



# OASIS CRM

Combine Marketing, Sales and Service into a Single, Customizable Platform.

After years of cutting costs and downsizing, CEOs are finally putting growth back on the corporate agenda—and setting extremely aggressive revenue goals in the process. To reach their ambitious target numbers, sales professionals require state-of-the-art tools that help them develop accurate forecasts, share information seamlessly between geographically dispersed teams, generate customized customer quotes, and close more deals more quickly.

## Gain Insight into Sales Activities

### Designed to Work

OASIS CRM provides complete sales pipeline management. All applications in this suite address a specific part of the sales process and are designed to work together to improve overall sales efficiency and cost-effectiveness.

Sales organizations are under increased pressure—from both internal and external forces—to improve effectiveness while containing costs. Internally, directives from high up in the organization require your sales team to achieve higher conversion rates and generate more revenue more quickly than ever before. Your sales team also faces considerable external challenges. The traditional sales cycle is quickly vanishing, as brand loyalty erodes, regulations multiply, consumer expectations increase, and alternative channels proliferate. Your team must have up-to-the-minute knowledge of everything happening in the pipeline to succeed in today's much more fluid and complex sales environment.

Even though your organization undoubtedly collects large amounts of data on virtually all aspects of the sales process, this data is most likely scattered among multiple, disparate applications—both legacy and personal-productivity. You struggle to consolidate the data and make sense of it.

With OASIS CRM, you can replace all these standalone systems with a single software suite that provides you with an integrated view of all your sales activities. This enables you to measure the effectiveness of your spending and streamline sales processes, boosting the productivity of individual sales professionals while increasing the effectiveness of your sales organization as a whole.

### Benefit from Next-Generation Software Today

Sales force automation applications must continually evolve to meet the increasing demands of sales professionals. Although first-generation solutions were a clear improvement over manual processes, these basic solutions have been outpaced by the fast-moving demands of an increasingly complex competitive climate.

In response to market demands and customer feedback, OASIS CRM next-generation functionality addresses five key areas:

- **Sales effectiveness.** OASIS CRM enables individual salespeople to segment their territories, prioritize actions, and collaborate with other team members, using proven best practices.
- **Management effectiveness.** By identifying and diagnosing problems, OASIS CRM allows you to deliver effective coaching that's tailored to the needs of each salesperson.
- **Customer relationship effectiveness.** Your organization needs a 360-degree view of all customer interactions. OASIS CRM makes this information easily accessible to all stakeholders, allowing them to anticipate customer needs, improve responsiveness, enhance customer satisfaction, and increase loyalty.

- **Enterprise alignment.** OASIS CRM helps your sales organization collaborate with other organizations—such as marketing, product development, inventory management, and financial planning—that are performing critical corporate functions in your enterprise.
- **Business insight.** OASIS CRM gives you access to the right information in a timely manner. From the real-time comprehensive view of your entire sales organization, you can execute tactical and strategic decisions that immediately influence your bottom line.

### Move Beyond Automation to Actionable Insight

Improving sales effectiveness involves much more than simply automating the discrete tasks that sales professionals perform. You need timely access to comprehensive, accurate information that lets you know what is happening at every step of the sales process. OASIS CRM gives you this comprehensive view, helping you do everything from qualifying prospects to developing customer proposals, delivering successful presentations, tracking opportunities through the pipeline, and providing stellar after-sales support.

- **Visibility into the sales pipeline.** Complete visibility into the sales pipeline lets your sales team allocate resources more effectively, systematically diagnose any problems, and proactively resolve issues. OASIS CRM lets you see the actual opportunities the sales force is pursuing and helps you manage those opportunities.
- **Access to sophisticated sales analytics.** To close more business, the entire sales organization—from senior management to individual salespeople—must have access to up-to-the-minute intelligence regarding pipeline trends, product demand, competitive trends, and the overall performance of the sales network. OASIS CRM enables your sales executives to track the overall health of the business by providing them with access to key performance metrics that monitor whether your organization is on track to satisfy strategic objectives.
- **Support for best practices.** Sales organizations need to follow best practices that maximize sales effectiveness and ensure consistent execution across all sales channels. This means implementing sales automation tools that support leading sales methodologies such as Enterprise Selling Process (ESP), Target Account Selling (TAS), and Portfolio Management Process (PMP). By driving common, consistent processes that focus your efforts on achieving revenue targets, OASIS CRM helps you leverage resources develop strategic accounts and protect established accounts against competitors.

