SIEBEL 7
eBusiness

GUIDE TO SIEBEL GLOBAL SERVICES

Technical Support
Education
Professional Services

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With experience in more than 3,500 CRM deployments, Siebel Global Services has developed a complete array of customizable professional services to support customer success through every phase of designing, deploying, and using Siebel *e*Business Applications. Siebel Global Services offerings allow organizations to:

- Validate CRM business objectives and business processes

- Rapidly deploy Siebel *e*Business Applications

- Train entire implementation teams

- Ensure high levels of user adoption

- Transfer best practices and methodologies to sales and partnering organizations

- Obtain fast, expert technical support

- Measure the overall success of eBusiness initiatives

This guide was developed to provide Siebel customers with information regarding the resources and support services available to help them successfully install and maintain their Siebel solution.

Revision History

Guide to Siebel Global Services has been substantially revised since the version published in July 2002.

Customer Reference Sheet

Important Phone Numbers and Email Addresses

Group	Phone Number	Email Address
Siebel Global Services	1-888-465-9755	SiebelGlobalServices@siebel.com
Siebel Technical Support	1-800-214-0400 or 650-341-0700	Support@siebel.com
Siebel University: Technical Training and User Adoption Services	North America +1-888-550-1831 Latin America +1-510-788-8845 EMEA +44 (0) 1784-494-564 Asia/Pac +44 (0) 1784-494-565 Japan +81-3-5464-7658	SiebelGlobalServices@siebel.com
Siebel Maintenance Renewals	1-888-465-9755	Renewals@siebel.com
Siebel *e*Business Applications Sales Support	1-800-366-5818	directresponse@siebel.com

Useful Siebel Web Sites

Web Site	URL
Siebel Corporate Home Page	www.siebel.com
Siebel Global Services	http://www.siebel.com/services
Siebel University	http://siebeluniversity.siebel.com
Siebel SupportWeb	http://ebusiness.siebel.com/supportweb/
Siebel Implementation Services	http://www.siebel.com/services/implementation
Siebel MultiChannel Effectiveness Services	http://www.siebel.com/services/multichannel
Siebel Technical Account Management	http://www.siebel.com/services/technical

Reducing Implementation Time and Cost with Siebel Professional Services

The extensive CRM experience of Siebel service professionals translates into faster, more problem-free software implementations at a lower total cost. Our proven professional services, delivered by expert consultants, allow our customers to bring new products and services to market faster while achieving their desired ROI.

Siebel consultants provide deep product knowledge and technical expertise, allowing customers to quickly and effectively install and optimize Siebel *e*Business Applications. Siebel consultants lead entire implementations, work closely with partner teams, or supplement the customer's own project teams to ensure CRM success.

Siebel Global Competencies Provide Industry and Product Expertise

The Siebel Global Competency Practices ensure that Siebel Professional Services maintains the highest-level of Siebel *e*Business Application expertise. Drawing from in-depth industry experience and deep technical expertise, the Competency practices define best practices for business process-based Siebel implementations. Specific areas of competency expertise include:

- Industry-specific competency practices

- Cross-industry competency practices

- Enterprise integration and supporting technologies practices

- Siebel implementation methods

Consultants from the Global Competency Practices are available to participate in customer engagements to contribute in-depth product expertise that addresses specific customer implementation challenges. The Global Competency Practices also develop and deliver best practices for Siebel *e*Business Applications, "reusable" tool kits, and other forms of intellectual capital to expand and facilitate the distribution of Siebel's in-depth knowledge of CRM processes and industry practices to our customers.

Service Offerings to Support Successful Siebel Implementations

Siebel Global Services offers a range of service offerings designed to use our expertise and support our customers during every phase of a Siebel *e*Business Application implementation – including solution planning, initial roll-out, testing, and upgrade.

Siebel ePlan Service

The Siebel *e*Plan Service provides a Solution Blueprint for turning an organization's eBusiness vision and strategy into reality. Siebel Certified Consultants work with customers to identify and analyze their needs through a series of workshops utilizing industry-specific Business Process models mapped to Siebel preconfigured functionality. Experienced Siebel Application Architects then craft recommended Siebel best-practice solutions to address identified gaps and satisfy unique business requirements. The resulting outcome is a clear implementation Strategy Roadmap that provides the outline for achieving short and long term objectives by identifying Quick Wins for fast return on investment, along with longer term solutions.

Siebel QuickStart Plus Services

Siebel QuickStart Plus services offer a series of focused workshops bundled with a technical training curriculum to facilitate a well-defined, accelerated project initiation that guides project success downstream. Drawing from product-specific best practices, Siebel Certified Consultants use tips and lessons learned in over 3,500 implementations to assist customers with a successful deployment of their purchased Siebel solution. The benefits of Siebel QuickStart Plus include:

- Mitigation of implementation project risks

- Project team focus on critical success factors and a successful project launch

- Knowledge transfer and training on product and industry-specific implementation best practices

- Facilitation of a smooth, timely and successful implementation

- Achievement of a speedier Return on Investment (ROI) and Return on Equity (ROE)

Siebel QuickStart Plus is ideally delivered prior to implementation planning to make sure organizations understand how to use the specific Siebel *e*Business application in their overall solution design.

Siebel Rapid Deployment Offerings

Siebel Rapid Deployment Offerings leverage best practice business processes to offer comprehensive, fixed-price service solutions that support customers in the rapid deployment of their Siebel solution. Key business benefits include:

- Rapid deployment of a specific Siebel Application

- Fixed-price implementation cost and timeframe to help you plan for and stay on budget

- Faster ROI through on-time project assurance, reduced total-cost of-ownership, and minimized risk

- Reduced implementation complexity by using preconfigured functionality, a proven methodology, and Siebel product expertise

- Increased user adoption through customized, end-user training

Siebel Rapid Deployment Offerings are available to support initial Siebel application implementations, the addition of enhanced Siebel functionality, and Siebel 7 Upgrades.

Siebel Test Services

Siebel Test Services draw from a defined methodology to help customers create a long-term test infrastructure for planning and executing application and system tests, and for conducting post-production tuning. Designed to mitigate project risks throughout the implementation lifecycle, Siebel Test Service offerings focus on three primary testing areas:

■ **Strategy** – Testing services designed to assist customers in planning a testing approach and defining the required tests to validate a Siebel *e*Business Application deployment.

■ **Performance** – This offering addresses critical customer concerns of performance and scalability, such as the impact of a varied number of end-users, volume of system transaction activity, network and hardware capacity, and configuration of Siebel *e*Business Applications.

■ **Functional** – Using an automated scripts process, the Functional Testing service identifies and tracks potential implementation errors, including the verification that the functionality meets end user business requirements and that response times are within the predefined thresholds.

Siebel Upgrade and Migration Services

Siebel Upgrade and Migration Services provide a variety of phased service solutions to help customers take advantage of new features that offer significant business benefits. Siebel Certified Consultants work with organizations to assess the migration effort, define the necessary upgrade tasks, identify the required resources, and determine production readiness. Siebel customers may also choose to have Siebel Global Services complete the Siebel application upgrade for them. Services are identified to meet specific company needs based on the capabilities of a customer's IT organization and her choice of a systems integrator.

Siebel eRoadmap Methodology Provides a Foundation for Implementation Success

All Siebel implementation service offerings are based on the Siebel *e*Roadmap Methodology – a phased project implementation methodology that provides the framework for implementing a successful CRM solution. Siebel consultants use the methodology to identify and address key strategic and tactical issues, and to develop a blueprint for the progress of the project. See Figure 1.
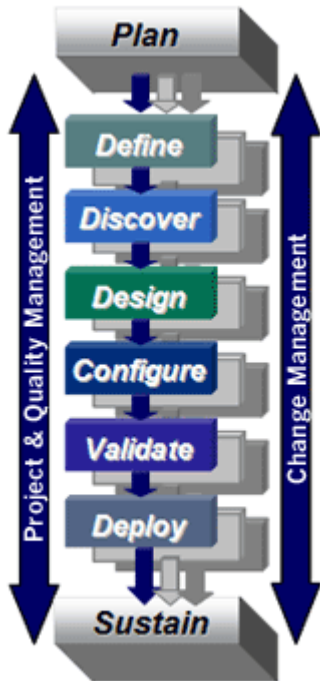
Figure 1. The Siebel eRoadmap

The Siebel eRoadmap prescribes eight stages of activities that are iterative in nature, allowing the implementation team to bring the system up in phases so the organization can quickly begin to take advantage of its benefits.

Frequently Asked Questions Regarding Siebel Implementation Services

■ How is Siebel Global Competency expertise engaged for my implementation?

The Siebel Practice Manager will recommend the appropriate the appropriate mix of Competency expertise and involvement to be included in planning for the engagement team.

