Oracle Fusion Cloud Sales Automation

How do I get started with Sales Orchestration?

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1 About the Sales Orchestration Playbook

How to Use This Playbook

Use this playbook to learn how to get started with the agentic Sales Orchestration feature and how agents can help close deals with opportunities by using sales motions and sales plays.

A sales motions defines a sales strategy for a particular customer segment, product set, or selling scenario. It provides a workflow for your sales organization to follow and the steps required to achieve a specific sales objective.

Sales plays are mostly tied to a marketing strategy and provide sales and marketing collateral through content bundles. Content bundles operate at a higher level than sales plays and contain content about products or industries that exist regardless of go-to-market (GTM) strategy. Sales plays are very specific go-to-market strategies for a selling scenario and help salespeople quickly find relevant collateral to ensure consistent messaging and package content for specific selling situations. For example, you can use the collateral in presentations and communications with customers. The agent uses this collateral to generate talking points, draft emails, and recommendations during the sales cycle.

Prerequisite Setup for Sales Orchestration

This playbook assumes that you've set up the main features of Oracle Sales for Redwood.

How the Sales Orchestration Playbook Is Organized

The playbook contains the following sections:

- **About Sales Orchestration**:

  This section gives you an overview of Sales Orchestration key concepts.
- **Setup Sales Orchestration**:

  This section explains how to:
  - Define your sales strategy by creating sales motions.
  - Provide the sales collateral required to sell products to different markets by creating sales plays aligned to your sales strategy.
- **Use Sales Orchestration**:

  This section details how to access Sales Orchestration to engage with the customer and close the deal. It outlines how to use the recommendations to complete the appropriate actions with the help of AI agents and provides some answers to frequently asked questions.

2 About Sales Orchestration

Overview of Sales Orchestration

With Sales Orchestration, salespeople focus on customer engagement and selling. AI agents do the rest.

As salespeople engage with customers, Sales Orchestration AI agents:

- Summarize customer interactions, so salespeople don't need to read through email threads and notes.
- Recommend the next best actions to move the sale forward, with the goal of completing the sales strategy objectives you set up.
- Capture opportunity information automatically from interactions, eliminating data entry.

  For example, the agent automatically updates fields and attributes and supports the automatic capture and summarization of transcripts from zoom meetings.
- Draft emails and talking points.
- Answer questions about the products you sell and provide the collateral salespeople need to sell them.

  For example, the agent can provide answers to sellers questions related to the deal, including product questions about the customer reference, unique selling propositions (USPs), customer objections and so on.
- Recommend new contacts to add to the opportunity.

Trust and Security

Salespeople can always review email drafts and suggested opportunity updates. No email is sent and no product is added to the opportunity without a human in the loop. Sales Orchestration is built into the sales application, so it respects your existing setup and security.

Salespeople aren't led astray by misleading information on the web. Only the initial sales motion setup can source information from the internet. Recommendations and drafts used during the sale are sourced only from your sales application and from the documents you upload.

The Salesperson Experience

Salespeople create an opportunity from the Opportunity list page, enter the initial information, and save. That's the extent of manual data entry as AI agents take it from there.

Opportunities can also be generated automatically if you're using Oracle Unity or Oracle Eloqua. See the *Oracle Unity Help Center* for more information.

Salespeople can select and the apply the most appropriate sales motion and sales play as soon as the required opportunity information is available.

When salespeople drill down to open the opportunity, the sales play name appears in the opportunity summary. From that point on, salespeople focus on interacting with customers. They're supported by the following capabilities:

- Summaries of interactions with the customer

  This includes summarization of Account, Opportunity and Contact level summaries
- Recommended actions
- An AI subject matter expert

  Provides account Insights to reduce the sellers time do research the customer.
- Opportunity updates without data entry

  This includes engagement generation of emails, talking points, meeting agendas and so on
- A list of meetings scheduled for the opportunity in the next 7 Days
- Overview of progress toward meeting sales objectives

  The agent progresses opportunity in a nonlinear fashion with adequate justifications beyond just an overview.

Summaries of Interactions with the Customer

An ongoing Engagement Summary highlights key information from both first-party and third-party customer interactions, including emails, call logs, and notes. You can drill down to see summaries of individual email threads and call notes, and then drill down again to view the source information.

