CRM applications remain as open and flexible as possible to maximize leverage and support the broadest of enterprise requirements.

REST APIs

We intend to deliver the ability to version REST APIs to enhance the existing Siebel CRM REST APIs. Over time, the current REST API functionality and future enhancements will be incorporated into the Siebel Open Integration framework.

Improved performance and scalability of Siebel CRM REST APIs

Performant REST APIs are critical for mission critical applications, for which we will benchmark the performance and scalability of REST APIs under high load conditions. The goal is to prove linear scalability and low response times under high load conditions through multiple scenarios leveraging data APIs, workflows, and business services resource categories.

Event Pub/Sub framework

Key enhancements to our Event Pub/Sub framework planned for delivery:
- Support for Kafka partitions and failover.

- Support for Avro serialization.

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- Support to work with Confluent Cloud natively from Siebel CRM.

- Align the Event Pub/Sub infrastructure to Siebel Open Integration for greater flexibility of publishing or subscribing to any event format and binding the same back to Siebel CRM native events. Native events can include Siebel runtime events or synchronous method invocation to or from the Siebel Server.

Siebel Open Integration

Modern digital channels now require APIs to support more omnichannel capability for organizations. Our strategy is to align with MACH architecture principles, which implies that Siebel CRM along with several other applications are used in a headless mode to enable a seamless customer journey orchestrated by invoking APIs across applications.

With the essentially unlimited customization capabilities of Siebel CRM applications, our customers have been successful in configuring unique business processes through different layers of the application. It's also common for some processes to be designed for specific business users and therefore tightly coupled with the Siebel UI.

To achieve the omnichannel capability using APIs and expose processes designed in Siebel CRM externally for consumption by other applications, we are introducing a new feature called Siebel Open Integration.

This feature offers the ability to create and execute REST APIs that use Applets, Views, Business Services and Workflow Process artifacts within Siebel CRM in an automated manner. It supports both out-of-the-box and customized artifacts, ensuring maximum reuse of existing user-driven business processes in Siebel CRM.

Siebel Open Integration provides access to the data and all specialized business processes or custom business functionality that are typically triggered by a user interaction on a UI applet via a REST API.

To understand the value and ROI achieved with Siebel Open Integration, let's look at an example:
- Consider a business rule configured in Siebel CRM where the Account Name field is not editable when the Account Status field is set to Active.

- With existing data APIs, this logic is not available via an API call and the state also cannot be transferred. You may have to use another application to manage the UI rendering and make the field non-editable.

- With the new Open Integration APIs, this business rule can be easily configured. The other application can just use metadata to render it appropriately.

- The Open Integration API saves a lot of time, effort, and coding required to interoperate seamlessly with existing Siebel CRM user-driven processes across external applications.

Table 3. Example showing the Open Integration API comparison to existing API to leverage the UI-level business logic.

	Example	Open Integration APIs	Existing Data APIs
Rendering	Render it as non-editable	✗	✗
State	Not Editable	✓	✗
Rules	Name is not editable when Status is "Active"	✓	✗
Data	Account Details: Name, Status….	✓	✓

Siebel Open Integration will simplify and enable the following use cases:

- Complete "headless" operation:

  - Support the simplified and faster creation of customized user interfaces outside of the Siebel CRM Open UI framework.

  - Support IoT driven event flows that provide end-to-end, straight-through processing of existing Siebel CRM business processes.

- Enable advanced AI solutions, such as GenAI, to run on the Siebel CRM application deployment for accessing data and executing processes.

- Leverage the Retrieval Augmented Generation (RAG) framework within Siebel CRM to retrieve relevant data for GenAI, making it a more relevant and trusted Large Language Model (LLM) using private business data. This will help customers to retrieve and use the most relevant data for building and augmenting prompts and generating the desired output, which is highly contextual.

- Reduced effort and technical debt:

  - Enable maximum reuse and reduce development overhead by using REST APIs that honor the unique processes customers have developed over the years.

  - Eliminate the need to rewrite UI-level processes as business services or workflows for a third-party application to access them. This avoids considerable amounts of technical debt and configuration effort.

- Improved developer agility:

  - Help developers with specific metadata information when generating a new UI with an alternate framework with REST APIs generated using Siebel Open Integration. This includes Oracle's "no-code" and "low-code" development tools, such as Visual Builder Cloud Service and APEX.

  - Support to simplify the "mashing up" of applications with a common interface.