■ How do I learn more about Siebel Global Services service offerings?

To learn more about the Siebel Global Services offerings, call Siebel Global Services at 1-888-465-9755 or email SiebelGlobalServices@siebel.com. You also can contact your Practice Manager to purchase any of the offerings for your organization.

Engaging Siebel Implementation Services

Call Siebel Global Services at 1-888-465-9755 or email SiebelGlobalServices@siebel.com.

Education Services 3

Ensuring 100 Percent User Adoption

No CRM deployment, no matter how well conceived, can succeed if an organization's employees do not adopt the software and learn to use it fully. Accordingly, Siebel Systems delivers a proven set of services that facilitate organizational change and train individual users to make optimal use of the Siebel software. As a result, customers can rest assured of the highest levels of user adoption essential for success.

Siebel User Adoption Services

Siebel Systems' best practices for supporting user adoption include developing an adoption strategy up front, implementing a communication plan, training end users, providing end user support, and aligning compensation and rewards to reinforce behaviors. Siebel Systems offers a comprehensive set of training and change-management services to meet these requirements:

Siebel Alignment Services

Siebel Alignment Services help align an organization's employees and management with the changes in strategy and the business processes required for CRM success. Siebel Alignment workshop programs are tailored to address the needs of employees at all levels – from executive management who must support the strategy while actively driving the process of organizational change, to the frontline sales, service, and marketing managers who must put the changes into action.

Communication Services

As part of the User Adoption Strategy, the Siebel University User Adoption team helps customers develop and deploy a communication strategy that furthers the organizational transformation by making sure the right messages are delivered to the right people, at the right time, through the most effective channels available.

End User Training

Siebel University provides customized curriculums and education delivery services, which include instructor-led training, train-the-trainer programs, and media-based solutions such as computer-based training, application simulations, and distance learning. Siebel University also offers skills-based training that is focused on the business-to-consumer markets and is designed for our customers' leadership, sales, and services personnel.

Measurement Services

Siebel University assists customers in establishing baseline metrics they can use post-deployment to assess user adoption rates. Following an implementation, Siebel University consultants will work with customers to conduct user surveys and workplace assessments, from which reported results can be compared to the baseline metrics. These results are then triangulated to determine the rate of adoption and to build plans for continued reinforcement of new user behaviors.

Support and Reinforcement

The Siebel University User Adoption team helps customers provide just-in-time support to their users through custom online help, a feature that is built directly into the Siebel application. Custom online help also helps management teams evaluate employee performance and identify areas that need additional reinforcement of new behaviors.

Frequently Asked Questions Regarding Siebel User Adoption Services

■ Can Siebel Systems provide a recommended strategy to ensure successful user adoption across all user groups within our organization?

Yes. *The Siebel User Adoption Strategic Plan* provides customers with a customized "blueprint" that defines activities, resources, and timeframes necessary to prepare the human infrastructure to meet the defined business objectives. This strategic plan helps customers allocate limited resources to those activities that will minimize user learning curves and assist the realization of business benefits resulting from use of the Siebel solution.

■ How can Siebel Systems help us prepare our entire organization for our CRM strategy and implementation project?

The *Siebel Getting Started Workshop (GSW)* ensures that business unit managers and project team members have a working knowledge of the purchased application features and functions, as well as possess the knowledge required to identify issues that may impact the Siebel implementation.

■ What services does Siebel Systems offer to help our executive team provide the leadership needed to drive the organization change associated with our CRM strategy?

The *Executive Alignment Workshop* offers a targeted approach for defining expectations and developing sponsorship needed at the senior level to initiate and drive organizational change. Executives learn about best practices derived from the experiences of other business leaders using Siebel technologies as well as examine the business imperative required to drive change in the company's sales and service strategy.

■ What services does Siebel Systems offer to help our management teams achieve our organization's business goals and drive user adoption of the new CRM system?

The *Management Alignment Workshop* helps organizations develop a targeted approach for communicating expectations from the executive level, and develop the sponsorship needed at the middle and frontline management levels to initiate and drive organizational change. This workshop also raises awareness and outlines action plans to maximize user adoption and increase the probability of achieving business objectives.

■ What online tool does Siebel Systems offer to help end users?

The Siebel University *Custom Online Help Tool* looks and behaves exactly like the Windows Help feature, but is client-specific. The content provided in the Help screens is based on real business processes and tasks taken from the client's customized GUIDE reference manual.

Engaging Siebel User Adoption Services

Call Siebel Global Services at 1-888-465-9755 or email SiebelGlobalServices@siebel.com.

Developing Technical Competence

Siebel Technical Training

Siebel University Technical Education offers courses that help implementation team members develop technical proficiency in areas specific to their individual roles, allowing them to successfully install, configure, and administer Siebel CRM applications. Siebel University courses are available onsite, through the Internet via the Siebel University Learning Portal, on CD-ROM, and in state-of-the-art learning centers around the globe.

Frequently Asked Questions Regarding Siebel University Technical Training

- Where can I find a catalog of Siebel University courses available?

  The Siebel University Learning Portal (http://siebeluniversity.siebel.com) provides a broad view of all the educational services Siebel University offers. It allows participants to determine a curriculum that meets their particular needs and enroll in instructor-led courses. The portal also provides access to Web-based and CD-ROM-based training designed to complement the instructor-led curriculum.

- What is the most cost-effective way to train a large implementation team?

  You may find it more cost-effective to have classes taught at your company site. Siebel University can arrange for instructors to travel to your site and teach a full curriculum. At least four weeks advanced notice is required to schedule onsite training.

- What type of Technology-enabled courses does Siebel University offer?

  CD-ROM and Web-based courses are available through the Siebel University Learning Portal. This rapidly expanding media-based curriculum includes technical and functional courses on Siebel industry and cross-industry products, as well as courses that prepare students to upgrade their Siebel eBusiness Applications.

  Individual Web-based courses are available online for up to 30 days of unlimited access per student. Customers also can participate in the cost-effective eSubscription program, which allows student access to all media titles for a period of one year.

  CD-ROM based courses are available with single-user licenses or with multiuser licenses that can be installed over an intranet.

- How do I register for a Siebel University course?

  First you must create a student profile on the Siebel University Learning Portal at http://siebeluniversity.siebel.com:

  1. From the Siebel University Home Page, click 'New User?' in the upper right corner of the page.

  2. Fill in the required fields, denoted with an asterisk "*".

3. Click Request Profile.

4. You will receive an email receipt, confirming that your profile has been created.

There are two primary methods participants can use to search for individual training courses or training products on the Siebel University Learning Portal – browsing and searching:

■ Browse Training

- Click the Browse Training link located in the left navigation menu.

- Select a browse category option and proceed through the browse path by clicking on the appropriate links.

■ Search for Training

- Click the Search by Training link located in the left navigation menu and select a search method:

Quick Search

♦ Search on a course name or a keyword.

♦ Enter the search criteria and click Search.

Advanced Search

♦ Detailed search using one or more search criteria.

♦ Enter the search criteria and click Search.

Once you have located your desired course, you may continue with the registration process:

1. Click View Schedule.

2. Select a start date and location.

3. Click Add to Order.

Engaging Siebel University Technical Training

Call Siebel Global Services at 1-888-465-9755 or email SiebelGlobalServices@siebel.com; or visit the Siebel University Portal http://siebeluniversity.siebel.com.

Siebel Certified Professional Program

The Siebel Professional Program establishes standards of technical excellence, making sure that Siebel Certified Consultants and Siebel Certified Business Analysts possess the requisite skills to successfully implement Siebel CRM solutions.

Frequently Asked Questions Regarding the Siebel Certified Professional Program

- How do I become Siebel Certified?

  Individuals must complete the required instructor-led training and pass an exam testing core knowledge of Siebel products to become Siebel certified. The training and exam are specific to the level of certification desired.

- What certifications are available for Siebel 7?

  There are five certification levels offered for Siebel 7:

  - Siebel Certified Consultant

  - Siebel Certified Business Analyst

  - Siebel Customer Certified Consultant

  - Siebel Certified Instructor

  - Siebel Customer Certified Business Analyst

Additional Information on the Siebel Certified Professional Program

Visit the Siebel University Portal at http://siebeluniversity.siebel.com or contact professionalcertification@siebel.com.

Improving Sales Effectiveness

Siebel MultiChannel Services (MCS) helps organizations improve overall sales effectiveness through the deployment of leading-edge sales, planning, and partner methodologies. Customers ultimately benefit through improved win ratios, reduced sales costs, increased customer satisfaction, and predictable revenue streams.

Target Account Selling (TAS)

The TAS Methodology enables organizations to qualify and manage opportunities from pipeline to closure, identify key decision makers, and determine customers' budgets and compelling events.