### Maximize Sales Effectiveness

To become best-in-class, a sales organization must have a sales automation solution that increases sales effectiveness by addressing these key issues:

- Pipeline visibility
- Sales analytics
- Best practices

## Exceed Sales Goals with Functionally Rich Software

Whether deployed separately or in combination, the applications in the OASIS CRM suite give you rapid access to actionable information, enabling you to serve your customers more effectively across multiple channels. The applications in the OASIS CRM portfolio fall into four main categories:

- **OASIS CRM.** With OASIS Mobile Sales applications, your sales professionals can efficiently schedule, monitor, and track all account-related activities. Contact- and opportunity- management features help your sales force quickly access all relevant information to meet the demands of any sales situation they face at any time.
- **OASIS Mobile Sales.** OASIS CRM provides the members of your mobile sales force with real-time access to critical information any time and anywhere they need it. In addition to fully supporting field sales, telesales, and telemarketing professionals, OASIS Mobile Sales meets the needs of participants in the extended enterprise, such as third-party resellers and business partners. Additionally, users of OASIS Mobile Sales have wireless and voice access to data stored in all other OASIS CRM applications.
- **OASIS eBriefings.** OASIS eBriefings is a knowledge-management tool that pulls content from multiple external sources, aggregates that information with internal information from other OASIS CRM applications, and makes it available to users on a personalized Web page.
- **OASIS Sales Analytics.** The OASIS CRM suite also includes OASIS Sales Analytics, a comprehensive solution that provides timely, fact-based insight into the entire sales process. All users—from sales executives to frontline sales representatives—get up-to-the-minute, in-context sales insight that is personalized and immediately actionable.

## Get a Competitive Advantage with OASIS CRM

Designed to help globally dispersed field sales organizations focus on the right deals at the right time, OASIS CRM applications have been proven to grow revenues quickly and profitably. OASIS CRM includes the following key applications:

- **OASIS Opportunity Management.** Gives you a complete picture of each opportunity, including history, key decision-makers associated with it, and all milestones. This application also tracks the source of each lead, the actions of other vendors competing for the business, and the customer's key decision criteria. By consolidating all information about a particular opportunity in one place, OASIS Opportunity Management brings new team members up to speed quickly and easily.
- **OASIS CRM Forecasting.** Provides real-time graphical analysis and reporting along with snapshots of forecasting information over time. It eliminates the time-consuming and cumbersome manual processes formerly required to create forecasts, helping sales organizations of all sizes and types monitor the health of their business, accurately assess upcoming opportunities, and better meet sales goals—all in real time. OASIS CRM Forecasting helps your team proactively manage revenues by account, opportunity, product line, project, partner, division, organization, or employee. It also lets you conduct comprehensive matrix organization forecasting and sales team revenue allocation. With OASIS CRM Forecasting, your organization can manage recurring revenues and multiple currencies, and can complete robust currency conversions instantaneously.
- **OASIS Contact Management.** Ensures sales effectiveness by giving your sales team immediate access to a comprehensive view of every customer. OASIS Contact Management provides salespeople with a complete history of all customer interactions, including all inbound and outbound calls, e-mail exchanges, written correspondence, site visits, meetings, and product demos.
- **OASIS Activity Management.** Helps you schedule items on your to-do list, develop activity plans, manage the completion of complex tasks, and delegate tasks to others. Additionally, OASIS Activity Management enables you to synchronize activity, contact, and calendar information with popular personal information managers such as Microsoft Outlook, IBM Lotus Notes, and applications running on Palm OS devices.

### Triangulated Forecasting

To maximize forecasting accuracy, organizations should assess forecasts from three perspectives.