- Support scale and performance:

  - Support execution of REST APIs to access functionality in a performant and scalable manner, which is in line with existing REST APIs used for Siebel CRM data access.

Open Integration framework

Our goal is to make Siebel Open Integration as the framework for extending Siebel CRM with all current and future interfacing standards, covering all Siebel CRM artifacts, such as Business Components, Business Services, Applets, Workflows, and so on. As Open UI is our open framework for customized UX solutions, Siebel Open Integration will encapsulate all the integration interfaces for Siebel CRM.

Under the hood, the new Siebel Open Integration framework for UI level artifacts will be extended and used for all APIs. This framework will run on Helidon and eventually replace the existing application interface, which is based on Tomcat.

Helidon provides numerous benefits—it's cloud native ready, provides a fast start-up time, has low memory consumption, and a small disk footprint. It also comes with a full observability stack as standard, including health checks, metrics, tracing, and logging.

We also intend to include support for all typical modes of communication that is expected between the microservices in a modern digital architecture for any trigger or touchpoint inside existing Siebel Applications.

Siebel Application Triggers and External Interfaces

- **Business Actions (Services, CRUD, Applet Methods)**

  - **Inbound REST API Calls**: Used with idempotence (as needed).

  - **Event Subscription**: Used for event-based integrations.

- **Synchronous Calls from Siebel**

  - **Outbound REST API Calls**: Includes retry mechanisms.

  - **Event Publication**: Used for publishing events externally.

- **Siebel Event Triggers (such as runtime events)**

  - **Outbound REST API Calls**: Includes retry mechanisms.

- **Event Publication**: Used for publishing events externally.

Deployment & Operations

These are new features planned for delivery that align to cloud native principles and best practices to enhance application operations and reduce TCO across all functions of DevOps - continuous integration and continuous delivery (CI/CD).

Siebel Cloud Manager

SCM is an automation application that dramatically simplifies "lift and shift" of existing Siebel CRM enterprises from on-premises hardware to a Kubernetes and Ansible-orchestrated deployment and operation in the cloud or on-premises. Additionally, it supports enhanced Siebel operations using GitOps.

In addition, it allows for the creation of new, greenfield Siebel CRM deployments in the cloud or on-premises in just a few steps. SCM currently supports OCI, on-premises, or any standards-compliant cloud for Siebel CRM deployments.

Key benefits include:

- Allows easy and quick (and therefore low cost) migration to the cloud with the latest technologies from existing on-premises deployments, typically in hours.

- Allows easy creation, modification, and deletion of both lifted-and-shifted as well as "greenfield" Siebel deployments in the cloud.

- Offers an ultramodern cloud native Observability stack covering both metrics monitoring and log analytics for your complete Siebel CRM deployment.

- Enables CI/CD pipeline-based development for Siebel CRM in the cloud.

- Provides the latest cloud architecture, technology, security, scalability, and performance options for your Siebel CRM deployment along with proven automation tools that work at web scale.

- Helps organizations continue to reap the benefits of years of investments made in the Siebel CRM application with a future-proof platform architecture.

- Eliminates business disruption due to new training requirements as the Siebel CRM application functionality remains unchanged.

- Allows automated creation of all cloud resources as well as bring your own resources (BYOR) that allow custom fitment to any existing cloud eco-system.

- Supports using on-premises database for Siebel servers deployed in the cloud, provided latency requirements can be met.

For more information on Siebel Cloud Manager, refer to OCI Migration Hub – Siebel CRM.

Key enhancements planned for delivery:

- Feature-rich CI/CD pipeline-based automation for Siebel CRM development in the cloud.

- Templates for automated dynamic scaling.

- Using Git repository and distribution of your choice.

- Enhanced Monitoring using queries of own choice by connecting to tables in the database.

- Support for Oracle Compute Cloud@Customer and Oracle Private Cloud Appliances offerings.

With these enhancements, we can support various deployment options and use cases.

Table 2. Deployment use cases that SCM will aim to manage and deploy.