Enterprise Selling Process (ESP)

The ESP methodology allows collaboration across multiple salespeople and teams to allow organizations to penetrate, cover, and grow large strategic accounts – especially global accounts.

Channel and Alliances Management Process (CHAMP)

CHAMP helps alliance managers create predictable streams of revenue with strategic alliance partners by providing them with the methods and tools necessary for going to market with partners.

Frequently Asked Questions Regarding Siebel MultiChannel Services

- What are the primary benefits of a MCS sales effectiveness deployment?

    - More opportunities in the pipeline

    - Higher win rates

    - More consistent forecasting and interaction among sales teams

    - Higher revenues and lower operating costs

    - Higher customer satisfaction and retention

- How are the MCS sales methodologies and tools supported by Siebel software?

    Siebel has fully embedded the TAS, ESP, and CHAMP methodologies into the Siebel Sales and Partner Management products. The TAS and ESP methodologies and tools can be added to Siebel Sales as an optional module, while CHAMP methodologies and tools are designed into the Partner Management offering.

- How are MCS programs delivered?

    MCS programs are delivered by highly-trained, fully-certified instructors that have significant professional experience in sales and alliances organizations. MCS instructors are trained to deliver MCS programs

worldwide in a variety of languages in order to meet the sales effectiveness needs of companies around the globe.

■ Are there multiple delivery options for MCS programs?

MCS has created blended-learning versions of its most popular methodologies: TAS and ESP. This delivery option allows customers to reduce the amount of time their sales people are out of the field by offering much of the initial training and background work over the Web with an interactive elearning tool.

■ Does MCS provide training solutions for both small and large companies?

MCS has the ability to deliver sales effectiveness solutions to companies with one sales person all the way up to companies that have thousands of individuals in their sales organizations. MCS maintains an Open Sessions program that allows small sales organizations to send only a few individuals to a specific class, as well as private programs that accommodate classes for groups of 16 to 24 individuals within the same company.

■ How is the success of a MCS sales effectiveness implementation measured?

Siebel MultiChannel Services offers Sales Effectiveness eSurveys to measure user adoption rates of a new methodology and to determine the overall effectiveness of the MCS deployment.

Engaging Siebel MultiChannel Services

Call Siebel Global Services at 1-888-465-9755 or email SiebelGlobalServices@siebel.com

Leveraging Siebel End-to-End Customer Care

Siebel Systems end-to-end customer care begins before a sale is made and continues through implementation and deployment, until the customer has achieved measurable business value from the use of Siebel *e*Business Applications. Proactive advisors, executive sponsorship, and rigorous management of customer satisfaction are key elements of our customer-care process. The job is not done when the software is sold. Instead, Siebel Systems tightly couples the salesperson and service team to drive the implementation forward, from understanding the customer's business needs to ensuring business success in realized return on investment. See Figure 2.
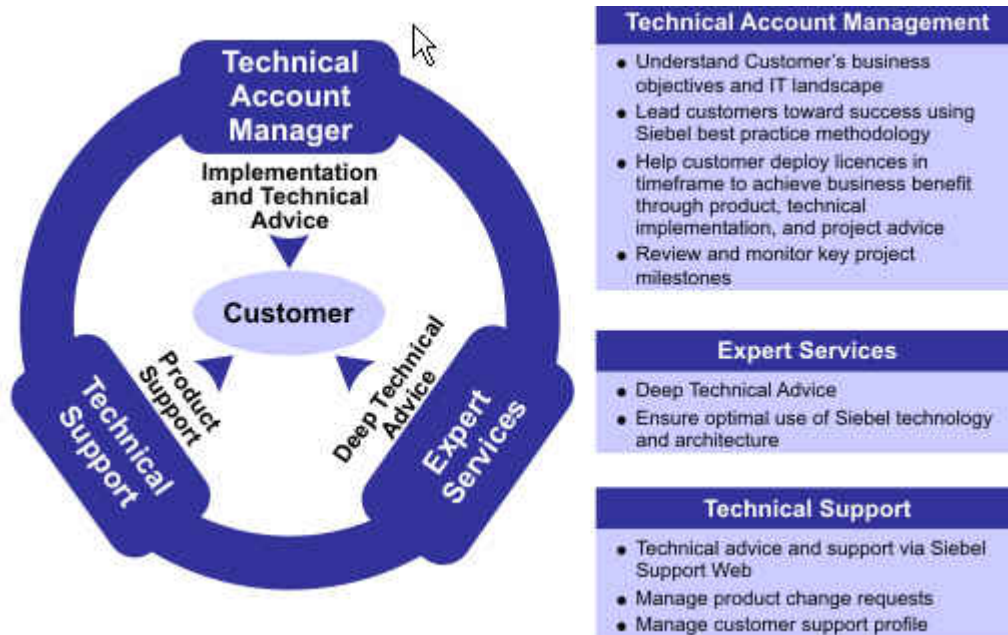

Figure 2. Siebel Customer Care Model

Technical Account Management and Expert Services

Technical Account Manager (TAM)

The Siebel Technical Account Manager (TAM) serves as the customer's lead implementation advisor through all phases of a Siebel deployment. Siebel Systems domain expertise encompasses the full spectrum of best

practices that lead to CRM success. TAMs leverage these best practices to provide guidance and knowledge transfer, helping Siebel customers accelerate implementation times, reduce risk, and realize long-term success.

Monitoring Progress to Advance Business Objectives

TAMs use a series of strategic and technical reviews to monitor and measure the success of a deployment during and after implementation. Action plans are then developed and executed to address issues identified during the reviews.

Minimizing Risk, Keeping the Project on Track

A Siebel TAM is experienced in all aspects of CRM implementations, including project planning, end-user requirements definition, technology, training, testing, and rollout strategies. TAMs use this knowledge to provide proactive and targeted advice, helping customers deploy on time, on budget, and with minimal risk.

Teaming with Alliance Partners to Lower Cost of Ownership

TAMs also work closely with Siebel alliance partners to share expertise and make sure that the customer benefits from the collective knowledge and full value of the combined project team. In this collaborative role, TAMs make sure project teams use the rich functionality and industry expertise inherent in Siebel applications, which can reduce total cost of ownership, shorten the implementation timeframe, and assist with user adoption of the new system.

Customer Account Management (CAM)

The Siebel Customer Account Manager (CAM) is appropriate for those organizations that are looking for a cost-effective way to supplement their project team with a Siebel resource but don't require the support of a Siebel TAM. A CAM's involvement is on average 1-2 days per week. While the customer continues to have access to Technical Support for reactive, incident-based support needs, the CAM serves as a proactive resource with whom a Siebel customer can work to escalate and resolve issues.

Siebel Expert Services

TAMs draw on their broad experience in all aspects of CRM design, development, and deployment to use experts within the Siebel organization who can help mitigate risk as well as ensure business success. In particular, Siebel TAMs work in conjunction with Siebel Expert Services (ES) — a team of highly skilled technical specialists providing deep technical expertise and technical QA — to support the deployment of optimal technology solutions that meet a customer's unique business needs.

To make sure that a customer implementation is on track and on time, Siebel Expert Services provides pragmatic solutions to specific and highly complex technical challenges. Siebel Expert Services offerings include:

■ **Proactive Technical Workshops** –Provide direction to best utilize technologies for a customers specific business requirements and IT environment

■ **Technical Reviews** – Identify technical issues before key milestones. Provide clear and achievable recommendations to address issues

■ **Specialist Assistance and Troubleshooting** – Provide assistance to implement specific and complex technical requirements. Troubleshoot architecture and configuration issues

Siebel Expert Services has helped thousands of customers successfully deploy Siebel technology. This experience, coupled with a direct relationship with Siebel engineering, makes sure customers receive rapid and precise advice on how to optimize Siebel technology for their own business needs and IT environment.

TAM/Expert Services Packages

Siebel Technical Account Management and Siebel Expert Services are available in the form of prepaid packages. These packages are highly flexible and have been tailored to support the needs of large, medium, and small customers. Each package has a common goal: To ensure 100 percent customer satisfaction and success. Your Siebel Practice Manager can help determine which package is most appropriate for your organization:

■ The *200 Day Package* offers the highest level of Technical Account Management and Expert Services support. This Package is ideal for very large, multiphase, multi-project engagements with a large number of complex business and integration requirements. Expected duration covered by the package is 1 year, assuming a weekly engagement level of 2–4 days from TAM and Expert Services.

■ The *100 Day Package* offers a high level of Technical Account Management involvement and a significant number of Expert Services days. This package is designed for customers conducting a large enterprise implementation that consists of a multi-project or multiphase environment. The package also assumes that customers will have an average number of business and integration requirements. The package covers an expected duration of 6 months assuming a weekly engagement level of 2–4 days from TAM and Expert Services.

