

# Oracle Siebel CRM Statement of Direction

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## Purpose statement

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

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## Executive Summary

AI-driven automation and unified customer experiences are shaping the CRM and Customer Experience market, with success hinging on high-quality, compliant data and modern infrastructure. Organizations are embracing omnichannel and headless CRM strategies through cloud-native, API-first architectures to deliver consistent, integrated customer journeys and 360° customer views. The ability to expose custom built processes to be executed by external systems and agentic AI has become critical for organizations. Security of the application and data has become a key concern for enterprises in the age of AI. Privacy, regulatory compliance, and industry-specific capabilities remain essential as platforms evolve to provide intelligent, real-time engagement and measurable business value.

### Anything is Possible

Siebel continues to excel as a highly scalable, configurable platform with a proven record in large-scale CRM deployments, offering economic value and long-term ROI. Beyond traditional CRM, Siebel enables the delivery of enterprise solutions that truly meet the needs of your organization with deep industry expertise. Siebel CRM is unique in that it provides an open and flexible approach to deployment, UX, integration and AI options—empowering organizations to achieve operational excellence and superior customer experiences, whilst staying aligned with industry standards.

### Delivering AI on Trusted Enterprise Foundations

AI is fundamentally changing how enterprise applications are built and used. As organizations adopt AI, the greatest value comes not from replacing existing business systems, but from enabling AI to leverage the trusted data, business processes, and automation that enterprises have refined over decades.

Siebel CRM is unique in that it has rich business processes, a comprehensive enterprise industry data model, and a mature integration framework which provide a solid foundation for intelligent automation and autonomous business workflows. Complete, with an open architecture that enables organizations to incorporate the AI technologies of their choice - from predictive analytics and generative AI to agentic AI assistants, without disrupting existing business processes or being locked into a single AI vendor ecosystem.

By combining decades of enterprise CRM capabilities with cutting-edge AI innovation, Siebel helps organizations boost human productivity, automate complex customer interactions, and deliver intelligent, context-aware experiences while protecting existing investments and maintaining enterprise-grade governance, security, and scalability.

Our belief is that organizations should not have to reimplement years of proven business logic simply to adopt AI. Instead, organizations should be able to elevate their existing Siebel implementations by exposing trusted business capabilities to AI, preserving the governance, security, and business rules already embedded within their applications.

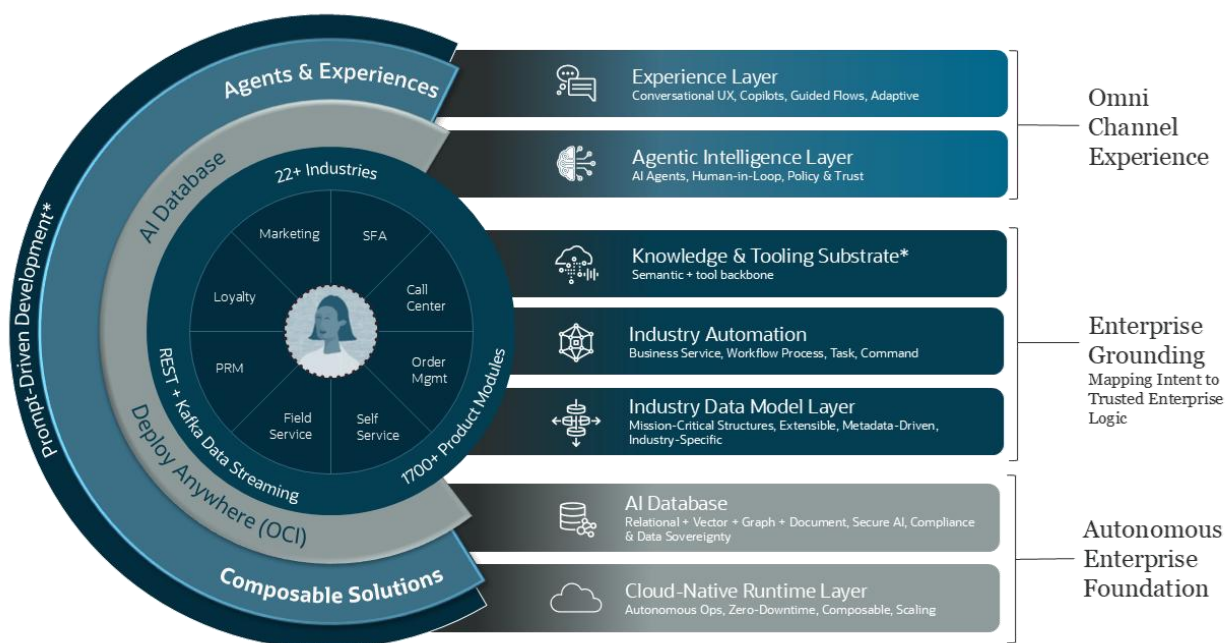
Our approach to capitalize on this opportunity is built on several key design principles:

- **Maximize Reusability:** Leverage extensive data and workflows in Siebel to seamlessly infuse AI and automation directly into your fine-tuned business processes.
- **Focus on Core Strengths:** Build on proven foundations like data model, automation, and knowledge graphs while maintaining openness for integration and extensibility.
- **Retain Openness & Flexibility:** Adopt Oracle solutions where they lead and support "Bring/Build Your Own" solutions elsewhere, including multi-cloud support and being LLM-agnostic.
- **Ensure Consistency:** Standardize on the Oracle Database and Linux for data and operations, embrace cloud-native practices, and accelerate innovation adoption on our latest releases.
- **Holistic Approach:** Empower developers, operations, and business users with AI in every interaction, while maintaining the highest standards of data security and governance.

The architecture shown below illustrates our vision for AI.

At its foundation are the cloud-native runtime and AI database capabilities that provide a modern platform for enterprise AI. Building on this foundation are the industry data model and proven business automation capabilities in Siebel CRM. Complementing these are AI platform capabilities, developed using open standards, that make trusted data, business processes, and automation available to intelligent, external systems.

Together, these capabilities form the **Enterprise Grounding** layer, providing trusted business context and enabling organizations to build AI-powered experiences using the AI platform of their choice. This foundation empowers a new generation of AI-powered experiences - including AI agents, copilots, guided workflows, conversational interactions, and composable enterprise applications - that extend existing capabilities in Siebel CRM, rather than replacing them.



## Accelerate Adoption with Sample Applications

As AI technologies continue to evolve at a rapid pace, we recognize the need to complement our enterprise-grade release process with greater agility and closer customer collaboration. To support this objective, we introduce Sample Applications that enable customers to quickly evaluate new AI capabilities in their non-production environments.

These Sample Applications are intended to facilitate early adoption and rapid feedback, allowing us to refine and enhance capabilities at an accelerated timeframe. before they are made generally available (GA). Customers may extend these Sample Applications for production use following their own testing, validation, and governance processes.

Reflecting our strategy and vision, the roadmap for Siebel CRM is split into two high level, persona-based categories: Business & Applications (Users, Customers) and Platform & Operations (Developers, Architects, & Operators).

## Business & Applications (Users, Customers)

The speed of business change has markedly accelerated as AI adoption reaches through all layers of the enterprise. Innovations in this theme enable improved customer experiences and revenue growth through both delivered and customer configurable experiences.

### User Experience

#### Elevate every User Interaction and Accelerate Productivity

Our open, flexible approach to user experience (UX) empowers customers to select and shape digital interactions that best fit their unique organizational strategies. Embracing industry-leading technologies, Siebel CRM is dedicated to delivering not just an intuitive out-of-the-box interface, but also a dynamic framework for building personalized UX across devices - including a robust “headless” architecture and the inclusion of “no-code” and “low-code” options for UX development. Siebel CRM’s adoption of the Redwood design system marks a bold step toward delivering modern, consumer-grade experiences that inspire end-users and empower technical teams alike.

### Redwood UX

#### Enable Seamless and Consistent User Journeys Across Devices

Building on the success of the Redwood UX introduced in our 24.6 release, we remain committed to advancing Siebel CRM’s user experience with enhancements that drive both usability and business value. Our continued goal is to ensure a truly unified, intuitive interface across all devices, helping customers maximize productivity and engagement wherever their teams work. We anticipate the following benefits and business value:

- Increase user productivity and accelerate onboarding with faster, more natural user interfaces.
- Enable users to personalize their navigation style to match their workflow preferences.
- Drive higher user satisfaction, making Siebel CRM a more attractive platform for both current and prospective customers.

Key features planned for delivery include:

- **Enhanced Redwood UX for Siebel Mobile**

Redwood UX for Siebel Mobile was first introduced in 20.9, delivering a richer experience for smartphone users. As part of our roadmap, we plan to further enhance the mobile experience with a modern, consistent interface that aligns more closely with Siebel desktop and tablet experiences.

Continually refining Siebel’s Redwood UX, we are dedicated to delivering a modern, device-agnostic experience that empowers users to achieve their best work—anytime, anywhere. These innovations help organizations streamline operations, reduce friction, and unlock increased value from their Siebel CRM investment.