- The field perspective, or “field assessment,” is based on a rollup of individual forecasts that provides you with a bottom-up view of current market conditions
- The pipeline perspective, or “pipeline assessment,” is generated by analysis opportunities at each stage of the pipeline, enabling you to assess sales targets from an aggregate, top-down perspective
- The historical perspective, or “analytical assessment,” is based on a comparison of current pipeline data with historical trends, helping your company apply knowledge gained from prior periods to current sales activities

“OASIS’s CRM applications improved our ability to see our business in new ways and enabled us to serve our customers better than before. As our people learn to use the tools better, our benefits will continue to grow.”

**Ric Villarreal**

Senior Vice President,  
Chief Information Officer, and  
Special Assistant to the Chairman  
Oakwood Worldwide

- **OASIS Account Management.** Enables you to build deep and satisfactory relationships with key accounts by providing a comprehensive history of all interactions your sales team or partner organizations have with customers. OASIS Account Management also helps you enhance long-term “replenishment-oriented” sales processes such as those in the chemicals, communications, consumer goods, energy, and financial services industries.
- **OASIS Quotes.** Helps you develop, verify, revise, and submit quotes tailored to customer requirements. By using detailed information from OASIS Opportunity Management, OASIS Quotes helps you automatically generate quotes, verify that they are complete and accurate, and identify opportunities for up-selling and cross-selling. You can print quotes in a variety of formats and use e-mail to send them to customers over the internet. When integrated with OASIS Encyclopedia, OASIS Quotes enables you to price products immediately and accurately from multiple price lists and in multiple currencies, taking into account volume discounts and complex pricing rules.
- **OASIS Pricer.** Lets you set consistent pricing across the organization, easing the burden and expense of manual price management while increasing corporate agility and enhancing customer satisfaction. By developing, managing, and deploying complex pricing rules, OASIS Pricer helps you implement specialized pricing by product, account, promotion, or other pricing criteria, ensuring easy adoption of new pricing models and quick responses to changing market conditions.
- **OASIS Configurator.** Enables you to enforce business rules while delivering context-based messages that facilitate up-selling and cross-selling. To provide the ideal solution for each customer at the optimal price, your sales team needs a comprehensive tool that ensures the accuracy, completeness, and validity of complex orders. By using OASIS Configurator internally, your sales team can improve productivity and order accuracy; by implementing it for external use on your company’s Web site, you can easily guide buyers through self- service product customization.
- **OASIS Proposals and OASIS Presentations.** Builds high-quality sales proposals and presentations tailored to customer requirements. Your ability to close sales often depends on creating customized proposals and making effective presentations to customers. Proposals created with OASIS Proposals can be viewed in Microsoft Word, IBM Lotus WordPro, or on a standard Web browser; presentations built with OASIS Presentations can be delivered in Microsoft PowerPoint or IBM Lotus Notes Freelance Graphics.

- **OASIS Collaboration.** Integrates Microsoft SharePoint with OASIS CRM applications, enabling users to create SharePoint sites—or “team spaces”—from within OASIS CRM to help them collaborate on opportunities. In addition to facilitating online discussions, OASIS Collaboration supports online presence indicators and document posting areas.
- **OASIS Calendar and OASIS Server Sync for MS Exchange Server.** Seamlessly integrates data stored in Microsoft Outlook and Exchange with other OASIS CRM applications. Whether your sales professionals are working with task lists, scheduling meetings, or acquiring new business contacts, integrating their sales automation tools with this popular desktop productivity software is essential. OASIS Server Sync for MS Exchange Server lets them easily synchronize OASIS Calendar with Microsoft Outlook and Exchange.
- **OASIS References.** Matches prospects with customer references, allowing you to close more deals more quickly. OASIS References helps you maintain a detailed profile of every customer reference. To prevent valuable references from being overused, you can track the number of times each customer reference is used and for what purpose.
- **OASIS Expense Reporting.** Lets you prepare expense reports at the click of a button, track reimbursement for all your expenses, and effortlessly handle complex currency conversions. By streamlining expense reporting, you can eliminate the time-consuming, error-prone, and frustrating nature of this task.
- **OASIS Messages.** Enables all the members of your sales team to enter messages directly into OASIS CRM applications and link those messages to accounts, opportunities, contacts, and service requests to produce a detailed record of all communications with customers and with each other.
- **OASIS Dun & Bradstreet.** Integrates public and private company information from Dun & Bradstreet. OASIS Dun & Bradstreet lets you do efficient prospecting and perform other sales research on companies—large and small—scattered around the globe. It integrates with Austin-Tetra solutions as well as with other third-party vendor products.
- **OASIS Assignment Manager.** Automatically routes opportunities, accounts, contacts, and activities to precisely the right sales team members—company employees as well as channel or business partners—based on flexible and configurable business rules.