Use Case/Requirement	Planned Offering
Customers operating Siebel CRM on-premises deployed in their data center.	Enhancing present deployment by connecting to an observability stack, which is deployed using SCM. This in turn will be compatible with any CNCF Kubernetes distribution such as OpenShift or Oracle Cloud Native Environment (OCNE).
Customers hosting Siebel CRM on a VM-based deployment on OCI.	Enhancing present deployment by connecting to an observability stack, which is deployed using SCM.
Customers hosting Siebel CRM on OCI and wants to modernize operations by using Kubernetes.	Siebel CRM "Lift & Shift" to OCI OKE (Kubernetes) – Lifting from on-premises data center and deploying it on OKE cluster using SCM, with monitoring and logging through an observability stack, and auto-scaling of Siebel servers.
Customers hosting Siebel CRM on OCI and wants to modernize operations by using Kubernetes. In addition, wants to use the Kubernetes-based platform tooling to build, deploy and operate Siebel CRM services alongside other microservices.	For customers moving to OCI, "Lift & Shift" to OCI OKE (Kubernetes) – Lifting from on-premises data center and deploying it on OKE cluster. For customers deploying on-premises, "Lift & Shift" to relevant Kubernetes distribution (OpenShift or OCNE) – Lifting from present deployment and deploying on Kubernetes Cluster, with monitoring and logging through an observability stack. Each Siebel CRM service instance to be deployed natively on Kubernetes as an independent pod, and thus scaled up or down using native Kubernetes mechanisms.
Customers hosting Siebel CRM on any CNCF Standards-compliant cloud.	Using SCM to deploy and manage Siebel CRM, along with a cloud native modern observability stack, by leveraging BYOR in the respective cloud environment.

Reducing costs, while improving application performance and agility

- Customers that run Siebel CRM in OCI typically see reduced TCO and improved application performance.

- In addition to the cost and performance benefits of running Siebel CRM in OCI, Kubernetes can be used to achieve easier scalability, high availability, resource efficiency, self-healing capabilities, portability, and support for implementing superior DevOps and DevSecOps practices.

- We are committed to offering our customers the choice of selecting their preferred location for operating their Siebel CRM application on cloud infrastructure. Whether using traditional deployment mode or Kubernetes, there are proven case studies that highlight the ROI and the flexibility of running Siebel CRM on OCI at extreme scale.

- Example case studies for Siebel CRM on OCI include TIM Brazil, American Airlines, Vodafone, and TATA Motors.

- Performance and scalability for the Siebel CRM application is continuously measured and enhanced. As a result of analyzing a sample set of real-world customer benchmarks—and understanding the scalability requirements for transactions per second and the underlying hardware—we are streamlining our application to reduce cost and further improve scalability.

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Auto-Scaling with Kubernetes

Auto-scaling of Siebel CRM deployments benefits customers managing mission-critical business processes for enterprise scale loads, particularly while ensuring that user experiences do not suffer under demand surges. The auto scale-up of Siebel servers is achieved when deployed with Siebel CRM running in a Kubernetes cluster.

Observability & Analysis

Siebel CRM offers cloud native observability for metrics and logging, which is deployable across platforms with the use of SCM. It supports OCI OKE, on-premises Oracle Cloud Native Environment, and any CNCF-compliant Kubernetes distribution, providing flexibility in deployment.

In future releases, the Siebel CRM observability stack will support on-premises or OCI deployments (on virtual machines (VMs) or Kubernetes) that are not managed by SCM. SCM will be used solely to set up the observability stack, with on-premises deployments connecting to observability either locally or via OCI.

The observability stack uses best-of-breed tools, such as Prometheus, Grafana, OpenSearch, Fluentd, OCI Services, and so on. It will align the Siebel CRM architecture with more additional CNCF-based foundation criteria for cloud native deployment best practices (even in the customer's data center). Additionally, this stack will help with automatic decision making for dynamic scaling of a Siebel CRM deployment, early detection of potential failures (deterministic/AI-based/probabilistic/other strategies), automated corrective actions for large-scale deployments, and so on.

Upgrades & Updates

An enterprise application, such as Siebel CRM, requires regular updates to ensure compatility and interoperability with other products, and to minimize the chance of exploitation of security vulnerabilities in older versions. To assist our customers and integration partners get up to date and stay there, we are committed to streamlining all aspects of the upgrade process, from concept through go-live and onward with regular application of monthly updates. Key features planned for delivery include:

Continous Monthly Updates

- Informative formal documentation on the monthly updates without any downtime.

- Elimination of the need for downtime during schema maintenance for migration or monthly updates.

- Increased training opportunities for partners and customers to prepare for upgrading and staying current.

- Acceleration of feature uptake by reducing the possible conflicts after importing updated repository objects as part of a monthly update.

One-Time Upgrade

- Enhanced pre-upgrade analysis to better predict effort and resourcing needs.

- Streamlined upgrade/IRM conflict resolution by improving the merge logic.