### Web Component Framework

#### Accelerate Modern UI Development with Redwood and Oracle JET

With the Oracle JET (OJET) Web Component Framework, Siebel CRM customers and partners can move confidently into the future—equipped to deliver next-generation experiences that support productivity, engagement, and continual transformation. The Open UI Web Component Framework has established the foundation for delivering modern, Redwood-aligned user experiences on top of Siebel Open UI. By combining Redwood UX with Oracle JET components, the framework enables customers and partners to build intuitive

employee-facing interfaces using declarative JSON configuration. Following delivery of the core framework capabilities, planned enhancements include:

### Natural Language Processing (NLP) Agent and Siebel OJET Design Assistant Studio

This capability will improve developer experience by reducing the need to manually author or update JSON required to bind Siebel Presentation Model behavior to Redwood OJET components.

Today, developers still need to manually configure component mappings, field bindings, actions, events, and related manifest changes. This can slow implementation, increase the risk of schema or binding errors, and create dependency on framework experts.

The Design Assistant Studio will provide a guided UI where developers can review agent-proposed component mappings, inspect generated JSON, validate changes, and take actions such as accept, reject, edit, or ask the agent to revise. Developers will be able to describe the desired business UI in natural language, while the assistant infers the required implementation steps, including JSON configuration, PM wrapper updates, OJET component selection, field bindings, validation, and manifest or expression updates where required.

Key capabilities include:

- **Natural-language configuration:** Describe desired UI layout, fields, behavior, and visual treatment without hand-authoring JSON.
- **Agent-assisted mapping:** Propose mappings between Siebel applet fields, PM collections, Redwood OJET components, actions, and bindings.
- **Guided review and validation:** Allow developers to review, edit, accept, reject, and validate generated configuration before adoption.
- **Explainability and traceability:** Provide assumptions, warnings, validation feedback, and an auditable explanation of generated changes.

With the NLP Agent and Siebel OJET Design Assistant Studio, the framework will evolve from declarative configuration to an agent-assisted development experience, helping customers and partners accelerate UI modernization, reduce manual effort, and deliver Redwood-based Siebel experiences with greater speed and consistency.

## Open UI

### Limitless Customization Meets Modern Usability

Siebel CRM's Open UI empowers organizations to craft uniquely tailored user experiences, providing the versatility needed to align with diverse business requirements and user expectations. Our continued investment in Open UI focuses on delivering fast, intuitive, and modern interfaces—enabling users to work smarter and faster, while positioning IT teams to meet any future UX need. We anticipate the following benefits and business value:

- Accelerate user adoption and reduces training time, lowering TCO and accelerating time-to-value.
- Boost employee productivity, driving measurable gains in operational efficiency.
- Maximize flexibility and future-readiness by supporting both custom and best-in-class third-party technologies.

Key features planned for delivery include:

- **Superior UI Responsiveness:** Simultaneous and parallel loading of applets—within dashboards or across parent/child views—enabling users to benefit from faster access to information, reducing lag and improving productivity.
- **Adaptive Loading:** Lazy loading ensures that critical information appears when needed, so users stay focused and efficient without unnecessary delays.

- **Advanced Hierarchy Editing:** Enhanced support for editing complex hierarchies—like households, contacts, and related entities—in a unified view that will include both vertical and horizontal scrolling for effortless navigation and management.
- **Extensible Rendering Capabilities:** Open UI support for integration with leading third-party rendering frameworks such as Oracle JET, Vue, React, and Angular. This creates unmatched flexibility for organizations seeking leading-edge UI technologies.
- **Pinned List Views:** Frequently used list views can be pinned as defaults, ensuring that users always have instant access to their most valuable records and tasks.
- **Dynamic Data Visualizations:** Interactive, adaptive graphs that present essential information clearly, turning complex data into actionable insights immediately.

By advancing Open UI, we continue to offer our customers unmatched freedom to innovate, delivering a modern, adaptable platform that evolves alongside their business.

## Siebel CRM & Microsoft 365 Productivity Integration

### Seamless Interoperability for the Enterprise Front Office

A new Siebel CRM Outlook Add-In will deliver a modern, Microsoft 365-integrated experience that enables Siebel users to work directly from Outlook while maintaining synchronized customer interactions, activities, calendar events, contacts, and tasks between Siebel CRM and Microsoft 365.

The objective is to improve user productivity, reduce manual CRM data entry, and modernize the integration strategy between both applications. This will provide customers with secure, extensible, cloud-portable architecture aligned with Oracle and Microsoft enterprise requirements.

Beyond productivity enhancements through Outlook integration, our roadmap also includes extension of the platform to Agentic AI, Microsoft Teams, hybrid Exchange/SSSE support, and enhanced Email Response capabilities.

## Intelligent Search

### Power Intuitive, Effortless Search Experiences

Siebel Intelligent Search has evolved from a modern enterprise search platform into a foundation for intelligent discovery. Recent innovations have enhanced search precision, simplified administration, and established the groundwork for AI-powered experiences.

Looking ahead, Oracle plans to continue evolving Intelligent Search beyond traditional keyword-based retrieval by making search more intuitive, context-aware, and action-oriented. Future innovations are expected to leverage advances in natural language processing, semantic search, and AI to help users discover relevant information faster, understand business context more effectively, and take action with less effort.

The roadmap for Siebel Intelligent Search is focused on helping organizations improve productivity and prepare for the next generation of intelligent business applications by:

- Enabling users to search using natural language instead of requiring structured search syntax.
- Extending search beyond document retrieval to surface the most relevant content directly within search results.
- Transforming search into an intelligent entry point for navigation, business actions, and AI-assisted experiences.
- Improving scalability, performance, and long-term supportability through continued investment in the underlying OpenSearch platform.

Planned capabilities include:

- **Natural Language (NLP) Powered Search**

Enhance Intelligent Search with natural language understanding, allowing users to express search requests conversationally while preserving existing validation, security, and access control through the current search framework.

- **Document Section Search**

Improve document discovery by identifying and previewing the most relevant sections within documents directly from search results, helping users quickly determine document relevance without opening the entire file.

- **Actionable Insights**

Evolve the Global Search Bar into a unified Search and Action experience capable of understanding user intent and seamlessly routing users to business records, application views, workflows, or AI-powered assistants from a single-entry point.

- **OpenSearch 3.x Upgrade**

Upgrade the underlying OpenSearch platform to provide improved performance, scalability, security, and long-term platform support while enabling future Intelligent Search innovations.

## AI for Business Users

Consistent with every capability in Siebel CRM, our strategy is to provide a highly configurable platform that enables customers to adopt and extend both Agentic AI and Generative AI to meet their unique business requirements. Beyond the out-of-the-box (OOTB) capabilities delivered with the product, Siebel CRM is designed to empower customers to rapidly build and deploy their own AI-driven use cases while maintaining the flexibility to leverage the technologies of their choice.

Over the past three years, Siebel CRM has delivered a range of Generative AI use cases. We plan to expand with a set of OOTB Agentic AI use cases, prioritized based on feedback and requests from our customers. This section outlines some of the Agentic AI capabilities that we currently intend to deliver:

- **Sales Assistant**

Embedded within the Siebel CRM ordering experience, it is designed to transform how Customer Service and Sales Representatives (CSRs) execute the quote-to-order journey.

- **Service Assistant**

Helps service teams resolve issues faster through case summarization, recommended resolutions, guided knowledge, and response drafting.

- **Loyalty Promotion Assistant**

Enables Loyalty Administrators to use natural language to translate business requirements into complex, structured promotion logic. It automates the creation of Loyalty promotion hierarchical rules and criteria, significantly reducing the manual effort and technical expertise required to manage promotional campaigns.

With intelligent assistants, Siebel CRM customers achieve faster time-to-value, improved operational efficiency, and superior customer and employee experiences—future-proofing their organizations for the AI-driven economy.

## Master Data Management

Achieving a complete customer 360 view requires a master data management (MDM) solution both for customer and product at the heart of your enterprise. Siebel Universal Customer Master (Siebel UCM) ensures a clean and unified profile for all customer data, supported with centralized data cleansing and de-duplication.

### Siebel Universal Customer Master

The Siebel Universal Customer Master (UCM) continues to serve as the foundational Master Data Management (MDM) solution for customer-centric organizations. Our strategic enhancements will further empower enterprises to manage customer data with greater agility, scalability, and integration flexibility—ensuring trusted, actionable insights throughout the business ecosystem. We anticipate the following benefits and business value:

- Drive faster, more reliable customer data synchronization across applications with highly responsive MDM operations, essential for today's digital enterprises.
- Simplify MDM governance and accelerate the integration of new business platforms by minimizing integration overhead for diverse enterprise landscapes.
- Enhance data consistency and operational agility across both legacy and modern endpoints.