Email threads started from the opportunity are summarized automatically. The AI also compiles a list of other emails it deems relevant to the opportunity. Salespeople confirm which emails to add to the opportunity by selecting **We've found new emails for you.**

Recommended Actions

AI monitors opportunity updates and recommends actions to help bring the deal to a close. To generate recommendations, the AI agent considers:

- All engagement on the opportunity so far, including opportunity updates and the text of emails, call logs, and notes
- The collateral uploaded to the sales play during setup
- The high-level activities required to complete the sales motion associated with the sales play

Recommendations prioritize customer requests in incoming emails and scheduled activities over activities intended to advance sales motion objectives. For example, if a customer requests a meeting or collateral in an email, that request becomes a high-priority recommendation.

Salespeople can take action directly from a recommendation. For example, if the recommendation is to schedule a demo, you can:

- Send an email invitation prepopulated with an agenda, proposed times, and a link to relevant collateral from the sales play.
- Schedule the demo on your calendar and send the invitation.

- Call the contact and log the call.
- Prepare for the demo by generating and refining talking points in the Deal Advisor.

Deal Advisor: An AI Subject Matter Expert

As they work, salespeople can ask questions in the Deal Advisor chat. Deal Advisor is based on the documents uploaded to the sales play and the best-practice sales strategy defined in the sales motion. It can also access sales information captured in the Sales application.

Deal Advisor can answer questions and help salespeople refine generated emails and talking points.

> **Note:** Deal Advisor is grounded to the:
> - Information uploaded to Sales Orchestration during setup
> - Information captured in the opportunity itself
> - Sales data in the Sales application that the salesperson has permission to access.

Opportunity Updates Without Data Entry

The Deal Data Capture agent monitors customer interactions and extracts information that can be entered into the opportunity to move the deal forward. For example, if a customer indicates in an email that they've a budget, the application suggests an update to the Budget field.

Salespeople are notified to review and confirm captured information under the **What we’ve done for you** heading.

> **Note:** The Deal Data Capture agent can't extract data related to Dynamic Choice Lists (DCLs), dependent lists and child objects.

Overview of Progress Toward Meeting Sales Objectives

An AI agent monitors completed actions and records progress on sales objectives and high value activities (HVAs) based on the sales motions. Salespeople can view progress by selecting **View Sales Objectives**.

Monitoring objectives is optional. Salespeople who follow the recommendations can complete the sales strategy objectives without explicitly tracking them.

