Oracle Artificial Intelligence

Using AI Apps for Sales

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Get Help

Here's an introduction to some information sources that can help you use the application and this guide.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_aiapps_doc_feedback_grp@oracle.com*.

Thanks for helping us improve our user assistance!

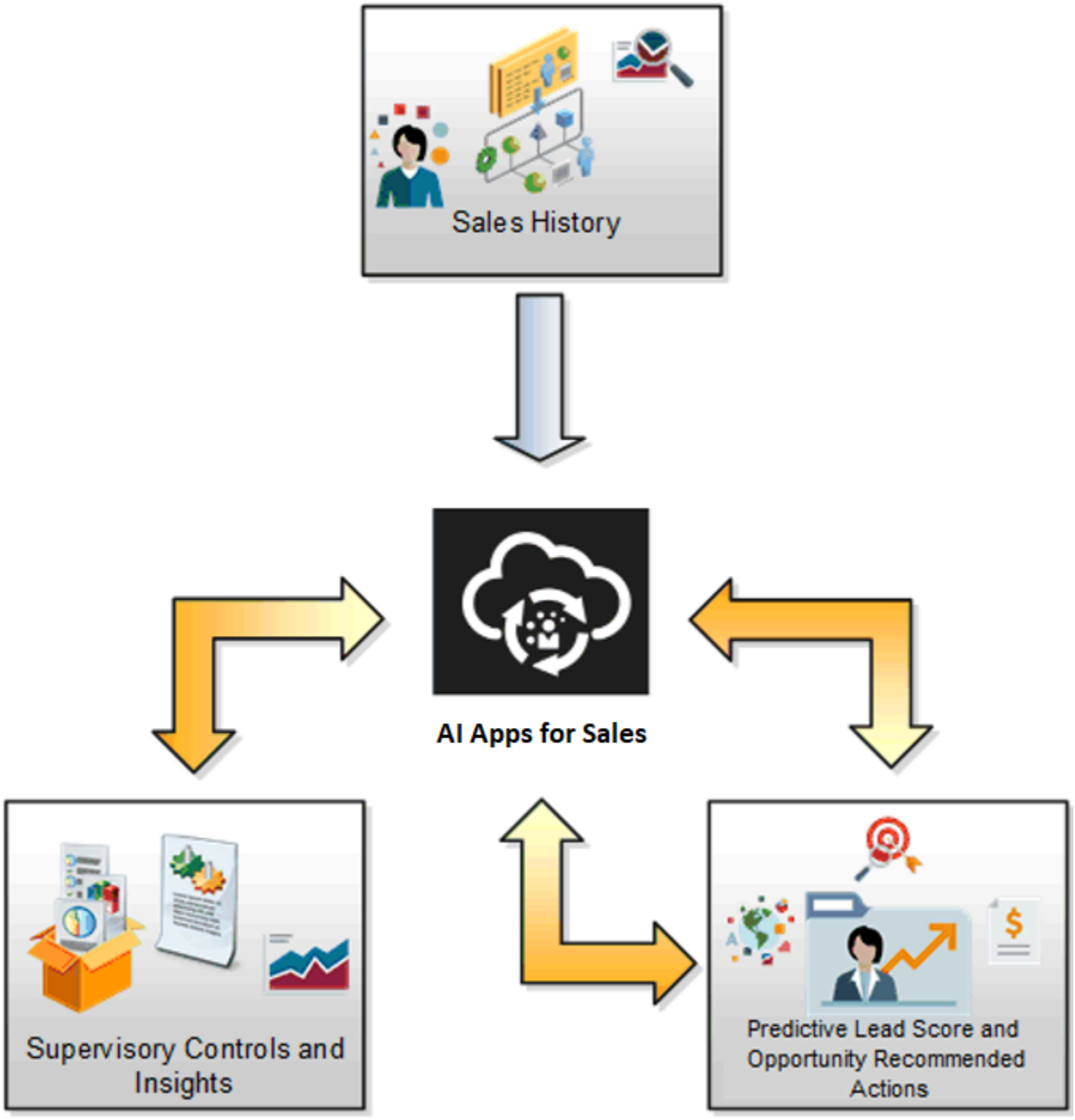
5 Overview

Welcome to Oracle AI Apps for Sales

Oracle AI Apps combines decision science and machine learning to help your salespeople increase and accelerate sales. When salespeople work on leads, they see AI Apps predictive lead score that helps them prioritize their leads better. When they view their opportunities, they get recommendations to increase their win rates. Salespeople can use these features to improve their productivity and close deals faster.