Key features planned for delivery include:

- **System Registration Request Service and Approval**  
Streamlines system onboarding and governance by formalizing how new systems register for and are approved to participate in the MDM environment.
- **Siebel CRM and UCM Integration using REST APIs**  
APIs to support match, fetch and other UCM processes from Siebel CRM.

## Party Management

### Real-Time Customer Data for High-Performance Engagement

Party Management is engineered to help organizations provide rapid access to consolidated customer data—empowering seamless, personalized, and highly responsive interactions across the enterprise. By ensuring all customer-facing functions have real-time access to trusted information, organizations can accelerate transactions, anticipate customer needs, and deliver consistently superior service. We anticipate the following benefits and business value:

- Accelerate time-to-action across sales, service, and operations by delivering immediate access to comprehensive customer data such as next best offers.
- Improve customer satisfaction and business agility by enabling consistent, personalized omnichannel engagement.
- Reduce integration complexity and operational costs by leveraging a unified microservices platform that scales with business growth.

Key features planned for delivery include:

- **Unified, Real-Time Customer Data**  
Party Management enables instant access to a single, consolidated customer view across multiple systems—a critical capability for transactional speed and personalized engagement. For example, payment processing can instantly request reliable customer information, and sales associates can seize cross-sell opportunities in real time.
- **Integration with Proven MDM Solutions**

Designed to work seamlessly with Master Data Management (MDM) platforms like Siebel UCM, Party Management leverages deduplication, data cleansing, and survivorship rules to ensure information consistency, reliability, and compliance across all channels.

- **Modern, High-Performance Architecture**

Built on the advanced Helidon-based microservices framework, Party Management offers exceptional performance, scalability, and resilience. A business rule-driven caching mechanism further optimizes response times—allowing organizations to define and control which customer data subsets are instantly available at extreme scale.

With Party Management, organizations gain a real-time, trustworthy, and actionable customer data foundation—enabling the speed, scale, and personalization essential for modern digital business success.

## Analytics & Reporting

Siebel customers are uniquely positioned for first mover advantages in data activation projects, as they leverage their rich master and transactional Siebel data to transform decades of proven CRM knowledge into intelligent, autonomous capabilities to scale, automate, and innovate with agents. Siebel CRM continues to be a core system for customer data, traditionally with massive transactional data volumes, and we maintain focus on helping customers deriving value from this data through various initiatives.

### Turning Data into Action for Real-Time, Intelligent Business Success

Siebel CRM continues to be a core system for customer data, traditionally with massive transactional data volumes. Our long-term vision for Siebel Analytics is to activate data—transforming raw information into actionable insights that empower organizations to make informed, confident, and timely decisions. By leveraging a unified Oracle technology stack, we are committed to providing comprehensive analytics capabilities that span the full spectrum: self-service visualization, robust data preparation, enterprise reporting, advanced analytics, and AI/ML-driven auto-insights. This approach enables customers to harness the combined power of both their Siebel CRM data and diverse data sources—structured or unstructured, on-premises or in the cloud. We anticipate the following benefits and business value:

- Improve business agility and operational performance with real-time insights, driving faster, more informed decision-making.
- Cut implementation time and maintenance costs through modern, unified data pipelines and no/low-code tools.
- Increase agility and scalability to adapt rapidly to new data sources, business needs, and regulatory requirements without re-architecting core systems.
- Maximize business value from every dataset with extended intelligence AI/ML and segmentation allowing organizations to move from descriptive analytics to predictive and prescriptive actions.

Siebel's Analytics capabilities are designed to flexibly support a range of deployment scenarios—on-premises, cloud, or hybrid—by seamlessly integrating with Oracle's data platforms and third-party systems. Customers can choose the best-fit deployment, bringing together federated data from across their enterprise for a single source of truth. Our investment is focused on deriving value from this data through various initiatives. Customers can migrate from Oracle Business Intelligence Enterprise Edition (OBIEE) to Oracle Analytics Server (OAS) today.

At present, for customers who want to migrate their existing OBIEE solution to OAC our Oracle Consulting Services team has a cost-effective accelerator service.

In 26.6, we have released a pre-built Siebel Analytics solution as a Sample Application is a role-based analytics solution that enables organizations to rapidly deploy enterprise reporting and analytics capabilities for Siebel CRM. The Siebel Analytics Sample Application can work with Oracle Analytics Server (OAS) or Oracle Analytics Cloud (OAC) to provide pre-built analytical artifacts such as ETL, RPDs and data warehouse schemas for Siebel

CRM customers, thereby, helping organizations to gain actionable insights across key business functions such as Sales, Service, and Marketing.

## Oracle Analytics Cloud

### Siebel CRM Integration

Siebel CRM remains the foundational hub for customer data, supporting massive transactional workloads across industries. Our investment is now centered on empowering organizations to unlock actionable insights from this data—quickly, securely, and at scale. To achieve this, we are prioritizing seamless migration and smart integration with Oracle's next-generation analytics platforms. We anticipate the following benefits and business value:

- Accelerate time-to-insight with prebuilt analytics assets and seamless integration.
- Drive better business outcomes faster while lowering total cost of ownership through expanded self-service and augmented analytics across the organization.

Key capabilities of OAC integration:

- **Self-Service Analytics:** Empower business users to independently explore data and derive insights, lowering reliance on IT.
- **Augmented Analytics with Machine Learning:** Enhance analytics with embedded ML for proactive insights and predictive intelligence.
- **Business Scenario Modeling and Visual Analysis:** Enable decision-makers to simulate scenarios, visualize outcomes, and test strategies in an interactive, intuitive environment.
- **Enterprise Reporting:** Deliver robust, scalable, and governed enterprise-wide reporting to meet diverse stakeholder needs.
- **Self-Service and Natural Language Analytics:** Oracle Analytics AI Assistant empowers users to build, refine, and interact with analytics by simply asking questions in natural language, lowering barriers to insight.

With Oracle Analytics Cloud, Siebel CRM customers can fully capitalize on modern, collaborative cloud analytics—enabling real-time, data-driven decision-making that supports today's dynamic business needs and future growth. For more information, refer to [Oracle Analytics Cloud](#).

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

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

|                                             | OBIEE                                            | OAS                                                                                                                                                              | OAC                                                                                                                                                |
|---------------------------------------------|--------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Integration with Siebel</b>              | Yes (Certified)                                  | Yes (Certified)                                                                                                                                                  | Not Certified (Roadmap)                                                                                                                            |
| <b>Key features supported</b>               | Reporting Analytics with Segmentation            | Pixel Perfect Reports<br>Self Service Analytics<br><a href="#">Other Features &amp; OBIEE Comparison</a><br>Segmentation using OAS<br>Analysis Feature (Roadmap) | Governed Analytics (Dashboards & Reports)<br>Self Service Analytics<br>Augmented Analytics<br>Segmentation using OAC<br>Analysis Feature (Roadmap) |
| <b>Cloud / On-Premises Solution</b>         | On-Premises                                      | On-Premises                                                                                                                                                      | PaaS/SaaS                                                                                                                                          |
| <b>Release Versions &amp; Support Dates</b> | <a href="#">OBIEE Versions and Support Dates</a> | <a href="#">Oracle Lifetime Support Policy for Oracle Fusion Middleware Guide</a>                                                                                | <a href="#">OAC Product Updates</a>                                                                                                                |

|                                | OBIEE                     | OAS                                             | OAC |
|--------------------------------|---------------------------|-------------------------------------------------|-----|
| <b>Proposed Migration Path</b> | Migrate to latest OAS/OAC | Upgrade to latest OAS version<br>Migrate to OAC | N/A |

For latest versions supported with Siebel CRM, refer to the [certification matrix](#) on My Oracle Support.

## Customer Experience

**Enable exceptional user outcomes with intuitive and adaptable prebuilt business process solutions.**

Carving a balance between out-of-the-box applications and solutions tailored to the needs of your specific enterprise is a challenge, and one that Siebel is uniquely positioned to aid in. With comprehensive functional support across the full scale of enterprise CRM and tailored industry-specific solutions for 22 industries, all of which are configurable to the unique needs of your business, Siebel is ready to help you meet the edge of innovation.

## Customer Order Management

**Accelerate Fulfillment and Personalization at Scale**

In today's fast-moving markets, organizations must deliver exceptional, tailored customer experiences while ensuring speed and efficiency in order processing. Siebel's upcoming enhancements to Customer Order Management focus on optimizing performance, scalability, and business agility—empowering companies to capture more orders, lower costs, and innovate at the speed their customer's demand. We anticipate the following benefits and business value:

- Reduce time-to-quote and time-to-order, accelerating revenue capture and improving customer satisfaction.
- Empower business teams and IT to collaborate efficiently with enhanced flexibility for product and promotion management.
- Ensure consistently performant user order journeys with scalable, high-performance order management built for the demands of digital transformation.