■ The *50 Day Package* provides a basic level of Technical Account Management or Expert Services support. This package is recommended for customers who have a single phase, single site implementation with a small number of business and integration requirements. The package covers expected project duration of 5 months assuming a weekly engagement level of 2–3 days from TAM and Expert Services.

■ The **30 Day Package** offers limited Technical Account Management assistance or Expert Services days. This package is ideal for customers who have a Siebel Professional Services led implementation team who require Expert Services technical reviews and a limited number of days for specialist technical consultancy. Alternatively this package is also suitable for ongoing assistance and optimization of a customer's production environment.

CAM/Expert Services Packages

There are two 6-month offerings and one 12-month offering:

■ The *6-month CAM Package* includes CAM involvement for up to six months.

■ The *6-month CAM/Expert Services Package* includes CAM involvement for up to 6 months and a limited set of Expert Services reviews.

■ The *12-month CAM/Expert Services Package* includes CAM involvement for up to 6 months and a limited set of Expert Services reviews.

Frequently Asked Questions Regarding Siebel Technical Account Management and Siebel Expert Services

■ What is the main role of a TAM?

The TAM role can be broken into three key components: Strategic Implementation Advisor, Customer Advocate, and Project Technical Advisor.

Strategic Implementation Advisor—Through a series of structured workshops, assessments, and written deliverables, the TAM provides leading practices guidance and strategic advice to help customers optimize the Siebel eBusiness Applications functionality in their implementation, as well as align the implementation approach to meet the ROI goals of the project.

Customer Advocate—The TAM is ultimately responsible for making sure Siebel eBusiness Application implementation is a success. The TAM acts on behalf of the customer to request enhancements to Siebel eBusiness Application functionality and escalate critical requests to senior Siebel management. Through regular reports, the TAM makes sure that Siebel Systems' management is always aware of the customer's implementation progress.

Project Technical Advisor—The TAM draws from experience gained through thousands of Siebel projects to assist with the proper management of a Siebel implementation. The TAM conducts project and risk planning sessions with the blended project management team—which typically includes both customer and system integrator team members—to ensure the likelihood of project success. These planning sessions address such topics as project planning; scheduling; resource requirements; and end-user requirements definition, including testing, rollout, training strategies, and tools. TAMs also use existing Siebel knowledge surrounding technical issues, including design, configuration, data interfaces, and technical architecture to identify and resolve issues before they become critical and threaten project success.

■ How do we find out who our TAM is?

To determine who your TAM is, contact your Siebel District Manager (Sales), call Siebel Global Services at 1-888-465-9755, or email SiebelGlobalServices@siebel.com The TAM will then work with you to contract on a TAM Package.

■ How do Siebel customers make the best use of their TAM package?

The best way to maximize the benefits from your TAM investment is to make sure that your TAM is engaged proactively and constantly in all aspects of your Siebel implementation. There is little value in having a reactive TAM engagement.

Initially the TAM will work with your team to determine:

- An engagement schedule so you know when you should expect to see your TAM onsite and how to contact him

- Escalation procedures

- Defined deliverables and milestone planning

- An Expert Services review plan

■ What level of TAM and Expert Services involvement can we expect after purchasing a package?

The level of TAM and Expert Services resources deployed will vary depending upon the complexity of a project, number of end users, custom and standard business requirements, experience of the system integrator and IT staff, and the nature of assistance required (business, strategic, technical guidance).

At a minimum, customers can expect a TAM to be involved 2 days a week to provide strategic implementation and technical advice. The TAM also will conduct the strategic implementation reviews as part of Siebel's best practice implementation methodology, including a kickoff workshop, initial and monthly assessments, an implementation readiness review, and an implementation effectiveness diagnostic. In addition, a customer can expect the minimum set of recommended technical reviews from expert services (Sizing Review, Design review, Configuration and Script Review, Production Readiness Review, Production Health Check).

For more complex implementations, a customer can expect a greater level of involvement from a TAM and Expert Services. In some instances where there are large, multiple projects or phases with complex requirements, there may be multiple TAM and Expert Services resources on a team, coordinated by a senior TAM. Expert Services are also available to provide other specific reviews and workshops, and provide deep technical advice on a regular (that is, 1–2 day or week) or as-needed basis.

■ What are the TAM reviews and how can they help my organization ensure a successful implementation?

TAMs use a series of strategic and technical reviews to monitor and measure the success of a deployment during and after implementation. These reviews allow customers to understand the assessment of their implementation compared to Siebel's best practices. Most importantly, action plans are developed and executed to address issues. The TAM reviews are shown in Table 1.

Table 1. TAM Reviews

Review	Details and Deliverables
Kick-off Workshop	■ Covers best practices for CRM successes; key areas covered are implementation strategy, governance, user adoption, process, and technology. ■ Prepares the team for key aspects of the implementation. ■ Includes Best Practice handouts and written follow-up actions. ■ Confirms key business goals for the implementation including expected benefits. ■ Confirms key contacts from Siebel and customer involved in the implementation, including TAM involvement and interaction. ■ Delivers a Siebel *e*Plan presentation to project managers. ■ Establishes configuration and architecture guidelines for technical team.
Initial Siebel Assessment	■ Conducts Initial scored assessment against Siebel's best practices, including Strategy, Governance, User Adoption, Process, and Technology. ■ Measures customer's current plans against Siebel recommended practices. ■ Establishes baselines for deployment and business goals. ■ Includes a written report with scored assessments.

	■ Completes a milestone plan to track deployment of user licenses purchased across one or more projects.
	■ Reviews the phased implementation plan aligned with key business goals and suggested metrics to track.
	■ Reviews technical environment.
	■ Shares risks and recommendations with the executive sponsors.
	■ Delivers a presentation to project sponsors with follow-up action planning.
Monthly Assessment Review	■ Conducts a monthly scored assessment across strategy, governance, user adoption, process, and technology, including key recommendations.
	■ Measures progress of deployment and achievements of ROI.
	■ Identifies any risks and issues affecting deployment.
	■ Makes sure key recommendations are followed up.
	■ Provides measured assessment of Siebel repository to avoid over configuration of the application.
Implementation Readiness Review	■ Conducts a comprehensive review of the implementation project against Siebel best practices.
	■ Ensures business and IT team are ready for deployment of Siebel.
	■ Delivers a presentation to sponsor on key findings and action planning workshop.
	■ Involves interviews with key business users, IT users, and integration partner resources.
	■ Includes a written report and presentation to business and IT stakeholders on steps which are recommended before rollout commences.
	■ Provides a follow up action planning workshop to prioritize and assign the recommendations.
Implementation Effectiveness Diagnostic	■ Conducts a survey of end users to assess the success of the implementation from the user's viewpoint and identify areas for improvement.
	■ Leverages assistance from the Siebel Customer Satisfaction Team .
	■ Includes a written report with graphical analysis of end users' satisfaction with the system and suggested improvements.
	■ Provides benchmarks showing results compared with other Siebel customers carried out by the TAM in conjunction with the Siebel Customer Satisfaction Team.

■ What are the differences between a Customer Account Manager (CAM) and a Technical Account Manager (TAM)?

While both the CAM and the TAM are implementation resources, the TAM is a more experienced individual who will spend more time (and on-site) with fewer accounts. In addition, the following differences exist between the two resources:

- The CAM service is an annual service, paid for along with the maintenance agreement.

- The CAM service is a remote relationship, primarily conducted through telephone and email.

- A CAM will manage approximately 10 accounts simultaneously, rather than 3 accounts for a TAM.

The CAM service is most appropriate for companies looking for a cost-effective way to supplement their project team with a Siebel Systems resource, but who do not want to invest in a TAM who serves as a very technical, on-site resource and is intensely focused on a few accounts.

■ Why are TAM rates higher than normal Siebel consulting rates?

TAM packages are priced based on the value provided. TAMs serve as leveraged project resources that provide best practices guidance, proactive issue management, and risk mitigation. A TAM possesses the combined knowledge of your specific project objectives, implementation best practices, and in-depth Siebel experience, and is available to quickly resolve project issues or provide answers to detailed architecture, configuration, or functional questions. A TAM package will quickly pay for itself in allowing your team and system integrator to remain on track with the project plan.

■ How do TAMs work with system integrators?

The TAM organization has worked closely with many of our system integrators. TAMs supplement the excellent configuration and project management skills of a system integrator team with detailed knowledge of best practices gathered over 3,500 implementations. In addition, the TAM provides critical access to Siebel Product Marketing, Expert Services, Technical Support, Engineering, Quality Assurance and Executive Management.

■ What is the difference between a TAM and Standard Maintenance and Support?