### **OASIS Server Sync for MS Exchange Server**

- Integration with Microsoft Outlook and Exchange overcomes the challenge of making your CRM system transparent
- Interactions with CRM applications occur as part of your users' daily tasks
- A server-based synchronization engine synchronizes calendar appointments, contacts, employees, and tasks
- Access to Microsoft Outlook Calendar is provided from within OASIS CRM
- A Microsoft Outlook add-in enables users to link Outlook contacts, tasks, and appointments to OASIS CRM data, such as opportunities and service requests

## **OASIS Portfolio Management Process Key Benefits**

The Portfolio Management Process (PMP) is a structured methodology that enables sales professionals to assess their customer accounts and apply the right strategies to each one. OASIS PMP

- Provides a clear view of a portfolio's revenue potential
- Helps create a plan to prioritize investments and returns for strategic customers
- Creates a standard process for managing account portfolios that can be consistently applied across your sales organization
- Improves collaboration among the members of the "virtual" sales team
- Uses partner capabilities and resources across portfolios

- **OASIS Territory Manager.** Helps you keep your salespeople appropriately aligned with their respective territories. Because maintaining your sales force is a major cost for your organization, you want to make sure that your representatives are working efficiently and not competing with each other for customer accounts.
- **OASIS Target Account Selling (TAS).** The Target Account Selling sales methodology is an opportunity-based set of processes that helps sales professionals assess their opportunities, conduct organizational and competitive analyses, and develop and execute effective sales strategies. This structured and repeatable sales methodology enables the sales organization to build successful relationships with customers while shortening selling cycles and increasing sales revenue per employee. OASIS TAS quickly and easily helps sales professionals assess their opportunities and competitive position, develop strategies, identify customer milestones, and formulate and execute closing plans.
- **OASIS Enterprise Selling Process (ESP).** The Enterprise Selling Process methodology enables account teams to target, penetrate, and nurture large strategic accounts. By automating the account planning process and improving coordination across the account team, OASIS ESP helps sales professionals more-effectively execute strategic plans, develop new business opportunities, manage key executive and partner relationships, and coordinate team activities.
- **OASIS Portfolio Management Process (PMP).** The Portfolio Management Process methodology is a set of account-based management sales procedures designed to assist sales reps and managers alike in targeting accounts that promise to yield the highest return. The OASIS PMP structured sales methodology helps sales professionals meet or exceed revenue targets while protecting established account relationships from competitors.
- **OASIS CRM Assistant.** Helps sales reps present a consistent face to customers so they can proceed smoothly through the sales process and transform opportunities from prospect to close as swiftly and efficiently as possible. This coaching module supports popular sales methodologies and reinforces best practices.
- **OASIS Workflow.** Automates business processes within OASIS CRM. The intuitive graphical interface of this interactive software tool lets sales managers automate specific business policies and procedural tasks, improving sales effectiveness as well as improving customer service.

## Share Information On the Go with OASIS Mobile Sales

OASIS Mobile Sales applications support the increasing number of sales professionals who work outside their connected office environments. With the rich functionality of OASIS CRM applications—coupled with the convenience of a laptop, handheld, or wireless device—these applications deliver vital information that mobile professionals need, whenever, wherever, and however they need it. Because OASIS Mobile Sales applications provide the same user interface for mobile as well as connected modes, you can leverage your existing investments in enterprise applications, making them instantly available to thousands of remote users in a cost-effective manner.