Key features planned for delivery include:

- Dynamic caching of frequently used products and promotions on remote product configurator to improve response time and performance.
- Ensure the integration with Digital Business Experience Launch is kept up to date as and when new features are released.
- Support converting a quote to multiple sales orders which will allow criteria-based splitting of a quote so integrated systems can fulfill sales orders efficiently rather than working on one large order.
- Searching within the product configurator for products or attributes will help in reducing call-handling time.
- REST APIs and business services for unassisted channels.
- Handling installment pricing for devices.
- Ensure the integration with Rapid Offer Design and Order Delivery (RODOD) is current to the latest release. For more information, refer to the [Communications section](#).

With these innovations, Siebel Customer Order Management is poised to deliver increased speed, deeper personalization, and operational excellence—fueling growth, loyalty, and improving customer experience.

## Loyalty

### Drive Lasting Engagement in Evolving Market Dynamics

Oracle's Siebel Loyalty continues to set the standard as a robust, enterprise-grade platform designed for performance, scale, and flexibility—empowering organizations across industries to design, manage, and optimize loyalty programs that drive customer acquisition, engagement, and retention. Whether deployed on-premises, via OCI, or enhanced with Oracle CrowdTwist for experiential engagement, Siebel Loyalty is built to adapt to your unique business needs and evolving market dynamics. Siebel Loyalty continues to provide long-term business value:

- Drive higher member engagement, advocacy, and retention through intelligent, tailored experiences.
- Increase loyalty program efficiency, agility, and compliance with simplified administration and actionable analytics.
- Support scalable growth, rapid deployment, and seamless integration with existing enterprise systems.

Key features planned for delivery include:

- **Intelligent Loyalty Promotion Generation**

Harness generative AI to configure compelling promotions in natural language - reducing time, effort, and complexity for loyalty administrators, and enabling continuous innovation in member engagement strategies.

- **Member Referral Program**

Empower members to generate and share referral links, seamlessly enrolling new contacts and boosting program reach while rewarding loyal advocates.

- **Point Expiry Notification**

Proactively notify members of pending point expirations, encouraging timely engagement and redemption activity.

- **Advanced Loyalty Promotion Features:**

- **Promotion Frequency Cap**

Prevent misuse by capping rewards on repetitive activities within customizable timeframes.

- **Promotion Effectiveness Analytics**

Gain real-time insights into promotion impact, enabling data-driven campaign optimization.

- **Seamless Promotion Migration**

Easily migrate tested promotions across environments with streamlined, one-click export/import flows.

- **Enhanced API Integrations:**

- **Member Merge REST API**

Programmatically consolidate member accounts for cleaner data management.

- **Member Association/Disassociation REST API**

Flexibility to manage member relationships with households or corporate accounts to support dynamic program models.

Siebel Loyalty's ongoing innovations enable organizations to respond dynamically to changing customer expectations—delivering memorable, rewarding loyalty experiences while maximizing operational efficiency and program performance.

## Siebel Email Marketing

### Expanding Security with OCI Email Delivery Service

As digital marketing evolves, organizations need robust, flexible, and secure email delivery infrastructure to maximize engagement and campaign success. Siebel Email Marketing is advancing with new authentication capabilities, ensuring seamless integration with Oracle Cloud Infrastructure (OCI) Email Delivery Service and broader compatibility with modern SMTP standards.

Features planned for delivery include:

- **Modern Authentication Flexibility**

The Email Sending Daemon (ESD) in Siebel Email Marketing will support the AUTH PLAIN authentication mechanism, in addition to the existing AUTH LOGIN method. This enhancement broadens SMTP compatibility and enables direct integration with OCI Email Delivery Service for outbound marketing campaigns.

- **Adaptable Authentication Scenarios**

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

With expanded authentication support and integration with OCI Email Delivery, Siebel Email Marketing empowers organizations to deliver effective, secure, and high-volume email campaigns on the latest cloud infrastructure—enhancing marketing reach and operational flexibility.

## Industry Solutions

### Powering Next-Generation, Industry-Driven Digital Excellence

Siebel CRM stands as a gold standard for industry CRM platforms, distinguished by its extensive applications, robust data models, and business processes refined through decades of industry experience. As customer expectations, CX strategies, and technology stacks advance, our commitment is to lead customers through this evolution—delivering modernized, scalable industry solutions that seamlessly connect enterprise front- and back-office operations. We anticipate the following benefits and business value:

- Accelerate time-to-value with out-of-the-box best practices and compliance.
- Achieve operational agility and regulatory confidence more rapidly with field-proven business processes.
- Maintain future readiness by adopting new technology and digital workflows as industry demands evolve.

Key differentiators:

- **Industry Best Practices, Proven at Scale**

Siebel CRM incorporates extensive, industry-specific workflows and domain models, built to support complex business scenarios and regulatory requirements—ensuring organizations can deploy quickly and operate with confidence.

- **Full-Stack Modernization and Interoperability**

Our ongoing investments in architecture, APIs, and cloud integration provide customers the flexibility to

modernize at their own pace. Seamless interoperability allows you to orchestrate end-to-end business processes across your technology landscape, blending Siebel's industry depth with Oracle's broader CX and ERP portfolio.

- **Future-Ready Innovation**

We continue to expand and enhance our industry solutions with new digital capabilities—ranging from AI-driven insights and automation to omnichannel engagement. Customers benefit from industry-specific accelerators, compliance features, and continuous updates that keep solutions both current and competitive.

With Siebel CRM Industry Solutions, organizations are equipped to lead their markets with trusted, modern, and fully interoperable digital platforms, laying the foundation for sustainable growth and customer-centric innovation.

## Communications

### Innovate End-to-End Digital Business Experience

Oracle's Digital Business Experience for Communications sets a new benchmark for agility, intelligence, and scale, empowering Communication Service Providers (CSPs) to manage the complete customer lifecycle—from concept to cash to care—efficiently and cohesively. Designed to eliminate process fragmentation and operational silos, this solution enables CSPs to deliver compelling customer journeys, launch offers rapidly, and maintain full control across public cloud, private cloud, and on-premises deployments.

Key benefits include:

- Accelerate time-to-market for new offers with intuitive, intelligence-driven design tools and productized integrations.
- Drive proactive, tailored engagements at every stage of the journey with 360° customer and product data, advanced analytics, and GenAI.
- Unlock operational agility & efficiency through unified omnichannel processes that leverage modern, cloud-native tools and optimized resource allocation.
- Ensure business resiliency and scalability by adopting a full-featured, configurable solution that seamlessly integrates with emerging technologies and evolving business models.

Leveraging proven, communications-specific capabilities and built on industry standards, Digital Business Experience integrates:

- **Launch Experience** as a centralized, open product catalog for dynamic, enterprise-grade offer design and lifecycle management, enabling rapid, low-code modeling and instant, synchronized publishing to ordering and monetization systems.
- **Siebel CRM** as the omnichannel transaction engine, enabling seamless, guided customer engagement and accurate, unified quote-to-order capture across assisted and unassisted channels.
- **Order Service Management (OSM)** for agile orchestration of order fulfillment, with real-time validation and resource reservation to ensure seamless delivery.
- **Billing and Revenue Management (BRM)** to monetize any business or billing model—from prepaid subscriptions to complex, event-driven billing—across all network generations.
- **Open Digital Architecture** to deliver seamless business process integration, leveraging open TMF APIs and TMF ODA-aligned architecture for unmatched extensibility and interoperability.

Key features planned for delivery include:

### Insight-Driven B2B Sales Experience: Quote-to-Order

- **Sales Dashboard Screen:** Comprehensive, real-time dashboard providing sales teams with actionable insights, including pipeline status, recommended next steps, and goal tracking all in one consolidated view.
- **Smart Lead & Opportunity Management:** AI-driven lead scoring, predictive forecasting and Gen AI insights. Analytical 360-degree view of sales data with conversational dashboards to drive informed decision-making and accelerate growth.
- **Conversational User Experience:** Intuitive, insight-driven experience for B2B sales teams, with smart actions, semantic product search, intelligent CPQ, contextual recommendations, and mobile-first design for remote productivity.
- **Modern Search and Analytics:** Advance global search across all objects, RAG and 23ai vector search, plus search videos and images, and seamlessly integrate with reporting and analytics for data-driven insights.
- **Agentic AI:** AI agents for Opportunity Management, CPQ, Proposal, and Ordering. Anchor your Gen AI agents in domain intelligence with Siebel's expert model.

#### AI Sales Assistant for Automated Sales Tasks

- **AI Agent Guided Sales Journey:** AI Assistant that proactively leads the order capture process on behalf of the CSR, presenting recommended actions and collecting agent input and validation at each step to ensure accuracy and efficiency.
- **Automated Customer Insights:** AI surfaces relevant customer information, preferences, and history in real time, prompting the agent only when review or input is needed for personalized engagement.
- **Real-Time Offer Recommendations:** Assistant that continuously analyzes data to suggest the most relevant products and services, presenting options to the agent for quick validation, maximizing upsell and cross-sell potential with minimal manual effort.
- **Seamless Workflow Integration:** Agentic AI to manage end-to-end workflows including catalog browsing, add-to-cart and order capture, engaging the agent for essential decisions, input, or exceptions, significantly reducing manual workload and enabling faster customer responses.