This image illustrates the high-level flow of data feeding into Oracle AI Apps for Sales to:

- Predict lead scores
- Predict opportunity win probability
- Recommend actions for opportunities



Predictive Lead Score

The AI Apps models predict scores for leads based on your organization's lead history, activities, and relevant data. Your salespeople can view the AI Apps predictive lead scores and focus on leads that are most likely to convert to opportunities. Let's look at an example. A salesperson has about 50 marketing qualified leads in her territory. She doesn't have the time to follow up on each of these leads individually. She sees that about 10 of these leads

have predictive lead scores of 80 or more. She immediately knows that these 10 leads are most likely to convert to opportunities and decides to pursue them.

Opportunity Recommended Actions

The AI Apps models estimate win probability for opportunities. If there's a mismatch between the models' estimate and the salesperson's estimate, it alerts the salesperson. The models also estimate opportunity win probabilities for all recommended actions so that salespeople see only those with higher win probability estimates. Your salespeople can use the recommended actions to improve their chances of winning opportunities.

Let's look at an example. Suppose the role marked as the primary contact on an opportunity correlates with a low win rate in the past. The reason might be that this contact isn't the decision maker in the organization. And so the models recommend that the salesperson checks that the primary contact is the decision maker.

Recommendations Displayed on Opportunity Pages

Your salespeople see recommendations for their opportunities when AI Apps models detect that taking a particular action improves the chances of winning an opportunity. Recommendations provide useful actions to help salespeople convert their opportunity to a win.

Recommended Action Type	Action (Displayed in Oracle CX Sales)	Description (Displayed in Oracle CX Sales)
Activity Frequency Low	Contact this account	Log more activities for this opportunity. Opportunities that we win have more frequent contact.
Time Since Last Activity High	Contact this account today	Speak to this account since there has been a gap in activities. Opportunities that we win have more frequent contact.
Deal Size High	Consider whether this deal size is realistic	Improve the win probability by decreasing the deal size if appropriate.
Contact Count Low	Broaden your contact base	Engage with more contacts as similar opportunities that closed with a win had engagement with more contacts.
Total Activities Low	Contact this account	Log more activities for this opportunity. Opportunities that we win have more activities.
Competitive Influence Strong	Review competitive plays	Improve your chances of winning by ensuring that you're well-differentiated from the primary competitor.
Deal Size Low	Consider increasing the deal size	Improve the win probability by increasing the deal size if appropriate.
Age High	Check that your opportunity is still relevant	Typically, similar opportunities close much faster.

Recommended Action Type	Action (Displayed in Oracle CX Sales)	Description (Displayed in Oracle CX Sales)
Contact Title Low Converting	Verify that the primary contact is the decision maker	Review the decision-making ability of the primary contact to improve your chances of winning.
Time Spent in Stage High	Verify the sales stage	Verify that the sales stage shows the correct status. Similar opportunities that closed with a win are no longer in this stage after this length of time.
Momentum Low	Review sales stage and increase momentum	Increase momentum as similar opportunities that closed with a win moved through the sales stages faster.

An administrator can edit the default recommended actions to suit your requirements. See *Set Up Best Sales Action for Opportunities* for details.

Set Up Oracle AI Apps for Sales

You need to complete the onboarding steps for Intelligence in Sales and then set up the connection to AI Apps for Sales. You then have to configure specific features based on what features you're using.

Here are the set of steps you need to complete:

1. Complete the common onboarding steps for Intelligence in Sales. See *Enable Sales Intelligence Features*.
2. Set up the connection to AI Apps. See *Import Data from Oracle CX Sales*.
3. Configure attributes and filters to determine the predictions for opportunity win probability and lead scoring. See *Set Up Attributes and Filters for Opportunity Win Probability and Lead Scoring Prediction*.
4. Complete all the configuration steps required for recommendations and lead scores to display on opportunities. See *Configure Lead Scores and Recommended Actions*.

Version Compatibility

Use the application on devices with a width of 768 pixels or higher. For detailed information on Oracle's browser support policy, see *System Requirements for Oracle Applications Cloud*.

This table lists version compatibility for the supported integrations.

Integrated Application	Version Requirement
Oracle CX Sales	Oracle CX Sales Release 13 (update 18B) or later (for opportunity win probability and recommended actions)
	Oracle CX Sales Release 20D or later (for predictive lead scores)

Integrated Application	Version Requirement

Accessibility

You can use assistive technology products, such as screen readers. You can also use the keyboard instead of the mouse. This table lists the supported accessibility features for Oracle AI Apps for Sales.