Maintenance and Support provides access to Web-based technical support and entitles you to maintenance releases and upgrades. Technical Support provides assistance with *break* or *fix* type issues and questions. TAMs provide guidance on best practices and recommended approaches, as well as advice about Siebel technology and user effectiveness.

■ How does our organization engage Expert Services if we don't have a TAM package?

Please contact your Siebel Practice Manager or designated Siebel Support Contact.

■ How does the expertise offered by Expert Services differ from that of the Siebel Global Competencies?

Expert Services resources provide proactive reviews at specified intervals of the project lifecycle and focus on a specific area within a project phase, such as Architecture (Discover phase) or Code Review (Configuration phase). Expert Services also provides customers with a complete report of its findings and recommendations for tracking and follow-up purposes.

The Siebel Competency Services are made up of TAM and Professional Services resources, who are competent in either an industry vertical or product. The Competency teams typically have extensive, real-

world experience in their competency area, and their day-to-day job roles are much broader than those of Expert Services.

■ What specific expertise does Expert Services provide?

Expert Services can help project teams deploy the correct technology strategy to meet specific technology and business needs. Highly knowledgeable and experienced specialists advise and assist Siebel customers with key technology issues—before and after projects go live. Some of the key areas in which Expert Services can assist customers include:

- Advice on using standard functionality to minimize customization

- Design and implementation of complex functional requirements

- Architecture and deployment strategy

- Integration and workflow strategy

- Backup and recovery strategy

- Optimization of data loads

- Security and optimization of network performance

- High availability architecture implementation

- Minimization of upgrade windows

- Global Deployment and Unicode migration

- Ongoing optimization of production environments

■ Is there a minimum set of Expert Services reviews recommended?

Yes. At a minimum, every project should conduct the following:

- Sizing Review

- Design Review

- Configuration and Code Review

- Production Readiness Review

- Production Health Check

Please contact your TAM or visit http://www.siebel.com/services/expert for more details.

■ What are the specific product areas in which Expert Services has workshops, reviews, and expertise?

Expert Services provides services and expertise in key areas including;

- Performance Tuning

- Configuration and Design through Siebel Tools

- Communications Server and Smartscript

- Architecture Sizing and Topology

- Security and Access Control

- Unicode and Global Deployment

- UAN, EAI, and Workflow Manager

- Siebel Remote and Assignment Manager

- Wireless and Handheld

- ISS and Order Management

- Analytics and Marketing

- Upgrades

■ Where can I find detailed information regarding Expert Services workshops, reviews, and other services?

Please ask your TAM or visit http://www.siebel.com/services/expert/reviewmatrix to determine the appropriate workshops or reviews for your project.

Engaging Siebel Technical Account Management and Expert Services

Call Siebel Global Services at 1-888-465-9755 or email SiebelGlobalServices@siebel.com.

Siebel Technical Support

Ongoing maintenance and support of the Siebel deployment contributes to the business success throughout the lifetime of a CRM solution. Siebel Technical Support provides responsive and accurate resolution of service requests through the Internet, email, and telephone. Depending on their needs, customers can choose between support packages providing business-hour support or 24x7 coverage for resolution of critical issues.

- **Global Reach**—Siebel Systems maintains 12 support centers around the world to serve customers anywhere, any time. Multiple-region support allows global customers to establish designated contacts around the world to receive support in all time zones.

- **Web-based Support**—All Siebel Technical Support offerings include online access to SupportWeb, through which customers and partners can easily create, track, and update service requests as well as track change requests and search an extensive knowledge base of solutions and documentation.

- **Rollout Support**—The Rollout Support and Gold Support options reduce implementation time and cost by providing 24x7 coverage during the critical implementation and upgrade periods.

Siebel Technical Support expects your application to become a mission-critical tool in your daily business activities. Therefore, promptly dealing with any issues that arise in your use of the product is its top priority. In order to provide fast, up-to-date technical support, and to equip you with the most comprehensive access to the information you need, Siebel Technical Support uses the Web as its primary support delivery vehicle. The following sections and FAQs detail how you can work with Siebel Technical Support to resolve product issues. For additional information on how you can get the most out of Siebel Technical Support, please view the one hour *Using Technical Support* media-based training (MBT) course available through Siebel University (http://siebeluniversity.siebel.com). The course is free for all Siebel customers.

NOTE: Support hours, service request severity levels and response guidelines, delivery of updates, and so on are as stated in your Software License and Services Agreement (SLSA). Information in this guide does not replace or change your SLSA.

Frequently Asked Questions Regarding Siebel Technical Support

Accessing Technical Support Through Designated Contacts

- Who can access Technical Support?

  Siebel Technical Support provides assistance to your organization through Designated Contacts. Technical Support works with these contacts primarily by email and through Service Requests in Siebel SupportWeb, Siebel Systems' technical Web service. In order to initiate the support process, your organization must identify your Designated Contacts and notify support@siebel.com. A Technical Support account will be established for qualified, Siebel-trained Designated Contacts, providing access to Siebel SupportWeb. Issues will be channeled and resolved through your Designated Contacts using SupportWeb.

  Your company may appoint as many Designated Contacts as specified in your Siebel Systems agreement. You also have the option to purchase additional Designated Contacts. Please contact your Maintenance

Renewals Representative at Renewals@siebel.com to request further information. For continuity, you should retain the same people as your contacts for at least 90 days, unless they leave the company.

■ How does one become a Designated Contact?

To become a Designated Contact, your appointed employee must attend Siebel training as specified in your agreement. For information on Siebel courses, please see Siebel University (http://siebeluniversity.siebel.com). The two courses that qualify a supported customer or partner to become a designated contact are: Siebel Essentials or the Core Consultant Course. Once training has been completed, please email a request to establish your employee as a Designated Contact to support@siebel.com and copy your Technical Account Manager (TAM) or Customer Account Manager (CAM), if you have one. Please include the following information in your email:

- Name and title of designated contact

- Company

- Work email address

- Work phone number

- Dates and training classes attended at Siebel University

■ Is there an option to purchase additional Designated Contacts?

Yes, you also have the option to purchase additional Designated Contacts. If you are interested in this support option, please contact Maintenance Renewals at Renewals@siebel.com for further information. Please note that it is the responsibility of the Designated Contacts, the Technical Account Manager (TAM), or the Customer Account Manager (CAM)—if you have a TAM or CAM—to provide up-to-date contact, system profile, and address information. It is in your best interest to keep this information current at all times, as it is used for providing technical support, product updates, and proactive weekly notification of new SupportWeb content.

■ How long does it take to obtain a SupportWeb account?

After the previously described process occurs, a technical support account will be set up and a SupportWeb username and password will be sent by email to your contact. Please allow one business day once all required information is received to complete this process. If difficulties arise, this process may take longer, however those are exceptional cases.

■ Can other project team members gain access to SupportWeb?

Siebel Support Services will also establish one read-only SupportWeb account to be shared by your project team. The read-only account provides access to the technical support knowledge base and read access to your company's service requests, change requests, maintenance release requests, and designated contacts within SupportWeb. Only Designated Contacts are able to log and update Service Requests.

■ Is our organization contacted by Siebel Technical Support after we purchase Siebel software?

To provide a smooth working relationship, your new Designated Contacts will receive welcome calls from the Siebel Support Services group. The purpose of these calls is to welcome new Siebel customers, explain how Siebel Technical Support works, provide Web account information, and walk contacts through Siebel SupportWeb.

Tracking Service Requests

■ How are my issues reported, resolved, and tracked?

Siebel Systems will maintain records or Service Requests of all customer-reported issues, the steps to resolve them, and the resolution. A history of customer support interactions is available to users in their SupportWeb account.

■ How do I review my Service Requests?

To review your Service Requests, please access Siebel SupportWeb, in which you can submit, track, and update your Service Requests and track the Service Requests that other users at your company have submitted.

■ Is there a problem and resolution repository that is accessible?

In SupportWeb, users are able to view issues submitted by other customers and their solutions in order to aid in problem resolution. These knowledge base items are available by using the Support Search feature. Please note that while many technical issues logged through Siebel SupportWeb are made available to all customers through Support Search, customer contact information is kept confidential.

■ What are the guidelines for issue resolution?

Technical support and engineering resources will be assigned in accordance with the severity of the problem being encountered. Severity levels are defined in your SLSA, on Siebel SupportWeb in the "Using Technical Support" section and in this document in the "Assigning Severity Level to Service Requests" section. Resolution of a customer's problem will depend, in some cases, on the ability of your Designated Contacts to provide accurate and detailed information and to conduct diagnostic and test activities as requested by Siebel support personnel. Please be prepared to devote resources to working with Siebel Technical Support to resolve technical issues.

Accessing Siebel SupportWeb

■ What is SupportWeb?