#### Intuitive Subscription Management for Agent Productivity

- **Seamless Subscription Management:** Easily initiate and manage Move, Add, Change, and Disconnect subscription requests through an intuitive conversational Redwood UX designed to reduce manual effort and order cycle time.
- **Data-driven Personalized Insights:** Get tailored recommendations that enable agents to resolve inquiries efficiently and effectively, backed by intelligent insights on key customer metrics, including: CLTV, Churn Score and Credit Rating.
- **End-to-End Process Automation:** Accelerate order delivery with automated workflows that ensure accurate order validation, provisioning, and billing fulfillment - potentially reducing errors and rework across the MACD lifecycle.

Oracle Communications Digital Business Experience gives CSPs the unified, intelligent, and scalable foundation needed to meet the demands of today's hyper-competitive marketplace—accelerating growth, deepening customer loyalty, and maximizing operational excellence from concept to care.

## Life Sciences

### Advance Clinical Trials Operational Excellence and Compliance

Oracle's Siebel Clinical Trial Management System (CTMS) is the industry gold standard for managing the full clinical trial lifecycle, empowering sponsors, CROs, and research teams to streamline study operations at scale while ensuring compliance, data integrity, and speed to market. Built for performance, regulatory rigor, and flexibility, Siebel CTMS enables organizations to meet today's complex research demands and rapidly adapt as requirements evolve.

Key benefits:

- Maximize operational agility and site productivity while reducing compliance risks.
- Enhance CRA efficiency and effectiveness through real-time, flexible reporting—online or offline.
- Support timely, informed strategic decisions using data-driven trial oversight and analytics.

Siebel CTMS differentiators:

- **Comprehensive, Integrated Trial Management**  
Standardizes and automates workflows for planning, monitoring, and managing clinical trials, resulting in operational efficiency and real-time oversight across multi-site studies.
- **Actionable, High-Quality Data**  
Delivers configurable workflows to support specific customer processes, ensuring data consistency, audit readiness, and support for diverse study designs.
- **Seamless Analytics and Reporting**  
Integrates with advanced analytics platforms, delivering timely, fact-based insights to guide informed decision-making and drive trial success.
- **Site Visit and Trip Report Excellence**  
Offers robust site monitoring and trip reporting features, supporting Good Clinical Practice (GCP) requirements and maximizing productivity for clinical research associates (CRAs).

Key enhancements include:

- **Enhanced Mobile Trip Report Capabilities**  
New online and offline features for trip reporting, including attendee and comment capture, embedded SmartScript logic for dynamic questionnaires, subject status snapshots, and streamlined navigation.
- **Reliable Offline Access**  
Ensures CRAs can complete site visit trip reports regardless of Wi-Fi or cellular connectivity—whether onsite at remote clinics or in transit, ensuring continuous productivity, data completeness, and regulatory compliance.
- **Modern Usability**  
Ongoing adoption of the Siebel Open UI framework and Redwood UX delivers a richer, more intuitive user experience on all devices, accelerating both new user onboarding and daily operational efficiency.

With Siebel CTMS, organizations gain a powerful, end-to-end platform to standardize, optimize, and future-proof clinical trial management—ensuring faster, higher-quality, and more compliant research from study start to finish.

For more information on Siebel Clinical Trial Management, refer to [Siebel Clinical Trial Management System](#).

## Platform & Operations (Developers, Architects, & Operators)

As digital business accelerates, Siebel CRM is dedicated to delivering a robust, high-performance, and scalable platform that empowers organizations to operate efficiently at web-scale. Innovations in this theme reduce total cost of ownership (TCO), maximize system uptime, and ensure Siebel remains the backbone for mission-critical, data-intensive applications—now and into the future.

### Developer Experience

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

### Web Tools & Workspaces

#### Empowering the Next Generation of Siebel Development

Our commitment is to deliver a robust, modern Web Tools environment that replicates and surpasses the full functionality of traditional Siebel Tools. As Web Tools matures, we are focused on enhancing developer experience, enabling rapid, low-risk innovation, and supporting seamless configuration management—all while minimizing operational downtime. We anticipate the following benefits and business value:

- Increase developer productivity and reduce learning curves with intuitive, modern tools.
- Minimize configuration and migration risk, ensuring business continuity and accelerated time-to-market.
- Enable Agile and DevOps best practices for accelerated transformation and continuous delivery.

#### Web Tools Developer Experience enhancements:

- **Applet Editor Usability:** Streamlined, more intuitive Applet Editor accelerates configuration and reduces errors.
- **Visual Workflow Comparison:** Simplify the resolution of changes with side-by-side visual comparisons of Workflow Processes and Tasks—making integration of customer and Oracle updates faster and less error-prone.
- **Natural Language Configuration (“Developer Assistant”):** GenAI-powered natural language configuration to help developers work faster, allowing them to describe requirements and receive suggested configurations or code.
- **Concurrent Processing of Sub Processes:** Parallel execution of critical workflow steps reducing processing time and supporting higher transaction volumes without compromising on accuracy or reliability.

#### Workspaces enhancements

- **Workspace Enablement:** Expanded support for Manifest Administration, Manifest Expressions, Manifest Files, Predefined Queries, EAI Data Maps, Data Maps, List of Values and Responsibility management will ensure developers and administrators have unified, flexible tools to manage configurations at scale.

With these innovations, Web Tools & Workspaces will become the hub for future-ready Siebel CRM development—delivering flexible, intelligent tooling for teams to build, manage, and migrate solutions faster and with greater confidence.

## Siebel Developer Assistant

### Supercharge Developer Productivity and Quality

Accelerating innovation while maintaining high implementation quality is essential for modern enterprises. We believe AI will play a crucial role in reimagining the Siebel developer experience by helping teams understand existing configurations, reason over dependencies, plan changes, and execute approved updates with greater confidence.

Our objective is to abstract Siebel concepts and make them readily accessible through AI, enabling developers to build enterprise applications on Siebel more intuitively and in a manner aligned with modern agentic development experiences.

To support this, Siebel will provide the tooling required to bring Siebel development capabilities into modern AI development environments. We plan to deliver **Agent Instructions**, **Agent Skills**, and a **Developer MCP Server** that enables AI coding assistants to understand Siebel concepts, apply approved implementation patterns, and securely interact with governed Siebel development capabilities. This will enable customers to use their preferred AI development environment while leveraging Siebel-specific knowledge and tooling through open standards.

Anticipated benefits with this approach include:

- Reduce the time required for developers to understand existing Siebel implementations, configurations, and dependencies.
- Accelerate implementation by translating developer intent into guided, reviewable implementation plans and approved configuration changes.
- Improve implementation quality through validation, traceability, and human-supervised execution.
- Reduce onboarding efforts for new developers by making Siebel concepts and implementation guidance readily accessible through AI.
- Improve delivery consistency across Siebel projects by promoting reuse of proven implementation patterns and governed development practices.

Key capabilities include:

- **AI-assisted discovery:** Help developers explore Siebel artifacts, configuration metadata, relationships, and dependencies.
- **Configuration documentation:** Generate summaries and reusable documentation for existing Siebel configurations.
- **Change planning:** Translate natural language intent into structured, reviewable implementation plans.
- **Guided configuration:** Assist with approved configuration changes through governed Siebel AI tools.
- **Validation and guardrails:** Support safer execution through workspace boundaries, traceability, and human oversight.
- **Portable developer experience:** Enable Siebel intelligence to work across modern agentic development environments such as Codex by bringing intelligent assistance into Siebel development. The Siebel Developer Assistant aims to help teams deliver high-quality enhancements faster, with stronger governance, better traceability, and reduced implementation risk.

## Test Automation

### Accelerate Quality and Agility

Siebel CRM is committed to empowering organizations with modern, agile development practices. By continuously enhancing the Open UI Test Automation framework, we enable adoption of test-driven development (TDD) methodologies—ensuring robust, reliable, and cost-effective releases as part of a seamless agile workflow. Whether it's making internal updates to your Siebel CRM deployment, or applying a Monthly Update, the ability to automate functional and regression testing can see a dramatic improvement in quality and reduction in TCO. We anticipate the following benefits and business value:

- Reduce production issues and post-deployment support costs with higher quality for every release.
- Increase development agility by embedding automated testing earlier and more deeply in the software lifecycle.
- Accelerate time-to-market while minimizing risk by enabling rapid, reliable innovation.

Key features planned for delivery include:

- **AI Test Automation Assistant**

Accelerates quality engineering by using natural language descriptions of test scenarios to automatically configure Siebel for test automation, generate no-code keyword-driven test scripts, and execute them for validation. By lowering the learning curve, it enables developers, business analysts, and test engineers to contribute to test automation, expanding coverage, accelerating validation of functional changes, building comprehensive regression suites, and speeding up high-quality Siebel CRM releases.