Feature	Description
Zoom	You can use your browser's zoom feature to resize text up to two hundred percent without loss of content or functionality.
Contrast	Large-scale text and images of large-scale text have a contrast ratio of at least 3:1. Other text and images of text have a contrast ratio of at least 4.5:1.
Screen Reader	You can use screen readers. No special mode is required to enable them.
Timing Adjustable	If you experience being timed out of the application, your Oracle Identity Cloud Service administrator can extend the session expiry period.

Privacy Regulations and Data Protection

This topic introduces important aspects related to privacy and data protection.

Some jurisdictions, such as the European Union with its General Data Protection Regulation (GDPR), require special control to maintain privacy of personal information. Oracle AI Apps for Sales has capabilities to help you comply with these rules.

For details on privacy and security for Oracle CX Sales, see *Privacy and Security Feature Guidance for all Oracle Services (Doc ID 114.2)* on My Oracle Support. Navigate to **Customer Experience** > **Engagement – Sales & Service**, and open the PDF Oracle Fusion Engagement Cloud (Sales, Service, Customer Data Management, & Loyalty).

Consumer Consent

The AI Apps models use consumer data within Oracle CX Sales to enhance salespeople's likelihood of closing opportunities. The models use consumers' profile attributes and their purchase history to make recommendations. For example, the models may recommend that the salesperson provides unique product feature information to a certain consumer before quoting a price.

Ensure that the data you store in Oracle CX Sales and use in machine learning is restricted to consumers who have given explicit consent.

Consumers' Right to be Forgotten

If consumers remove consent, you must delete their data from Oracle CX Sales. The consumer data is subsequently deleted in Oracle AI Apps for Sales during the next ingestion process.

6 Insights

Opportunity Win Probability Reports

You can view opportunity win probability reports on the Insights page to better understand how AI Apps recommendations are working for your opportunities.

In Setup and Maintenance, go to the following:

- Offering: Sales
- Functional Area: Intelligence in Sales
- Task: Configure AI Apps in Sales

On the Configure AI in Sales page, click **Insights**. On the Insights page, click **Opportunity Win Probability** to review the reports.

Recommended Action Status Report

Use the status report to review the trend in the number of actions recommended to your salespeople during a 12-month period.

You can also monitor data ingestion by checking the number of open opportunities and the opportunities that closed in the last 30 days. If you don't see these numbers, check your connection settings or contact Oracle Support.

Opportunity Prediction Accuracy Report

Review the accuracy of AI Apps predictions of opportunity outcomes.

The report counts the prediction as accurate if it was correct two-thirds of the way through the opportunity life cycle. For example, let's take an opportunity that was open for 90 days and closed on September 30th. The report checks the outcome against the prediction given on August 30th. If the opportunity win prediction was greater than 50% on August 30th, and the opportunity outcome was a win, the application considers the prediction as accurate.

If the graph on the report shows a lot of variance between months, you can select **Show Moving Average** to view the average from all previous data.

Lead Conversion Probability Reports

You can view lead conversion probability reports on the Insights page to better understand how AI Apps predictions are working for your leads.

In Setup and Maintenance, go to the following:

- Offering: Sales
- Functional Area: Intelligence in Sales
- Task: Configure AI Apps in Sales

On the Configure AI in Sales page, click **Insights**. On the Insights page, click **Lead Conversion Probability** to review the reports.

Lead Prediction Status Report

Use the status report to review the trend in the number of predicted leads shown to your salespeople during a specified 12-month period.

You can also monitor data ingestion by checking the number of open leads and the leads that closed in the last 30 days. If you don't see these numbers, check your connection settings or contact Oracle Support.

Lead Prediction Accuracy Report

Review the accuracy of AI Apps predictions of lead outcomes during a selected period. The accuracy is based on how many high-scoring leads got converted to opportunities. The report counts the prediction as accurate if the lead score was above 70% when the lead got converted to an opportunity.

If the graph on the report shows a lot of variance between months, you can select **Show Moving Average** to view the average from all previous data.

7 Data Processing Status

Overview of Data Processing Status

Use the Data Processing Status page to view a summary of ingested data in the application.

The summary includes the number of ingested open and closed opportunities, activities, contacts, open and closed leads, and so on.

In Setup and Maintenance, go to the following:

- Offering: Sales
- Functional Area: Intelligence in Sales
- Task: Configure AI Apps in Sales

On the Configure AI in Sales page, click **AI Apps Connections** to view data sources and their status. To view the data processing status, click **View Status** on the Data Sources page.

On the Data Processing Status page, use the summary to know the volume of data ingested as compared to the data volume in Oracle CX Sales. For example, if you see that the overall data volume in Oracle CX Sales doesn't match the data volume in the data processing summary, you know there's potentially an issue with data processing.