Siebel SupportWeb is a technical online resource to provide users with a comprehensive repository of product information and solutions, and with the ability to interact with Siebel Technical Support. Supported users can access SupportWeb directly at http://ebusiness.siebel.com/supportweb. Full access accounts are provided to Designated Support Contacts. A read-only logon account also is provided for your entire project team.

Siebel Technical Support provides around-the-clock access to information and answers through SupportWeb. The Web site contains answers to common support issues raised by Siebel customers and proactive product information. This should be the first place you look for solutions to your problems. SupportWeb also provides you with the ability to submit and track your Service Requests, as well as track the status of your Change Requests, Maintenance Release Requests, System Profile, and support agreement.

■ What are the main areas of SupportWeb?

See Table 2 to review how SupportWeb can help you find Siebel product information, report issues to Siebel technical support engineers, and learn from other Siebel users.

Table 2. Level 1: Siebel SupportWeb Areas

Area	Description
Using Technical Support	This area of SupportWeb contains detailed information on working with Technical Support, such as how to report a problem, severity level definitions, and escalation procedures. The Using Technical Support section is also available on SupportWeb in French, German, Spanish, Brazilian Portuguese, and Japanese.
Support Search	This tool allows you to quickly and easily find information on specific topics by querying on keywords across Service Requests, Technical Notes, FAQs, Troubleshooting Steps, Siebel Alerts and the Siebel Bookshelf. Siebel Technical Support recommends that you use Support Search as your first step in diagnosing an issue.
FAQs (Frequently Asked Questions)	FAQs are a comprehensive collection of brief questions and answers from previous Support interactions.
Technical Notes	These notes document current information about specific topics related to the implementation, configuration, and usage of Siebel *e*Business Applications. Technical notes typically are detailed documents written by Expert Services, Product Marketing, or Technical Support Engineers.
Siebel Alerts	Siebel Alerts point out key product behavior and important change requests, and are usually of a more time-critical nature than the other types of content in the knowledge base. An alert typically will include a recommended action, such as a workaround or application of a maintenance release.
Troubleshooting Steps	Siebel Troubleshooting Steps address how to troubleshoot common error messages and unwanted behavior in Siebel Applications. The steps include a description of the behavior or error message, the cause of the behavior, the steps to diagnose the behavior, and the steps to resolve it.
Statements of Direction	A Siebel Statement of Direction presents new and enhanced features planned for upcoming releases of Siebel *e*Business Applications. Please note that all information contained in a Statement of Direction is prerelease and is subject to change.
Maintenance Release Guides	Maintenance Release Guides allow users to view the fixes included in the maintenance release and determine whether the maintenance release would be beneficial to their particular environment. Installation instructions are included as well.
Installation and Release Documentation/Supported Platforms	This area of SupportWeb provides easy and convenient access to documentation that will help you install or upgrade your Siebel *e*Business Applications. You will find Installation Guides, Release Notes, Upgrade Guides, and the System Requirements and Supported Platforms documents in this section.
Siebel Bookshelf	The latest Siebel Bookshelf version for each major software release is posted on SupportWeb and updated regularly so customers always have access to the latest Siebel product documentation.

Area	Description
Online Help Files/Help Development Kits	Source files and instructions for the Siebel eBusiness Application online help, which enable customers to customize the online help system for their Siebel deployment.
Documentation Updates	Documentation Updates, which began with the Siebel 99 release, cover changes that have been made to guides between revisions of the Siebel Bookshelf. This allows you to get the most current documentation immediately.
Siebel Support Times	This quarterly newsletter includes information on new services, features, and content in SupportWeb, and other major support events or changes that affect users. Periodically, the newsletter also highlights services available from Expert Services and Siebel University.
My Service Requests	Allows you to see all Service Requests you have submitted, drill down into the details, and update your Service Requests online, including adding attachments. Technical Support engineers communicate with Designated Contacts through Service Request updates, among other channels.
My Company's Service Requests	Provides the ability to see all Service Requests logged by your company (in addition to your own). You can see their status, drill down into the details, and update the Service Requests online.
Submit a Service Request	If unable to find the answer to your question in the Siebel SupportWeb knowledge base, you can log a new Service Request online simply and quickly.
Implementation Projects & System Profiles	Allows users to establish a project and related system profiles to reflect the various environments they maintain and the associated Siebel and third-party information. System Profiles are extremely valuable as the information is used in resolving Service Requests and to notify customers of new relevant content.
My Company's Support Agreement	Users are able to view their support level, support start and end dates, designated contact allocation, and their FTP account credentials.
My Company's License Keys	Users are able to view their company's recent license keys and the applicable information for those keys.
Update Profile	Maintain your contact information so Siebel Technical Support always can reach you. Siebel Technical Support will automatically send email alerts to the email address listed in your user profile whenever a new Service Request is created or an update occurs on your Service Requests.
My Company's Change Requests	This view allows you to view Change Requests (enhancement requests and product defects) that have been logged on behalf of your company and the associated Service Requests. Drilling down on the Change Request takes you to the status, which is updated by Siebel Product Marketing.

Maintenance Release Requests	You are able to track the status of your Maintenance Release requests easily and conveniently by viewing them online in your SupportWeb account.
File Upload/Download	This is a secure FTP site for transferring files to Siebel Technical Support or downloading files, such as maintenance releases, from Siebel Systems. An account automatically is created for all new customers. Designated Contacts will receive an email message with access information. If you are a Designated Contact and have not received this information, please contact support@siebel.com. For more detailed information see the Upload/Download section of SupportWeb.
Help	Siebel SupportWeb's online help will answer many of your questions about Siebel Technical Support's Web support service.

■ Why do I need to store my system profile on Siebel SupportWeb?

Within Siebel SupportWeb there is functionality for creating and storing system profiles, which are collections of information about a user's environment. SupportWeb users are encouraged to create system profiles to store third-party product information, such as Database, Database Server OS, Application Server OS, and much more. Users can set up multiple system profiles to represent various systems in different environments, such as test, development, or production. A system profile is required to enter a service request and the data within the system profile populates the service request required third-party product information, Siebel product release, and Siebel version, thereby streamlining service request entry.

Additionally, system profile data provides Siebel Systems with a detailed picture of third-party products in use to more effectively resolve technical issues, prioritize maintenance releases, and proactively notify customers about critical issues and new content posted within SupportWeb.

To establish a system profile, navigate to My Service Account from the SupportWeb home page and click on My Company's Implementation Projects and System Profiles. There you will be able to create and name an implementation project and the related system profiles for that product, and insert records for the Database, the App Server O/S, the DB Server O/S and other third-party products associated with that system profile.

Assigning Severity Levels to Services Requests

■ How are Service Requests prioritized for resolution?

Service Requests are assigned a severity level according to the impact on your business. Please use the definitions in Table 3 to assess your situation and provide the appropriate severity level when logging a Service Request with Siebel Technical Support. A support representative will confirm that the correct severity level has been assigned based on the information provided in the Service Request. Please refer to the "How to Get the Most out of Technical Support" section on the Siebel SupportWeb home page for further information and examples of each severity level.

Table 3. Severity Level Definitions

Severity Level	Response Time	Description
Level 1—Critical Business Impact	One Hour*	Customer's production use of the program is stopped or so severely impacted that the customer cannot reasonably continue work. Siebel Systems will begin work within one hour of notification during Technical Support's normal business hours and will engage the development staff as needed until an acceptable workaround is achieved.
Level 2—Significant Business Impact	Two Hours*	Important program features are unavailable with no acceptable workaround. Customer's implementation or production use of the program is continuing. However, there is a serious impact on the customer's productivity or service levels. Siebel Systems will begin work on the program error within two hours of notification during Technical Support's normal business hours and will engage development staff as needed until an acceptable workaround is achieved.
Level 3—Business Impact (Standard Severity)	One Business Day	Important program features are unavailable but a workaround is available; or less significant program features are unavailable with no reasonable workaround. Customer's work, regardless of the environment or product usage, has minor loss of operational functionality or implementation resources. Siebel Systems will begin work on the program issue within one business day of notification during Technical Support's normal business hours and will engage development staff as needed.
Level 4—Business Impact (Standard Severity)	Two Business Days	Customer requests information, an enhancement, or documentation clarification regarding the programs but there is no impact on the operation of the programs. Customer's implementation or production use of the programs is continuing and there is no work being impeded at the time. Siebel Systems will provide initial response regarding the requested information or documentation clarification within two business days during Technical Support's normal business hours and will consider program enhancements for inclusion in a subsequent program update.

* Denotes business hours, except for Gold Support and Rollout Support Option customers, who receive support for Severity 1 & 2 issues 24x7.

Choosing the Right Siebel Support Offering

■ What are the Siebel Support Offerings?