- Improved post-upgrade retrofitting of visual elements, such as applets or views, and process flows, such as Workflows and Tasks, using new visual comparison tools.

- Reduced upgrade time through optimization of queries and offloading steps before or after the downtime window when possible.

- Improved training specific to upgrades and the fundamental changes in the Siebel CRM architecture and development process to help customers gain the critical knowledge required to move to modern versions from versions earlier than Innovation Pack 2017.

Data Archival

With time, the volume of data in the Siebel CRM database increases, particularly for key objects, such as activities and service requests. Eventually, that data does not provide any day-to-day value and can lead to performance problems. At the same time, customers might not want to remove all the data entirely in case it's needed unexpectedly.

An enhanced data archival approach will offer a mechanism to address these issues, including:
- Intelligent data archival recommendations using AI based on customizable rules, such as "archive service requests older than five years that are closed and have no new references to them".

- Configurable scoring levels to automate archival without the need for human involvement at certain score thresholds.

- Archived data will be placed in offline storage, for example, as JSON files in Object Storage, which is an inexpensive storage mechanism.

- End users can retrieve archived records by restoring the data into the active Siebel CRM database as needed.

- The use of AI in the data archival process will allow it to learn from retrievals to improve automated archiving over time.

Platform

Platform & Certification Updates

Updates are posted on My Oracle Support when more recent Siebel CRM Monthly Updates supersede existing platform certifications.

New certification updates planned for Siebel CRM include:
- Third party updates within the product for improved features and security

- JAVA 21 certification

- Oracle Enterprise Linux 9 certification

- Oracle 19c database client certification to openly support Oracle Databases via Client / Server Interoperability Support Matrix for Different Oracle Versions (Doc ID 207303.1), including 23ai database

- Open JMS 2.0 (JSR343) certification for broader integration support

Platform Features
To continue to provide more flexibility for the Siebel CRM platform for heterogeneous deployment, the following features are planned for delivery:
- Reduce platform proprietary dependencies, such as Microsoft Windows-specific dependencies, including use of Component Object Model (COM) for the Document Server.

- Provide better vertical scaling and memory management through a fully cross platform 64-bit architecture.

- Provide an integrated installation experience for all Siebel components to reduce deployment TCO.

Siebel Email Response
- Siebel Email Response plans to support the OAuth 2.0 protocol, an industry-standard for managing authentication, for outbound SMTP. This feature will allow users to use the security features of Azure Active Directory for authenticating with Microsoft Exchange Online when sending outbound emails from Siebel applications.

- We will replace the third-party Rosette library with the open-source International Components for Unicode (ICU) to support Unicode conversion for Siebel Email Response. This feature will enable Siebel Email Response to comply with globalization security standards.

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Email Marketing - OCI Email Delivery Service

Currently, Siebel Email Marketing server supports AUTH LOGIN authentication mechanism only. We intend to deliver a feature to support AUTH PLAIN authentication mechanism in the Email Sending Daemon (ESD) of EMS. This feature will provide the ability to use the Oracle Cloud Infrastructure (OCI) Email Delivery Service for email campaigns.

Authentication scenarios and applicable AUTH mechanisms:

- When SMTP server supports only AUTH PLAIN, AUTH PLAIN will be used for authentication.

- When SMTP server supports only AUTH LOGIN, AUTH LOGIN will be used for authentication.

- When SMTP server supports both AUTH LOGIN & AUTH PLAIN, AUTH LOGIN will be used for authentication.

Server Sync for Microsoft Exchange Server to Office 365

Siebel Server Sync for Microsoft Exchange Server (SSSE) integration to Office 365 will be enhanced to use the Graph API from Microsoft, which is a REST-based API to access Microsoft cloud service resources.

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Oracle Support & Services

Oracle's Support Value

Oracle's Siebel CRM is a sophisticated, highly scalable, flexible, reliable, and mission-critical application for large enterprises across diverse industries. With strong adoption and continued innovation over the years, Siebel CRM enables customers to innovate to keep up with the latest trends in customer experience and adopt new technology.

Only Oracle can provide the product support and development expertise your business-critical Siebel CRM deployment demands. As such, it is important not to underestimate the value of continued Oracle Support for your business-critical Siebel CRM implementation.

Key benefits include:

- Monthly updates packed with new features, enhancements, and cumulative bug fixes.

- Security patches, fixes, and configuration-specific update recommendations.

- Lifetime support and 24/7 access to Oracle Software experts.