### OASIS CRM Wireless

OASIS CRM Wireless helps your sales professionals stay on top of critical tasks such as managing calendars, reviewing account details, and updating opportunity or product order information. Easy to use from any mobile device equipped with a standard HTML, XHTML, or WML browser, OASIS CRM Wireless brings together wireless communications and the internet. It extends OASIS CRM's leading sales force automation functionality and content to enable your mobile salespeople to communicate seamlessly with customers, partners, and each other.

Additionally, OASIS CRM Wireless can be configured to support the markup languages of other wireless browser types and uses the same development toolset (OASIS Tools), logical data model, and set of business objects as all other OASIS customer relationship management (CRM) applications.

### OASIS Wireless Messaging

Using the OASIS Wireless Messaging option with OASIS CRM Wireless, sales professionals can ensure that relevant account and opportunity information is “pushed” to them in the field. Alerts are triggered automatically according to an organization's business rules and can be turned on or off by users or administrators through a mobile “alerts” view. This push feature, available for all OASIS Wireless applications, supports the standard Wireless Application Protocol (WAP) as well as other leading wireless protocols such as Short Message Service (SMS), Telocator Alphanumeric Protocol (TAP), and Simple Mail Transfer Protocol (SMTP) e-mail.

### OASIS Mobile Sales Key Benefits

Implementing OASIS Mobile Sales applications translates directly into lower costs, more-profitable and more-predictable revenue growth, and higher-quality customer interactions. Among other benefits, OASIS Mobile Sales lets you

- Enable sales professionals to choose the devices best suited to their needs
- Update enterprise databases on the fly, increasing the accuracy and timeliness of corporate data
- Improve sales reps' access to accurate, up-to-date business, customer, and product information any time, anywhere
- Lower sales operation costs through higher worker productivity and efficiency
- Increase customer satisfaction by providing relevant information in real time
- Improve IT operations by configuring business rules once and deploying them across multiple business platforms

### **OASIS CRM Handheld**

Moving beyond wireless capabilities, OASIS CRM Handheld provides mobile sales professionals with “always on” sales tools that let them manage opportunities, accounts, and contacts, whether or not they are connected to a network. Designed so that sales professionals can customize it for their particular business needs, OASIS CRM Handheld builds on best practices; operates on a broad range of Windows Mobile 5-powered devices from companies such as HP and Dell Inc.; and supports a wide spectrum of peripheral devices such as printers and scanners.

Additionally, OASIS CRM Handheld is optimized for ease of use and operation on small-screen devices and offers several configurable navigation options. Its powerful filtering technology lets your sales professionals download targeted subsets of data from the information repository in OASIS CRM applications, giving them considerable flexibility and control over the data and functionality they choose to access in the field.

### **OASIS Remote and OASIS Remote Web Client**

Used daily by thousands of mobile professionals worldwide, OASIS Remote is a fast and scalable synchronization solution that boosts the productivity of your remote workforce while safeguarding critical corporate information assets. Going a step beyond virtual private network (VPN)-based remote connectivity, OASIS Remote Web Client is a full-functioned, disconnected client supported by the OASIS Remote server-side software. Together, they provide your sales force with flexible, secure deployments of remote applications, such as those that run on the Tablet PC platform. These applications also support third-party store-and-forward wireless messaging applications.

OASIS Remote employs patented synchronization technology to keep local and enterprise databases in sync—with or without explicit user commands. This allows messages to be pushed to sales representatives for timely action. Your sales professionals have access to all enterprise customer data from their laptops or other mobile devices, and experience the same computing performance they expect when connected directly to the network.

## **Leverage Sales Knowledge with OASIS eBriefings**

OASIS eBriefings gives sales, marketing, and customer service professionals convenient access to the most-relevant and most-critical news and business information about accounts, competitors, opportunities, and current market trends. By ensuring that sales professionals always have the right information at the right time, OASIS eBriefings leverages knowledge across the organization, improving close ratios and shortening sales cycles.