Siebel Systems offers a range of support programs to suit the needs of companies with varied business requirements. Whether your business is small and in a single location or a multinational corporation, Siebel Technical Support has the right offering to fit your needs. The following section describes the support programs and the features within each offering. Please contact your sales representative for further details on purchasing any of these services.

■ What is Standard Support?

Siebel Systems' foundation level of technical support is intended for companies that have basic service needs. Standard Support includes the following:

- Second tier technical support, wherein Siebel technical support engineers provide support to up to two designated support contacts, who are Siebel trained contacts at your company. The Designated Contacts are responsible for providing support to other users at your company.

- Support hours are from 6:00 A.M. to 6:00 P.M. Pacific Time. Outside of the Americas, local business hours are 9:00 A.M. to 6:00 P.M. Both include Monday through Friday and exclude holidays.

- Siebel SupportWeb, which provides designated contacts with the ability to submit, track, and update Service Requests online. Users can also view their Change Requests, Maintenance Release Requests, and support agreement information. An extensive knowledge base of solutions and product documentation is also included for problem resolution assistance. In addition to the designated contact accounts, you also will receive one read-only account to Siebel SupportWeb for your entire project team.

- Software maintenance releases are provided on a regular basis for significant business impacting product defects. Customers are encouraged to stay on the latest maintenance release.

- Software updates (for example, Version 6.0 to Version 6.3) are provided for the products you currently have licensed and supported.

- Major software version upgrades (for example, Version 6.0 to Version 7.0) are provided for the products you currently have licensed and supported.

- You are entitled to two designated support contacts, who receive support directly from Siebel technical support engineers.

- Siebel Systems provides one copy of software updates to be shipped to one designated shipping site.

■ What is Gold Support?

For companies with more comprehensive support needs than those met by Standard Support, including the requirement for 24 x 7 support, Siebel Systems offers Gold Support. Gold Support consists of all of the features within the Standard Support program, and includes the following additional features:

- 24 x 7 support to provide coverage all day, every day, for production usage Severity 1 and Severity 2 issues. For all other issues, normal business hour coverage applies.

- Eight designated support contacts who receive support directly from Siebel technical support engineers. This increase of six Designated Contacts allows more of your employees to interact with Technical Support and allows you to spread your internal support responsibilities among your team members.

- Siebel Systems provides one copy of software updates to up to three designated shipping sites, instead of the one shipping site included in Standard Support.

- Multiple region support, which allows your company to obtain support in all global regions, the Americas, Asia Pacific, and Europe, instead of one primary region.

- Support Account Manager (SAM)—Gold Support customers who meet the annual maintenance fee minimum for a SAM will be assigned a SAM. The SAM's responsibilities include:

♦ Being knowledgeable of the details and specifics related to the customer and their implementation and ensuring the customer's system profile is current.

♦ Acting as the primary Technical Support point of contact for the customer and TAM to proactively deliver information that is deemed helpful to the customer based on their implementation details (for example, Statements of Direction, technical notes, and alerts).

♦ Conduct regular calls and Service Request reviews with customer.

♦ Follow up on areas of improvement identified in Satmetrix Surveys.

♦ Provide notification to the Duty Manager of any scheduled after-hours requirements, such as in an upgrade situation.

■ Are there other Support Options?

Siebel Systems realizes that every customer is unique and many have needs that are different than its core support offerings. If you would like to customize your support program, you also have the option of purchasing additional program features:

• Additional designated support contacts.

• Additional software shipping sites.

• Support for an additional database server platform.

• The Rollout Support Option, which provides Standard Support customers with 24 x 7 support in weekly increments during their product implementation or upgrade phase. This service offering allows customers to extend their support coverage to 24 x 7 for Severity 1 and 2 issues during those critical periods when normal business hour coverage is not enough. The Rollout Support Option provides the benefit of minimizing risk, quickly and accurately resolving any issues that occur, and completing the installation or upgrade without incident and by the planned deadline.

Reporting a Problem

■ How are problems reported?

Siebel Technical Support is focused on providing you with accurate answers that resolve your issues in a timely and courteous manner. Your Designated Contacts can report software problems and find technical information using the following methods.

Siebel SupportWeb is the primary means for Designated Contacts to log Service Requests to Siebel Technical Support. By submitting a Service Request on Siebel SupportWeb, customers are able to document, in their own words, the problem they are experiencing and any relevant details, such as error messages. These issues are instantly visible to product experts in Technical Support and receive a response in a time frame that corresponds to the severity of the situation. Please refer to the "How to Get the Most out of Technical Support" section on the SupportWeb home page for more information about severity level definitions and response guidelines.

Additionally, the online help in the Service Request area of Siebel SupportWeb provides more information about how to log a Service Request, how they are processed, and to which product areas your Service Requests should be logged.

■ What information needs to be provided?

When submitting a Service Request, you should be prepared to provide the following information. The more details you can provide, the faster Siebel technical support engineers will be able to resolve your issue.

- Siebel product and version (version example: version 7.5.2 instead of version 7).

- Database and version.

- Client operating system.

- Application Server operating system.

- Product Area (for examples, Client Functionality, Installation, Assignment Manager)—a list of Product Areas and the issue types that fall into these areas can be found in the online help in the Service Request section of Siebel SupportWeb.

- Severity Level.

- Environment where the problem is occurring (Development, Production, or Test).

- Relevant error numbers and error messages exactly as they appear on the screen. Please send large files, such as log files, to Technical Support via the FTP upload method in Siebel SupportWeb. You may also attach them directly to your Service Request if they are smaller than 6 MB. If you send the files by FTP, please notify Technical Support of the file transfer by updating your Service Request or by sending an email to support@siebel.com with the Service Request number. This will make sure that Technical Support knows to which Service Request the file relates.

- The steps to reproduce the problem against the standard Siebel product.

- For configuration specific issues, please cite a minimal test case against the standard (preconfigured) Siebel product to reproduce the behavior.

- Any other details and background information that you think would be helpful.

NOTE: Issues logged through Siebel SupportWeb are monitored continually during the Support Center's business hours. For customers who have purchased Gold Support or the Rollout Support Option and require after hours support for a Severity 1 or 2 issue, please follow the normal process for logging a Service Request through Siebel SupportWeb. Then, phone Siebel Technical Support as specified in the Telephone section to alert them to this issue.

■ Can SupportWeb be accessed by email?

If you are unable to access Siebel SupportWeb, you may use an email message with the relevant information (listed in the previous question) to log your request. You also may use email to send supporting documents for Service Requests logged by other methods. Please reference your Service Request number in these cases. Send email messages to Siebel Technical Support at support@siebel.com. If you have access to SupportWeb, please submit and update requests within your SupportWeb account for fastest response.

Please use email to log Service Requests only if you are unable to access Siebel SupportWeb, such as if there is a temporary outage or if your company does not allow JavaScript, which is a mandatory requirement to view Siebel SupportWeb. Please specify the reason for submitting your issue by email as

opposed to Siebel SupportWeb so that Technical Support can address Web-related problems without further delay.

- Can SupportWeb be accessed by telephone?

Designated Contacts may contact Siebel Technical Support by telephone for Severity 1 and 2 issues or to follow up on existing urgent issues.

Please use the following telephone numbers for your country or the one closest to your country:

North America: 1 800 214 0400 or +1 650 341 0700

Brazil (São Paulo):   +55 11 3444 0800

UK (London):   +44 1784 494949

Ireland (Galway)   +44 1784 494949

Germany (Munich):   +49 89 957 18 400

France (Paris):   +44 1784 494949

Japan (Tokyo):   0120 606 750 (Japan domestic only)
                        or +81 3 5464 7948 (Outside of Japan)

Singapore: +65 6212 9266

If outside of your local support center's hours and you are a Gold or Rollout Support customer, please call +1 800 214 0400 or +1 650 341 0700.

Prior to calling, Siebel Technical Support recommends that you first log the issue on Siebel SupportWeb, and then call to alert Technical Support to your issue. Logging the issue first allows Technical Support to have all the relevant information available when you call. For status updates or follow-ups on existing issues, Technical Support recommends that you check your Service Requests on Siebel SupportWeb. If you are unable to access Siebel SupportWeb, please email your requests to support@siebel.com. Please refer to the Using Technical Support section in SupportWeb for further information.

For customers who have purchased Gold Support or the Rollout Support Option and require after hours support for a Severity 1 or 2 issue, please follow the normal process for logging a Service Request through Siebel SupportWeb. Then phone Siebel Technical Support, as specified in this section, to alert them to this issue.

Resolving Urgent Issues

- How can we indicate that an issue is urgent?

Siebel Technical Support understands that there may be instances or a specific situation when the severity level of your issue does not match its business urgency. To meet this need, Technical Support has included a Special Consideration field in the Submit New SR form on Siebel SupportWeb. You may indicate in this field whether your issue is urgent. As much as possible, Technical Support's engineers take this into consideration as they begin resolving your issue.