- **Test Script Versioning with Workspaces**

Enhances Siebel Test Automation with support for versioning test scripts using Siebel Integration Workspaces. It enables teams to develop, validate, and manage automated test scripts alongside application features within workspace branches, keeping test automation aligned with application changes. This reduces regression risk during code promotions and supports faster, higher-quality Siebel CRM releases.

- **Cross-Platform Execution with Oracle Linux and Containers**

Extends Siebel Test Automation to run automated test suites on Oracle Linux in addition to Windows, with support for containerized deployment. This enables customers to deploy and scale test execution on Oracle Cloud Infrastructure (OCI), Kubernetes, and other container platforms, seamlessly integrate automated testing into modern CI/CD pipelines, improve resource utilization, reduce infrastructure and operational costs, and accelerate high-quality Siebel CRM releases.

With ongoing innovation in the Siebel Test Automation framework, Siebel CRM empowers organizations to confidently scale agile, test-driven development across their enterprise—delivering high-quality software, faster and at lower total cost.

## Enterprise AI

Our objective is to provide the capabilities required to seamlessly embed AI into Siebel CRM business processes and also enabling them to participate in Agentic AI use cases across the enterprise. We have already delivered a Siebel AI framework that enables customers to configure a broad range of AI and Generative AI use cases within your Siebel CRM deployment. In addition, Siebel CRM supports Retrieval-Augmented Generation (RAG) capabilities and the Oracle Database 26ai deployment.

Consistent with our overall platform strategy, our approach to Agentic AI is centered on configurability and customer choice, enabling organizations to select the technologies they prefer and determine where Agentic AI experiences should be surfaced. We plan to deliver the foundational building blocks required to enable Agentic AI

use cases within Siebel, as well as the capabilities needed to expose Siebel business processes for orchestration by Agentic AI applications initiated from any channel across the enterprise.

## Agentic AI

### Enable Agentic AI for the Enterprise. Trusted foundations to build, deploy, and orchestrate AI Agents

As organizations adopt AI agents across the enterprise, they need a secure and standardized way for those agents to interact with enterprise business systems. Siebel CRM will provide the foundational capabilities required to expose Siebel business functionality to AI agents, integrate AI agents with enterprise workflows, and surface AI-assisted experiences within the Siebel application.

These capabilities will be built on open standards, such as the **Model Context Protocol (MCP)** and **Agent-User Interaction (AG-UI) Protocol (AG-UI)**, enabling interoperability between Siebel CRM and enterprise AI platforms. This approach will allow customers to build AI agents using the runtime, orchestration framework, and Large Language Models that best fit their enterprise architecture, while continuing to leverage the business services, workflows, APIs, security model, and governance already established within Siebel.

The same platform capabilities will also underpin Oracle-delivered AI solutions built on the Oracle AI architecture. These out-of-the-box solutions, including the Telco Sales Assistant, Service Assistant, and Loyalty Promotion Assistant, demonstrate how the platform can be used to deliver end-to-end business scenarios. Customers can deploy these solutions as delivered, extend them to meet their own requirements, or use the same capabilities to build their own agentic solutions using Oracle AI or their preferred AI platform.

Organizations will be able to:

- Expose trusted Siebel business processes as reusable AI tools for consumption by enterprise AI agents.
- Build and deploy AI solutions using Oracle-delivered capabilities or the AI technology stack of their choice.

Surface AI agents within Siebel CRM to enable seamless human-agent collaboration in the context of existing business processes. Key features planned to enable the above include:

## Siebel AI Connectors

Siebel AI Connectors will provide a standard, governed mechanism for exposing Siebel CRM capabilities to enterprise AI systems using the **Model Context Protocol (MCP)**.

Model Context Protocol (MCP) has emerged as the leading open standard for integrating enterprise applications with AI agents. By standardizing how enterprise capabilities are exposed as reusable tools, MCP enables AI agents to securely discover and invoke business functionality across heterogeneous systems. Siebel AI Connectors adopt MCP as the standard interface between Siebel CRM and enterprise AI platforms.

Built on **Siebel Open Integration**, Siebel AI Connectors leverage Open Integration's ability to expose Siebel objects, Business Services, and Workflow Processes using REST and builds on this foundation by allowing organizations to selectively transform these REST APIs into a curated catalogue of reusable AI tools that can be securely exposed to AI agents.

Customers will be able to maintain a centralized catalogue of reusable Siebel AI tools through a no-code/low-code, configuration-driven experience. Organizations define AI tools once by selecting the Siebel business capabilities they want to expose and reuse those tools across AI use-cases. The Siebel AI Connector framework enables these tools to be composed into one or more customer-managed MCP Servers for different business scenarios, eliminating the need to build custom integrations for each AI solution. Planned enhancements include:

- **Tool Configuration Experience:** a no-code/low-code experience for defining and managing reusable AI tools from existing Siebel capabilities.

- **Tool Lifecycle Management:** Validate, Publish and Manage AI tools throughout their lifecycle.
- **Siebel MCP configuration & deployment:** Composition and deployment for customer-managed MCP servers using our configuration-based runtime.
- **Enterprise Security:** Seamless Integration with existing Siebel authentication, authorization, and governance.

## Conversational User Experience

Conversational User Experience will provide a standard interaction framework for integrating AI agents into Siebel CRM. Built on the open **Agent User Interaction (AG-UI)** standard, the framework enables organizations to integrate AI agents built using Oracle AI or their AI platform of choice while providing a consistent interaction model within the Siebel application.

The framework enables one or more AI agents to be embedded directly within Siebel CRM, providing a common experience for agent discovery, context sharing, bidirectional communication, and human-agent collaboration. This allows AI agents to participate in existing Siebel business processes while securely interacting with approved Siebel business capabilities based on user intent.

Key features planned for delivery include:

- **Embedded Conversational Shell:** A reusable conversational experience that can be embedded across Siebel applications and business processes.
- **Multi-Agent Framework:** Register, discover, and manage one or more AI agents within the Siebel application, allowing different assistants to support different business scenarios.
- **Context Bridge:** Exchange application context, user interactions, and business state between Siebel CRM and AI agents to enable context-aware interactions.
- **Action Framework:** Standard interaction contracts that allow AI agents to securely invoke approved Siebel business capabilities and receive application updates.
- **Session Management:** Maintain assistant identity, conversation history, and session continuity across user interactions.
- **Human-in-the-Loop Framework:** Built-in interaction patterns for user input, approvals, confirmations, and other review points before AI agents execute business actions.

[https://docs.oracle.com/cd/G15000\\_01/SiebelInfoPortal/siebel\\_genie\\_recipe.html](https://docs.oracle.com/cd/G15000_01/SiebelInfoPortal/siebel_genie_recipe.html)

## Integrations

### Enabling Openness, Flexibility, and Future-Ready Connectivity

As enterprises continue to expand their digital ecosystems, integration flexibility is paramount. Siebel CRM's integration strategy is focused on delivering open, standards-based, and highly performant interfaces—enabling seamless interoperability across a wide range of systems, channels, and architectures. Our commitment is to ensure Siebel CRM remains at the heart of your enterprise, empowering rapid innovation, scalability, and business agility.

## Rest API

### Enhanced Control, Performance, and Extensibility

Siebel REST APIs offer easier, faster, and more flexible integration with other enterprise systems, mobile apps, and cloud services, while providing better performance, scalability, and security. They play a foundational role in modernizing Siebel CRM and enabling digital transformation.

Features planned for delivery include:

- **Customizable HTTP Error Codes**

More granular control over the response codes returned from inbound REST requests empowers customers to tailor integrations and error handling to their operational needs.

## Event Pub / Sub Framework

### Real-Time, Flexible Enterprise Integration

Kafka brings robust scalability, resilience, and flexibility to Siebel integrations, enabling real-time event-driven use cases, reducing integration complexity, and helping organizations modernize their Siebel CRM environments.

Features planned for delivery include:

- **Dead Letter Queue**

Enhanced support in handling failures while processing the events as a consumer. Upcoming enhancements include native support for Kafka partitions and failover.

As industry CX becomes increasingly data driven and customer-centric, APIs allow for greater versatility, innovation, and openness. By advancing its REST APIs and event-driven frameworks, Siebel CRM ensures secure, performant, and future-proof connectivity across the enterprise—supporting rapid change, robust ecosystems, and lasting competitive differentiation.

## Siebel Open Integration

### Empowering Omnichannel, Headless, and Modern Digital Transformation

As digital enterprises embrace omnichannel experiences and cloud-native architectures, Siebel CRM is evolving to align with MACH (Microservices, API-first, Cloud-native, Headless) principles. The new Siebel Open Integration framework released in 25.12 is at the heart of this evolution—making Siebel a truly open, flexible, and headless platform that empowers organizations to orchestrate seamless, differentiated customer journeys through modern APIs and microservices. We anticipate the following benefits and business value:

- Reduce integration and customization effort with open, model-based options to extend, connect, and securely expose enterprise logic wherever it is needed.
- Drastically reduce technical debt while ensuring consistency and governance by allowing existing business rules and processes to be consumed or reused.
- Unlock intelligent, AI-augmented automation by providing direct access to Siebel's trusted data and workflows for next-gen digital solutions.