- **Personalized briefings.** OASIS eBriefings aggregates critical business data and news within four types of briefing documents: account briefings, company briefings, competitor briefings, and a personalized home page called My Briefing. By drilling down into any of these documents, your sales professionals can get information from other OASIS CRM applications or access external Web-based content sources through embedded hyperlinks. Each briefing document is presented as a single Web page that your team members can customize based on their content, layout, and navigation preferences.
- **Customized tracking profile.** The tracking profile feature of OASIS eBriefings lets users control the type of information and news that appears in their personalized briefings, helping them focus only on information that is directly relevant to their responsibilities or interests. They can select specific accounts, companies, and competitors they want to track on an ongoing basis. OASIS data, market news, and other information closely linked to their preferences will appear on the respective briefing documents. Recommended links, Web clips, and marketing collateral can also be displayed by associating the literature with tracked accounts, competitors, products, and industries. By helping sales professionals customize the content of their briefings, OASIS eBriefings' tracking profile feature reduces information overload and increases the time that sales professionals spend with customers.
- **Seamless integration with external content.** OASIS eBriefings is preconfigured to integrate with OASIS eContent Services. Subscribers to OASIS eContent Services receive premium news and company information from multiple sources, including leading U.S. and international newswires, business magazines, newspapers, and trade journals. OASIS eBriefings can also be configured to integrate with other Web-based content sources.
- **Streamlined news topic selection.** OASIS eBriefings delivers a predefined set of search topics through OASIS eContent Services that enables your salespeople to receive current news of interest to them. They can search on headline news, local and regional news, industry news, and business subjects. Administrators can modify these topics or create additional ones.
- **Easy information sharing.** By aggregating information from multiple sources into a single application, OASIS eBriefings dramatically cuts research time. It also facilitates the sharing of actionable knowledge by letting users compile announcements, bulletins, Web clips, recommended links, and other content that can be sent to and accessed instantly by designated individuals and groups across the organization.
- **Trouble-free mobile synchronization.** With OASIS eBriefings, your sales professionals can synchronize their briefings for viewing while working remotely and be at their most productive while on the road. Web pages are downloaded to a temporary internet files folder so that the briefings are available even when working offline. OASIS eBriefings also lets your sales professionals synchronize external linked pages.

## Access the Right Information at the Right Time with OASIS Sales Analytics

“By providing a transparent view of the customer, OASIS helped DHL achieve an estimated 1 percent increase in revenue in 2005. These gains are derived from transforming the agility, efficiency, and effectiveness of companywide business processes.

“The [OASIS ] OASIS solution has also reduced the amount of time the sales force needs to spend on administrative activities, leaving them more time to devote to the customer. Marketing is equipped to deliver campaigns with the right message, to the right person, at the right moment in time.”

**Ulrik Topp**

Global Sales Development Director  
DHL

Enterprises depend on information to optimize performance. However, most organizations are hampered by information that is incomplete, out of date, or otherwise inadequate for answering critical business questions in a timely fashion. OASIS Sales Analytics is designed to help sales organizations leverage the power of timely, actionable information to improve the quality of decision-making.

By seeking out and aggregating information hidden in systems across the enterprise—including financial management, supply chain, and CRM applications—OASIS Sales Analytics provides sales professionals with the insight they need to take immediate and effective action. Not only do they get a complete and comprehensive picture of customer needs and buying patterns, but they can also immediately spot potential problems and identify opportunities to increase revenue, decrease costs, and enhance profitability.

### Provide Insight When and Where You Need It

To compete effectively in today’s marketplace, companies need to deliver the right information to the right person at the right time. OASIS Sales Analytics provides timely metrics, alerts, and reports that enable sales team members to take action based on facts rather than intuition. It can also proactively deliver insight to salespeople in the field via laptops, cell phones, or other mobile devices, ensuring that they always have the latest information for making informed decisions and increasing their close rates.