- What is the escalation process?

Siebel Systems will make every attempt, within the guidelines for the severity level of the issues, to resolve all reported problems promptly. In the exceptional cases where an escalation is necessary, the escalation process should be used to make sure that additional attention is provided to the issue.

To escalate a Service Request

1. Call the main Technical Support phone number for your region and request that your issue is escalated.

2. A Technical Support Manager will then contact you. If either you or Siebel Systems judge that a situation requires a higher level of resource or communication than normal, both you and Siebel Systems should expect to dedicate whatever technical and managerial resources are deemed necessary to resolve the problem.

3. Siebel Systems will assign an Escalation Manager as the communication focal point for the issue.

4. All plans and status will be relayed through the Escalation Manager to provide prompt, accurate, and complete communication.

Software Maintenance Releases, and Updates

■ When are software maintenance and updates delivered to supported customers and partners?

Siebel Systems will provide software maintenance releases as they become available to supported customers and partners. If the maintenance release is found to be successful in resolving a product issue, it must remain in place until the next Siebel software release incorporates the fix. Siebel Systems will maintain a record of all maintenance releases delivered to you, with the expectation that such software actually has been installed on all appropriate machines and is in place following resolution of a problem. It is important to keep your system profile data current on SupportWeb to make sure Siebel Systems has accurate information about your installed versions as this may affect whether a maintenance release is proactively delivered to you.

■ How are we notified that a fix or maintenance release is available?

The Siebel Weekly Content Notification service is available to all supported customers and partners. All designated contacts are automatically subscribed and receive a weekly email that includes Hot Topics, as identified by Siebel Technical Support, and new content that has been posted in the SupportWeb knowledge base during the previous week. Additionally, as you use Support Search on SupportWeb, you may discover that a fix already exists for a problem you are experiencing. Siebel Alerts or other users' Service Requests may have identified known anomalies that require the use of a maintenance release. You also will be able to find out which maintenance releases are available by viewing the Maintenance Release Guides area within the Product Documentation section on Siebel SupportWeb.

Product updates incorporate all the changes included in software maintenance releases. You are expected to install releases within a reasonable amount of time following their delivery. The installation reduces the likelihood that you will encounter a problem that has already been fixed.

■ What is the duration of technical support contracts?

Siebel Systems provides technical support for a specified duration based on your Software License and Services Agreement (SLSA). The initial period typically is one year, with an option to annually renew your maintenance contract. Please refer to your SLSA for complete details of your support agreement or view your support agreement information in your SupportWeb account.

■ Are we entitled to updates automatically?

Siebel Technical Support is provided only to those customers whose software maintenance fee has been paid in accordance with the Siebel Software License and Services Agreement (SLSA) and whose maintenance contract covers current dates. If your maintenance contract has lapsed and you would like to purchase technical support, please contact your Siebel maintenance renewals representative. If you do not know who your maintenance renewals representative is, please contact renewals@siebel.com, indicating that you would like information on renewing your support contract.

■ What measurements are in place to evaluate technical support?

Siebel Systems conducts frequent customer satisfaction surveys to make sure that Siebel Technical Support meets your organization's expectations. Siebel Technical Support surveys customers for all Service Requests to find out how satisfied you are and where it can improve. Technical Support looks forward to hearing from you and encourages you to provide feedback when a third-party representative surveys you or when Siebel Technical Support surveys you. Customer and partner feedback is instrumental in helping Technical Support prioritize areas for improvement.

In addition, you may mail or email any additional comments or suggestions that would help Technical Support improve the service you receive:

Siebel Technical Support
2207 Bridgepointe Parkway
San Mateo, CA 94404

Email: support@siebel.com

Engaging Siebel Technical Support

Call Siebel Technical Support at 1-800-214-0400 or 650-341-0700, or email support@siebel.com.

For inquiries regarding Siebel Maintenance Renewals, call 1-888-465-9755 or email renewals@siebel.com.

Monitoring Progress and Measuring Success

Siebel Systems assists customers in measuring and analyzing the business impact of their CRM projects. Service offerings such as Siebel Satmetrix *e*Surveys, Siebel Implementation Effectiveness Diagnostics, and Siebel Implementation Effectiveness Reviews help customers achieve their desired ROI objectives.

■ ***Siebel Satmetrix eSurveys*** offer organizations a closed-loop loyalty management process that measures, tracks, analyzes, and improves customer, partner, and employee satisfaction through a combination of Web-based surveys, preconfigured integration of survey results with Siebel *e*Business Applications, and post-survey consulting.

Preconfigured integration of Satmetrix and Siebel *e*Business Applications provides end users with a single location to analyze attitudinal and behavioral data for their customers within the Siebel user interface. Additionally, email trigger integration ensures timely follow up by appropriate account team members to resolve customer issues. See Figure 3.
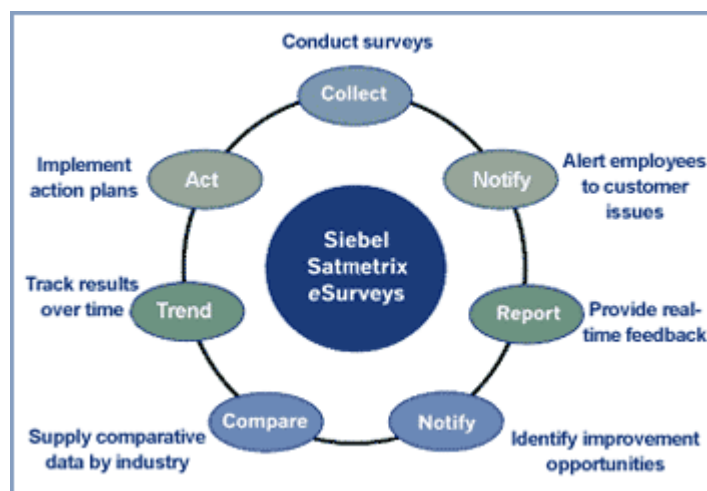

Figure 3. Siebel Satmetrix *e*Surveys

A key component of a complete CRM solution is gaining accurate and timely insights into the attitudes, preferences, and expectations of customers. The information provided by Siebel Satmetrix *e*Surveys allows companies to more effectively manage customers throughout each phase of the customer lifecycle, maximize customer loyalty, and enhance customer lifetime value.

■ *Siebel Implementation Effectiveness Diagnostics* help organizations assess the end user experience with Siebel *e*Business Applications. This instrument is designed to evaluate several factors that impact the quality of the implementation process. Survey results provide customers with information on how to improve implementation effectiveness and:

- Provide objective third-party feedback on whether implementation is on track to deliver business benefit

- Help customers focus future investments that will have the greatest impact on improving implementation effectiveness while minimizing customer's resource expenditure

- Provide comparative data to allow companies to benchmark themselves against companies in similar roll-outs and in similar industries

■ *Siebel Implementation Effectiveness Reviews* take a broad look at the Siebel implementation to assess its effectiveness and efficiency. The review delivers a shared action plan, as well as a detailed report with recommendations for increasing:

- User productivity and performance

- User adoption

- User satisfaction

- Return on Siebel investment

Frequently Asked Questions Regarding Siebel Satmetrix eSurveys, Siebel Implementation Effectiveness Diagnostic, and Siebel Implementation Effectiveness Reviews

■ How do Siebel Satmetrix eSurveys integrate with Siebel eBusiness Applications?

The offering integrates with Siebel *e*Business Applications on both the front and back ends. First, on the front end of the survey process, customer, employee, or partner data can be exported from Siebel Applications to create the survey contact list by using either the Export functionality or creating a custom SQL script. Second, on the back end of the process, *survey results integration* facilitates the communication of survey results while *email trigger integration* allows effective management of the follow-up process.

■ What is results reporting integration?

The preconfigured integrated solution with Siebel 7.5 provides an interface for Siebel *e*Business Applications users to view survey results for accounts and contacts. A Satmetrix Surveys tab on the account or contact applet retrieves the necessary account, contact, and configuration information from the Siebel database. This information is used to dynamically generate a URL that provides secure access to the Satmetrix report, for the account or contact selected, without the need for an extra login step and within the Siebel user interface.

■ What is email trigger integration?

Triggered emails, sent after either a completed survey response or a negative response to a preselected question or set of questions, can be sent directly to account team members and stored in Siebel, with an Activity with attachment automatically created to initiate the follow-up process. Integrating survey responses with Siebel Workflow allows for timely follow-up by appropriate personnel and effective management of the entire follow-up process.

Engaging Siebel eSurveys and Siebel Implementation Effectiveness Reviews

Call Siebel Global Services at 1-888-465-9755 or email SiebelGlobalServices@siebel.com.