Key features delivered include:

- Exposing Siebel artifacts as REST APIs that mirror Siebel's deep business logic, allowing customers to create custom interfaces, digital channels, and app mashups—well beyond the original Siebel Open UI framework.

- Leverages existing applets, views, business services, and workflow processes (both delivered and customized artifacts) as REST endpoints. Business rules and UI-level processes developed over years are now accessible outside Siebel UI—without re-coding or accruing technical debt.
- Enhancement of Open Integration released in 26.6 enables organizations to now Easily compose, transform, and orchestrate Siebel business processes as APIs. This will enable support for industry-standard transformations (e.g., TMF APIs for Telecommunications) and business event-based orchestration drives agile integration with any partner or system.
- Enhancement delivered in 26.6 enables seamless support for event publication and consumption (including Kafka, Pub/Sub, IoT, and runtime triggers) alongside synchronous and asynchronous REST callouts, maximizing architectural flexibility.

Siebel Open Integration now enables Siebel as a Headless platform, thereby enabling customers to accelerate their modernization journey, deliver seamless omnichannel experiences, and maximize the strategic value of core Siebel CRM investments for years to come.

Features planned for delivery include:

- A process designer to enhance developer experience. This is envisaged to deliver design time experience through a User Interface such as ability to publish the design time version of process flow as runtime with versioning capability to dev, test, preprod and prod through a wizarding process.
- This will be supported by an Agent based developer assistant to drive design time development.
- A unified API Catalogue which will unify APIs exposed from multiple Open Integration instances.
- Enhanced Runtime Experience such as ability to rollback to desired runtime version.
- Observing and Monitoring Capability.
- Enhance Performance and Scalability.
- Support for Outbound Attachments in Open Integration REST APIs.
- Support for Webtools API to support Developer Assistant which will drive developer productivity.
- Ability to support various encoding/decoding standards.

We also will deliver an Open Integration Agent Skill along with a sample application and a white paper detail on building the sample application using the Agent skill.

## Deployment & Operations

The Siebel CRM application is now easier than ever to maintain and update, with deployment choices and tooling to manage Siebel CRM in the cloud while embracing cloud native platform technologies. Our continued focus on agility enables enterprises to adapt to business challenges quicker than ever.

We continue to reduce downtime by providing capabilities to make all manner of updates to the application in real time. Our roadmap supports the ability to operate Siebel CRM as a modern standalone application or as part of wider industry cloud solutions with the same architecture and operational efficiencies at extreme scale. Siebel will also transform from a 32-bit application to a 64-bit application, enabling access to the memory, performance, and security enhancements of 64-bit execution. We align to [cloud native principles](#) and best practices to enhance application operations and reduce TCO across all functions of DevOps - continuous integration and continuous delivery (CI/CD).

Features planned for delivery include:

- **Accelerated deployment and environment readiness**

Future enhancements to improve Siebel server and component restart times, helping environments become available faster after deployment, configuration changes, or maintenance activities. This can reduce operational waiting time and support more efficient environment readiness.

- **Performance-safe logging**

Enhanced Siebel logging to support detailed and elevated log levels without materially impacting transaction processing, throughput, or response time. This can help make deeper application behavior, business state, and system health information continuously available for analysis, including AI-assisted monitoring, diagnosis, and recommended actions.

- **OpenTelemetry compliant Siebel application metrics**

Planned enhancements to provide OpenTelemetry-compliant application metrics with REST API support. This can help customers capture consistent, structured telemetry from Siebel environments and integrate it more easily with enterprise observability platforms (including those supplied together with Siebel), dashboards, and AI-assisted operations. By potentially bypassing Server Manager for metrics collection, this approach can also support more frequent, performance-safe data collection without adding unnecessary overhead to core application operations.

- **OpenTelemetry compliant distributed tracing**

We plan to emit OpenTelemetry-compliant distributed tracing, helping customers follow transactions across Siebel application components and supporting services. This can improve visibility into where time is spent, where errors occur, and how application components interact.

By aligning with OpenTelemetry, tracing data can integrate more easily with enterprise observability and AIOps tools, supporting faster diagnosis, richer AI-assisted analysis, and more effective operational response.

## Siebel Cloud Manager

### Delivering Cloud-Native Agility, Resilience, and Efficiency

Siebel Cloud Manager (SCM) is at the forefront of Oracle's commitment to transform Siebel CRM into a truly cloud-native platform—meeting the evolving demands of modern digital business. Our long-term vision is to empower organizations to deploy, operate, and scale Siebel CRM with unprecedented agility, reliability, and cost-efficiency, while freeing developers to innovate and deliver value, fast. SCM delivers the following benefits and business value:

- Minimize infrastructure costs and support business growth on demand with dynamic scalability.
- Proactively minimize risk and reduce manual intervention with built-in monitoring, recovery, and update mechanisms.

Key features planned for delivery include:

- **Auto-Scaling with Kubernetes**

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

- **Smooth monthly update process**

Enhancements to Siebel CRM deployments on Kubernetes are planned to support a smoother, more automated monthly update experience, where updates can be applied in a controlled and repeatable way with minimal manual intervention. Instead of treating each update as a complex, high-risk activity, Siebel Cloud Manager is expected to help manage the process more like a guided “black box” operation, coordinating update steps behind the scenes while keeping the deployment predictable and manageable.

Planned rollback capabilities are expected to further strengthen confidence by helping administrators recover more easily if an update encounters issues, minimizing disruption to business users and operations teams. The intended result is a more resilient monthly update model that improves operational efficiency, reduces downtime risk, and helps organizations stay current with greater confidence.

- **Deployment of pipeline for distributed tracing data**

Siebel is planned to support a deployment pipeline for distributed tracing data, composed of standards-compliant, cloud-native tooling such as Jaeger. This can help customers collect, route, visualize, and analyze trace information from Siebel application components using familiar observability patterns.

The intended benefit is a more complete path from trace generation to actionable insight. Customers can use this pipeline to support faster troubleshooting, better performance analysis, and more continuous visibility into end-to-end Siebel transaction behavior.

As enterprises demand increasing agility and resilience from mission-critical applications, Siebel CRM is modernizing its operational platform to fully leverage cloud-native technologies. With advanced Kubernetes capabilities, organizations can achieve unprecedented scalability, high availability, and deep operational visibility, ensuring Siebel CRM scales dynamically with business needs while maintaining performance and continuous uptime.

Siebel Cloud Manager enables organizations to modernize, operate, and future-proof their Siebel CRM environments, achieving superior agility, efficiency, and value in a cloud-centric world, all while reducing operational risk and embracing scalable, secure cloud-native practices.

## Proactive Monitoring and Intelligent Diagnostics

### Next-generation Monitoring and Diagnostics solution

Siebel Monitoring & Diagnostic Console (SMDC) will provide a unified console for monitoring system health, analyzing logs, and gaining insights into application performance and business operations across cloud, OCI, and on-premises deployments. By combining modern observability with AI-assisted diagnostics, SMDC can help organizations proactively monitor, diagnose, and optimize their Siebel environments.

SMDC will enhance operational efficiency by enabling organizations to move from reactive troubleshooting to proactive operations. It will provide unified visibility across metrics, logs, and traces, automates health diagnostics, and leverages AI to accelerate root cause analysis and issue resolution. This helps reduce downtime, improve system reliability, and deliver better user experience.

Key capabilities:

- **Deployment-Agnostic Architecture**

Supports Siebel deployments across OCI, cloud, and on-premises environments with secure, role-based access.

- **Server Monitoring Dashboard**

Real-time visibility into Siebel Server health, resource utilization, and system availability.

- **Application Insights Dashboard**

Unified insights into application performance, user experience, and business operations.

- **Crash Analyzer**

Automates crash evidence collection and analysis for faster, more consistent root cause identification.

- **Log Analyzer**

Correlates and analyzes Siebel logs to simplify troubleshooting and speed issue resolution.

- **AI Assistant**

Delivers AI-powered diagnostics, root cause insights, and actionable recommendations based on system health and diagnostic data.

## Upgrades & Updates

### Ensuring Continuous Innovation, Security, and Compatibility

In a rapidly evolving digital landscape, keeping enterprise applications current is essential for security, compatibility, and ongoing innovation. Oracle's commitment to Siebel CRM customers is to simplify upgrades and updates—reducing cost, risk, effort and business disruption while maximizing the benefits of new features and ongoing compliance. We anticipate the following benefits and business value:

- Increase uptime and business continuity by adopting new features and critical fixes without interrupting business operations via downtime.
- Reduce TCO for long-time customers by reducing the risk and complexity of Upgrades from older releases.