Even more important, because OASIS Sales Analytics is part of OASIS Business Intelligence applications, companies can easily combine data from sources across the enterprise to provide salespeople with complete views of their accounts. With OASIS Sales Analytics, companies can maximize the value of their customer relationships and improve the effectiveness of their sales organization.

### Increase Accuracy of Forecasts and Monitor Results

Sales executives need up-to-the-minute information for monitoring sales activities and accurately comparing their progress with sales goals. Moreover, measuring progress against past company experience can provide early insight into potential problems, enabling sales professionals to take proactive steps to get the opportunity back on track.

With OASIS Sales Analytics, sales executives can receive alerts when territory performance drops below weekly targets, enabling them to take appropriate action, such as coaching their sales representatives or assigning additional resources to a particular account. OASIS Sales Analytics also provides sales professionals with real-time insight into sales opportunities, including how long each opportunity has been in the pipeline and the current status of team selling efforts.

## Increase Sales Force Effectiveness

Sales managers need fact-based insight into the effectiveness of their sales representatives so they can provide the necessary coaching to improve performance. Additionally, a holistic view of pipeline opportunities enables better decision-making by helping sales representatives focus on the best opportunities. By providing best-practices metrics, OASIS Sales Analytics enables sales managers to identify strengths and weaknesses and address them at the individual level. It also provides managers with the ability to apply the same best practices throughout the sales organization.

## Improve Responsiveness

Whether in the office or in the field, your sales professionals need information from all functional areas of the company so they can respond quickly to customer issues and resolve them before they become problems. Your sales force may need to perform account and activity checks, review service requests, or determine the best products to up-sell and cross-sell. With OASIS Sales Analytics, sales professionals receive timely information that gives them a complete picture of each customer relationship, enabling them to take action to maintain account satisfaction.

## Maximize Resource Use

By understanding their pipelines, sales executives can identify critical opportunities and assign resources to maximize profitability rather than expending them on less promising activities. Although traditional sales reporting and analytics applications have typically focused solely on an organization's pipeline, OASIS Sales Analytics provides sales professionals with new levels of business insight into every aspect of the customer relationship. Using OASIS Sales Analytics in combination with OASIS Order Management and OASIS Fulfillment Analytics gives sales representatives access to actionable information from financial, billing, order management, and CRM systems to help them increase customer satisfaction, lower sales costs, and maximize revenue.

## Promote Faster Implementation

Providing actionable insight to the sales organization requires powerful analytic tools. However, most business intelligence solutions are costly, time-consuming to implement, and difficult to modify when business requirements change—as they invariably do.

OASIS Sales Analytics is an out-of-the-box solution designed for fast deployment at a dramatically reduced cost that involves minimal risk and provides better business results. By including prebuilt data models, more than 150 metrics, and best practices based on OASIS's experience across thousands of sales-force-automation implementations, OASIS Sales Analytics allows users to customize and extend the application without programming. The intuitive Web-based interface requires very little training, enabling rapid user adoption.

## OASIS Sales Analytics

### Key Benefits

Enables business users to

- Analyze pipeline opportunities to determine necessary actions for meeting sales targets
- Determine which products and customer segments generate the most revenue
- Understand which competitors you face most often and how to win against them
- Identify up-sell and cross-sell opportunities within existing accounts

Enables IT to

- Accelerate deployment of sales analytics to connected and remote users alike
- Reduce implementation cost and risk through integrated analytic solutions
- Integrate data from multiple enterprise sources across the company valuechain
- Flexibly adapt to changing business needs by leveraging, rather than replacing, existing technology investments
- Deliver better business results

“When you look out in the market today, you won’t find another solution that comes close to what OASIS CRM offers in the CRM space. We recognize that [OASIS ’s] OASIS reflects a thorough understanding of today’s best practices for sales, services, and marketing.”