- Technical resources, alerts, and proactive support tools.

- Software support across the complete stack.

If you are looking to get the most out of your Siebel CRM support investment, a great place to start is with the "Get Proactive!" page (Doc ID 432.1) on My Oracle Support.

Further, if you have any queries about Siebel CRM, such as long-term roadmap, new releases, patches, enhancements, or licensing, please do not hesitate to contact the team now on +1 (888) 545-4577. Alternate regional contact numbers are available here: Oracle Global Support Contacts.

Lead with Cutting-Edge Siebel CRM Advancements

Oracle's "Applications Unlimited" is a testament to our dedication since 2007 to consistently elevate and innovate our application suites, including Siebel CRM.

Driven by a visionary approach to Siebel CRM innovation, Oracle continually delivers ongoing, substantial enhancements in easily consumable cumulative updates, enriching Siebel CRM with new functionalities, module expansions, and features inspired by valuable customer feedback. Users of Siebel CRM 8.1.1 or 8.2.2 base release, including subsequent point releases, benefit from these Siebel CRM Monthly Updates, ensuring they are always at the forefront of the CRM technology.

Oracle's Siebel CRM Support Timelines for Releases in Premier Support

For information regarding older releases and the support extension for Siebel CRM versions with the base code line 8.1/8.2, refer to the Lifetime Support Policy for Oracle Applications on My Oracle Support.

For more information on Premier Support, refer to Oracle Premier Support. Special attention should also be given to the Oracle Siebel CRM Error Correction Policy (Doc ID 1313941.1), which outlines the specific patches for releases that are available within the Premier Support timeline.

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Staying Informed

The best way to keep up to date with all the latest Siebel CRM news, innovations, and events, and to participate in our product direction, is to join our Customer Advisory Board (CAB).

Joining the Siebel CRM Customer Advisory Board

The Siebel CRM Customer Advisory Board (CAB), one of many groups falling under Oracle's Global Customer Programs Community, has been vital in helping customers collaborate, share ideas, and drive our product roadmap for 30 years. We welcome all customers and partners to join our CAB regardless of size or industry. For more information about the Siebel CRM CAB program, read this article.

Join the CAB in just 3 simple steps:
1. Click here to join our CAB mailing list.
2. Request access to the private Siebel CRM Customer Connect group on LinkedIn.
3. Register for Cloud Customer Connect and follow Siebel CRM as one of your topic interests.

Beta Program

The Siebel CRM Product Management team welcomes all Siebel CRM CAB members to collaborate with us through our Beta program. The Siebel CRM Beta program provides a unique opportunity for your voice to be heard regarding product features and innovations currently in development, and some Beta features may additionally include the option to deploy software before general availability for testing and Beta feedback purposes. Oracle provides access to Beta programs through self-nomination only. This can be easily done by completing this form, and we routinely have multiple Beta features for which we welcome your active participation.

Oracle Customer Services

A variety of services and offers are available from Oracle Customer Success Services and Oracle Consulting to assist Siebel CRM customers with their implementations.

Oracle Customer Success Services

Oracle Customer Success Services (CSS) provide a variety of high value services for Siebel CRM customers. "Run and operate" services are a powerful element of what CSS offers. CSS helps you run and operate your IT environment at peak efficiency by providing the hands-on assistance you need to execute infrastructure, database, and application initiatives successfully.

Oracle Consulting Siebel CRM Accelerator Services

Oracle Consulting provide the following accelerator services for Siebel CRM customers to fast-track adoption of high value innovations.

Table 5. Accelerator services and the ROI.

Accelerator	ROI
Upgrade	Upgrade accelerator designed to save 76% of manual effort through automation
UX Productivity	Rapid UX improvement with plug and play productivity boosters for Open UI
CI/CD Pipelines	DevOps and Automation, including customer setup, integration, and handover
Test Automation	Services to accelerate Siebel test automation setup, test script development training, and test management using Jenkins
AI Services	Add AI to Siebel with OCI AI Services across a variety of use cases
AI/ML Services	Accelerator for business insights (patterns & correlation), prediction, tracing, and so on across multiple vertical industry use cases. Built on Oracle's modern data platform, combining multiple data sources
Intelligent Advisor	Add Oracle Intelligent Advisor (OIA) to Siebel with prebuilt automation to accelerate setup or integration and rules development
Analytics Cloud	Prebuilt data model, extract, transform, and load (ETL) flows, presentation layer that saves 100 man-days

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