### Siebel Upgrades (One-Time Upgrade, Pre 2017)

Key features planned for **Upgrades** include:

- **Customer-Centric Upgrade Merge Process** – Reimagining the repository merge process around the customer's repository, preserving customizations while intelligently incorporating new Siebel innovations. This customer-first approach minimizes reconciliation effort, reduces upgrade complexity, and enables faster adoption of new releases with greater confidence.
- **Enhanced Handling of Sequence Objects** – Improving upgrade intelligence for sequence-based repository objects to reduce conflicts and streamline merge activities.
- **Improved Boolean Attribute Processing** – Delivering more consistent and reliable handling of Boolean attributes during upgrades, reducing reconciliation effort and improving upgrade quality.

### Siebel Updates (Simple Updates, 2017+)

Key features planned for **Updates** include:

- **Update Assessment Insight Assistant** – Providing richer insights and actionable guidance to help customers better understand update readiness, impact, and planning requirements.
- **Resume Capabilities** – Increasing resilience by allowing interrupted update processes to resume from the point of failure, reducing recovery time and operational risk.
- **Enhance Repository Merge process** – Reliable handling of Boolean attributes and Sequences during repository update process.
- **Simplified Update Documentation** – Delivering clearer, streamlined guidance that makes updates easier to plan, execute, and validate.
- **Update Benefit Assistant** – Providing visibility into the features, enhancements, and business value delivered with each update, helping customers maximize the return from staying current.

With these enhancements, Siebel CRM delivers a future-ready upgrade path that ensures organizations remain secure, compatible, and on the leading edge of digital transformation—today and into the future.

## Data Archival

### Intelligent, Secure, and Flexible Data Lifecycle Management

With the foundational data archival capabilities outlined in last year's Statement of Direction now delivered, we plan to continue enhancing archival flexibility and deployment choice, with a focus on broader platform support, cloud-ready storage options, simplified operations, and controlled data restoration. These enhancements are intended to help customers archive data confidently and provide the following business value:

- Sustain Siebel application performance and scalability as transactional data volumes increase.
- Reduce storage and infrastructure costs through targeted archival and lifecycle management.
- Improve operational flexibility by supporting additional source and target platforms.

This year's direction builds on last year's foundation by extending data archival to more deployment scenarios and operational models. Our focus is to make archival easier to adopt, more flexible to operate, and better aligned with modern infrastructure strategies, including cloud object storage, Microsoft SQL Server environments, containerized deployment, and restoration of archived data when business, audit, or compliance needs require it.

Key enhancements planned for delivery include:

- **Support for OCI Object Storage as an archival target:** Enable customers to archive Siebel data to OCI Object Storage, helping support cost-effective, scalable, and cloud-ready long-term retention strategies.
- **Support for Microsoft SQL Server as a source database:** Extend data archival capabilities to Siebel CRM deployments using Microsoft SQL Server, broadening platform coverage and enabling more customers to adopt data archival.
- **Containerized deployment through Siebel Cloud Manager:** Simplify installation, configuration, and operational management of data archival components through containerized deployment using Siebel Cloud Manager.
- **Data restoration capabilities:** Provide the ability to restore archived data when required, supporting operational recovery scenarios while maintaining appropriate controls.

With continued investment in data archival, Siebel CRM customers can keep their production systems responsive, cost-effective, and governed while retaining the ability to securely preserve and restore important historical information as business needs evolve.

## Platform & Certification Updates

### Enabling Flexibility, Security, and Scalability for the Future

Oracle is committed to ensuring Siebel CRM remains at the forefront of enterprise technology by proactively expanding platform certifications and embracing industry standards. Our planned certification and platform exploration areas are intended to help customers maintain secure, supported, and future-ready Siebel CRM deployments across on-premises, cloud, and hybrid landscapes.

Upcoming platform and certification focus areas include:

**Transformation to 64-bit Siebel Architecture:** We plan to transform Siebel from a 32-bit application to a 64-bit application to support future scalability, performance, memory utilization, and platform modernization objectives.

**Linux 10 Certification:** Certification of Siebel CRM with Oracle Linux 10 is planned to help customers remain current with enterprise Linux platform evolution, security updates, and infrastructure modernization requirements.

**Db2 Client 12.x Certification:** Certification with Db2 client 12.x is planned to help customers using Db2-based environments stay aligned with current database client technology and supported deployment standards.

**Oracle Analytics Server 2026 Certification:** Certification with Oracle Analytics Server 2026 is planned to support customers who rely on analytics and reporting capabilities as part of their Siebel CRM ecosystem, enabling continued compatibility with Oracle's analytics platform roadmap.

**Siebel Document Generation Platform:** A new platform for Siebel Document Generation will be OS-agnostic, run natively on Linux and Windows, supports concurrent document processing, and will be fully backward-compatible with all existing customer templates including Word mail merge fields, bookmarks, and PowerPoint. This will reduce platform proprietary dependencies, such as Microsoft Windows-specific dependencies, including use of Component Object Model (COM) for the Document Server.

**Siebel File System Modernization:** We plan to modernize the Siebel File System by introducing a cloud-agnostic Siebel File System Storage Platform that can store and manage Siebel file attachments through object storage or customer-managed storage, while preserving existing Siebel File System behavior for customers who continue to use traditional SFS. The solution provides a migration path from legacy .saf file storage to a modern storage layer with metadata, REST-based retrieval, Intelligent Search/OpenSearch integration, and AI enrichment. It is designed to support OCI, AWS, Azure, Google Cloud, S3-compatible storage, and on-premises deployments without forcing customers to change their existing SFS usage model during upgrade.

**Security and Feature Updates:** Integration of the latest certified third-party technologies delivers improved features, hardened security, and ongoing compliance.

Some of these certifications will be anchored to the 64-bit Siebel application. Through continued investment in platform certification and architectural modernization, Siebel CRM enables organizations to keep their deployments secure, current, scalable, and aligned with evolving enterprise technology strategies.

**AI Accelerated Security:** AI-accelerated vulnerability discovery and exploitation is a current security reality. As AI shortens the time between discovery and attempted exploitation, Oracle continues to strengthen the security guidance, patch readiness, and deployment recommendations available for Siebel CRM environments to reduce exposure windows and improve resilience. For more details, refer [here](#).

## Oracle Support & Services

### Oracle's Support Value

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

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

Key benefits include:

- Monthly updates packed with new features, enhancements, and cumulative bug fixes.
- Security patches, fixes, and configuration-specific update recommendations.
- Lifetime support and 24/7 access to Oracle Software experts.
- Technical resources, alerts, and proactive support tools.
- Software support across the complete stack.

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

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

### Lead with Cutting-Edge Siebel CRM Advancements

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

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

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

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

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

## Staying Informed

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

## Siebel Infoportal

The [Siebel Infoportal](#) is designed to be the go-to resource for Siebel CRM customers and partners, providing all vital information in one place. By providing a centralized location we hope it will be easier for our customers and partners to access essential information, for example:

- Events & Webcasts - A calendar of all Siebel events and webinars on a single page.
- Customer Advisory Board - Simple steps to get connected across our email lists, Cloud Customer Connect platform and LinkedIn forum.
- Implementation Partners - Find recognized Siebel experts to help with deployment and optimization.
- Customer Success Innovators - Find likeminded customers who are innovating with Siebel CRM for real-world results.
- Center of Excellence - Find out what solutions have been brought to life by the Siebel CRM Center of Excellence team. Engage with them and collaborate on your own innovative solutions.
- Siebel Roadmap & Innovations - Easily search for new innovations that have been released. Locate the latest roadmap or Statement of Direction.
- Features and Functionality - Learn about each of Siebel's key industry focus areas and core functionality.
- Cutting-Edge Technologies - Discover how Siebel CRM integrates the latest advancements, including AI, to enhance automation, analytics, and customer experience.

## Training & Certification

The latest, up to date Siebel CRM training curriculum is now available on the Oracle University. The new [Siebel CRM Cloud Learning Subscription](#) contains over 150 hours of training content, covering development, administration, UI, and business solutions. So, whether you're a developer, administrator, or business user, these courses provide the skills needed to optimize and manage Siebel CRM applications effectively. In addition to the new training, [Siebel CRM Associate Foundations](#) and [Siebel CRM Professional](#) certifications are now available allowing you to demonstrate your expertise.

## Joining the Siebel CRM Customer Advisory Board

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

Join the CAB in just three simple steps:

1. [Click here](#) to join our CAB mailing list.
2. Request access to the private [Siebel CRM Customer Connect](#) group on LinkedIn.
3. Register for [Cloud Customer Connect](#) and follow Siebel CRM as one of your topic interests.

## **Oracle Customer Services**

A variety of services and offers are available from [Oracle Customer Success Services](#) to assist Siebel CRM customers with their implementations.

## **Oracle Customer Success Services**

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

## Connect with us

Call **+1.800.ORACLE1** or visit **oracle.com**. Outside North America, find your local office at: **oracle.com/contact**.

 [blogs.oracle.com/siebelcrm](https://blogs.oracle.com/siebelcrm)

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