**Steven Wright**

Vice President, Customer Relationship Management  
IBM

### **Tailor Reports and Dashboards**

OASIS Sales Analytics includes a prebuilt, fully configurable, and extensible data warehousing solution based on OASIS Business Analytics Warehouse, a comprehensive data repository optimized for analysis and tailored to industry-specific customer and business needs. OASIS Business Analytics Warehouse unifies all customer, sales, marketing, service, e-commerce, and product data across the enterprise and includes a high-performance extract, transform, and load (ETL) engine that transforms data from OASIS CRM applications and other internal and external sources into actionable intelligence. OASIS Sales Analytics also offers prebuilt data extractors that let companies directly extract and aggregate the vast amounts of corporate data stored in enterprise resource planning (ERP) systems and other applications.

### **Enable Scalable Intelligence**

OASIS Sales Analytics includes OASIS Business Intelligence Server, an advanced analytics platform that delivers unsurpassed scalability. By supporting thousands of users, huge data volumes, and multiple heterogeneous datasources at a significantly lower total cost of ownership than other solutions, OASIS Business Intelligence Server provides seamless access to information contained in relational, host, and XML-based systems.

Additionally, your organization receives timely, complete, and relevant intelligence from multiple datasources and systems—front-office, back-office, legacy, and e-commerce—while enjoying high performance. OASIS Business Intelligence Server also provides an open and fully extensible platform that lets you leverage existing investments in data warehouses and business intelligence tools.

### **Provide Self-Service Access**

OASIS Business Intelligence Answers complements OASIS Sales Analytics applications by giving your organization self-service access to interactive, proactive intelligence over multiple devices. With OASIS Business Intelligence Answers, any sales professional can easily get real-time answers to ad hoc business questions; analyze the results; create charts, pivot tables, and reports; and then save, organize, or share the results with team members or sales managers.

In addition, OASIS Business Intelligence Delivers ensures that the right information is delivered to the right person at the right time. OASIS Business Intelligence Delivers lets each of your sales team members create proactive analytic agents that automatically detect events of interest to them. The agents immediately notify the users (via Web, wireless, voice, or mobile device) when relevant information is available, and then deliver that data automatically to each user’s preferred device.

### **Collaborate Across the Organization**

All members of your extended enterprise—employees, customers, or partners—must collaboratively set goals, measure progress, and drive results. OASIS Sales Analytics delivers rich and immediately useful information to all stakeholders. With its intuitive interface and internet-based architecture, OASIS Sales Analytics can provide thousands of users with self-service access to up-to-the-minute analytics that are personalized and relevant and that incorporate data from multiple sources across the organization.

### **Measure Sales Effectiveness**

Your marketing and sales professionals need help to gain insight into product demand, pricing trends, and promotion effectiveness. OASIS Product Selling Effectiveness enables your organization to analyze information on all these topics (and more) across all channels, including the Web, call centers, field sales, and reseller partners. Empowered with this information, your sales and marketing professionals can fine-tune channel management, focus promotional and sales efforts on the most-profitable products, and identify the most-effective cross-sell and up-sell opportunities.

### **Provide Executive Monitoring**

Executives need ways to track the health of their department or company without having to monitor multiple datasources. Through consolidated views that include key metrics pertaining to marketing, sales, service, customers, and products, OASIS Sales Analytics provides executives with aggregated analytics dashboards that give them easy access to the information they need. Data used to populate dashboards can come from other CRM applications or from ERP or other legacy systems.

## **Unparalleled Ease of Use and Deployment**

Each OASIS CRM application can be accessed with a standard Web browser, reducing deployment costs while letting organizations provide in-depth information to partners, resellers, customers, and prospects via the Web. The application suite is available on all major computing platforms and accommodates mobile, connected, thin, and handheld clients. In addition, OASIS CRM supports major European and Asian languages, multiple currencies, and performs automatic currency conversions.

With a rich visual development environment and prebuilt support for seamless integration with leading middleware products, OASIS CRM satisfies even the most-rigorous requirements for application deployments. Its architectural flexibility enables organizations to configure once and deploy everywhere and its automated upgrades and remote software

distribution capabilities provide full lifecycle management at reduced expense. With many thousands of implementations at leading enterprises around the globe, OASIS 's OASIS CRM has delivered proven return on investment faster than ever before.