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Seamless Tracking of Siebel Customer Application Status via WhatsApp

Purpose statement

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Summary

As companies look to enhance customer engagement, sending timely push notifications for updates on critical customer-related events and allowing customers to check the status of their customer-related objects, such as loan applications requests, becomes essential. In Siebel CRM, this capability can be streamlined through the integration of ODA (Oracle Digital Assistant) and WhatsApp, with the ability to track their status anytime. Additionally, customers can check the status of their applications via WhatsApp, providing them with a convenient, on-demand option for real-time updates. This whitepaper will explore how Siebel CRM can leverage these integrations to provide automated updates and accessible status checks, ultimately improving communication and user experience.

Overview

In sectors utilising Siebel CRM with a large customer base, monitoring individual records or events related to customer data can be challenging. When companies need to take actions based on changes to each record, the manual effort involved can be time-consuming and inefficient. Introducing an autonomous data processing system can significantly streamline these operations and improve efficiency.

For example, when a user creates a record, and its status is subsequently updated manually through another process after verification or analysis, it is crucial to notify the user about these changes in real time. This approach involves identifying changes to the data through a method attached to the data change object. The method retrieves the user's phone number from the system and invokes a notification service to alert the user.

A practical use case can be observed in the financial sector. When a customer submits a loan application, the application undergoes a review by the sales administration team. The team evaluates the customer's eligibility, financial background, and provided documentation. Based on the review, the sales admin updates the loan application status as either approved or rejected, and this decision is recorded in the system. Once the status is updated, an automated notification is generated and sent to the customer's registered phone number via WhatsApp. This notification includes essential details about the decision, ensuring the customer is promptly informed. This automated notification system enhances the customer experience by providing real-time updates, reducing manual intervention, and ensuring efficient communication between the company and its customers.

Challenge: Providing Customers Updates in Real-Time

For businesses using Siebel CRM, providing real-time updates on customer-related events, like application request changes and allowing customers to check the status of customer related objects anytime, is essential to maintaining customer engagement. However, notifying customers effectively presents challenges. Without an integrated push notification system, agents may need to use external tools to communicate updates, which can disrupt workflows and delay response times. Integrating ODA (Oracle Digital Assistant) with Siebel CRM and WhatsApp offers a streamlined solution, allowing for automated, secure notifications directly within the CRM. Additionally, customers can check the status of their applications via WhatsApp, enhancing both customer satisfaction and operational efficiency.

How it works

Configure Meta Business Account

To integrate the Siebel-WhatsApp-ODA Bot, a Meta Business Account is required for API access, enabling WhatsApp messaging within Siebel CRM for secure customer interactions. The business phone number is configured for live messaging, allowing customers to interact with the Siebel-ODA system to check their current status and receive push notifications from Siebel.

Configure Oracle Digital Assistant

To set up Oracle Digital Assistant (ODA) with WhatsApp for Siebel CRM, begin by creating a skill in ODA that includes the necessary intents to handle user queries, such as checking the latest status of applications or customer-related objects. Next, use Flow Designer to build conversation flows for each intent, integrating Siebel APIs to fetch updates and generate responses to user queries. Additionally, create a dedicated intent to manage Events. This will enable customers to receive push notification messages whenever ODA receives an Event from Siebel, ensuring timely communication.

Configure Java Webhook Service in Siebel Tomcat Server

To enable communication between Meta's WhatsApp API and Oracle Digital Assistant (ODA), a custom webhook service is essential. Since ODA lacks built-in support for a WhatsApp channel, the webhook serves as a bridge to handle incoming messages from WhatsApp and relay responses from ODA back to the customer. This service will manage both inbound requests (like messages from customers) and outbound responses generated by ODA, ensuring smooth, real-time interaction.

Configure Business Component eScript

In this setup, an eScript is configured in the Siebel Business Component on which the Customer must receive updates on Business Component field updates via Push notifications to call a Java service deployed on the Siebel Tomcat server. The Java service triggers a notification event to Oracle Digital Assistant (ODA), which processes the request and forwards it to a webhook. The webhook then sends the notification to WhatsApp, ensuring real time communication with the customer. This integration automates the notification flow, enabling seamless, efficient updates for customers through WhatsApp.

Benefits

1. **Enhanced Customer Engagement:** By sending push notifications via WhatsApp, customers are instantly informed of any updates to their application status or related fields in real-time. This ensures customers feel valued and engaged, leading to higher satisfaction as they are consistently kept in the loop without having to manually follow up.
2. **Convenience and Accessibility:** Allowing customers to check their application status anytime, via WhatsApp, ensures convenience. Customers can track their progress without waiting for office hours or requiring customer support intervention. This 24/7 access empowers customers and increases their satisfaction with the service.
3. **Increased Operational Efficiency:** Automating the process of sending updates through push notifications reduces the need for manual communication from customer service teams. The system triggers notifications automatically based on updates to customer-related objects, which minimizes human error, saves time, and ensures that customers receive timely, accurate information.
4. **Improved Customer Retention:** Providing consistent, real-time updates and easy access to customer related objects statuses creates a sense of reliability and trust with customers. By making customers feel informed and in control of their application journey, they are more likely to return for future services, fostering stronger long-term relationships and enhancing retention.

Conclusion

In this whitepaper, we've presented a solution that integrates Siebel CRM with WhatsApp to automate the delivery of real-time push notifications and enable customers to check the status of their application-related objects, such as loan requests. By leveraging Siebel's workflow capabilities and WhatsApp Business API, this solution enhances customer engagement, improves operational efficiency, and provides a seamless user experience. We believe this approach will serve as a valuable reference for organizations seeking to enhance their customer communication and status tracking processes.

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