3 Set Up Sales Orchestration

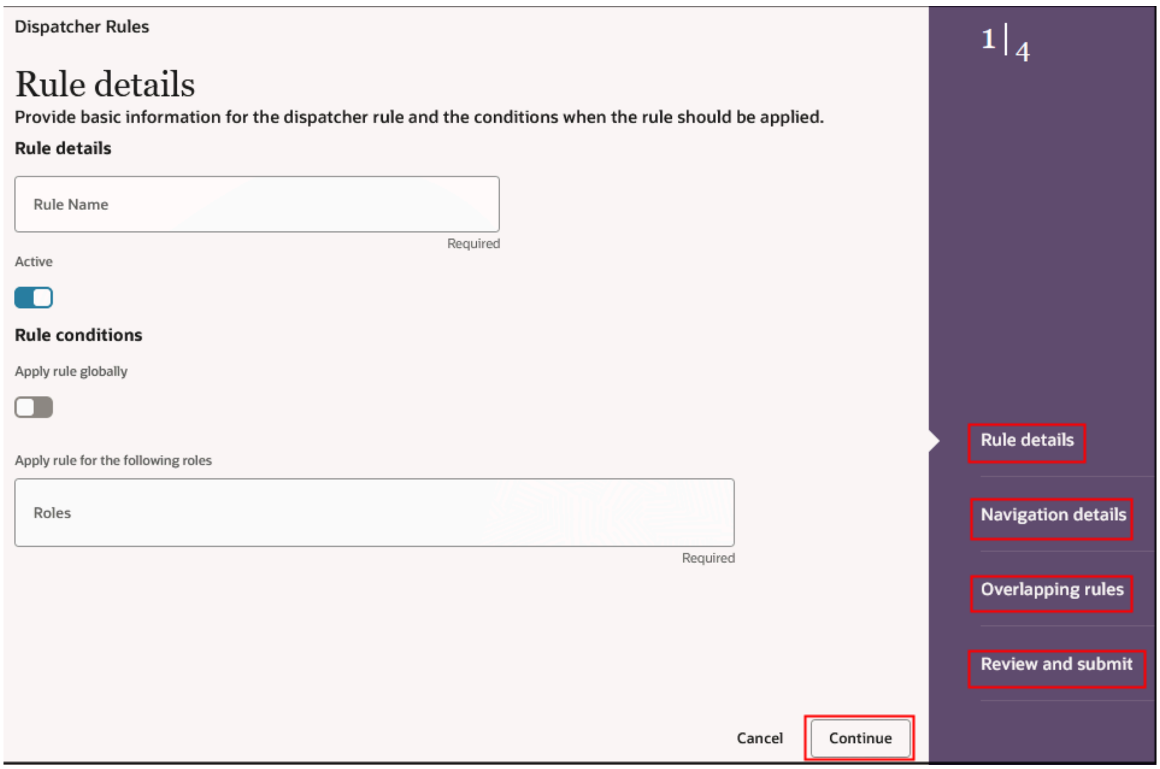
Before You Start

Before you can access and start to use Sales Orchestration, you must:

- Set up Dispatcher rules for salespeople to access the Sales Orchestration page.

  For example, to create a dispatcher rule:

  a. Go to **Navigator** > **Configuration** > **Sales Administration** and select the **Dispatcher** tile.
  b. From the Dispatcher UI, select **Create** to display the following Dispatcher Rules guided process:



  c. For the **Rule details** step, follow the steps in the guided process and provide the required basic information for the dispatcher rule and the conditions when the rule should be applied.
  d. Continue to the **Navigation details** step and select the objects and pages that support this rule's navigation, including the navigation component's new destination.
  e. Continue to the **Overlapping rules** step and if dispatcher rules overlap with each other, specify which rule to use first from here.
  f. Select **Review and Submit**.

> **Note:** You can navigate from the Sales Orchestration application to the VB app in several ways. Use a custom navigation action available in the **Actions** drop-down list, add a link to the Opportunity header using extensibility, or create a smart action on the list or foldout panel to navigate directly to the Sales Orchestration app.

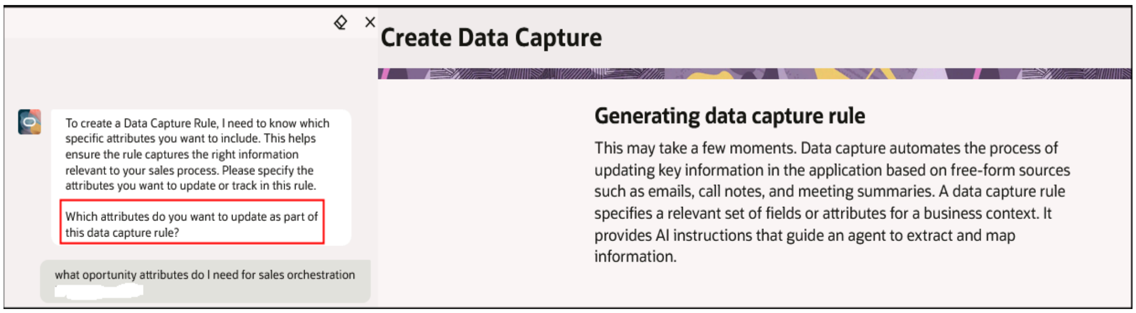
For more details, see *Change Navigation to Pages in Your Sales Application* topic in the *How do I create an application extension for custom objects?* playbook.

You can also view a demo of how to do this from this *Using Dispatcher to Override Default Navigation* video.

- Enable data capture for opportunity attributes using Deal Data Capture setup for the Deal Advisor to suggest opportunity updates.

  For example, to enable opportunity attributes using Deal Data Capture setup:

  a. Go to **Navigator** > **Configuration** > **Sales Administration** and select the **Data Capture Rules** tile.
  b. From the Data Capture Setup UI, select **Create Data Capture** from where you can provide a brief context of what data to capture or what attributes to start with and explore.
  c. Select **Create** and a screen similar to the following screen is displayed.

  Data capture automates the process of updating key information in the application based on free-form sources such as emails, call notes, and meeting summaries. A data capture rule specifies a relevant set of fields or attributes for a business context. It provides AI instructions that guide an agent to extract and map information.

  d. In response to the prompt, specify which attributes do you want to update as part of this data capture rule?

  For example, to effectively capture a deal for sales orchestration, key Opportunity attributes typically include:

  - Close Date
  - Win Probability
  - Expected Revenue
  - Opportunity Type
  - Status
  - Comments

  These fields help track the deal's timeline, likelihood of success, financial impact, and contextual notes. Also, attributes like Budget Amount, Forecast Category, and Decision Level can provide deeper insights into the deal's background and forecast accuracy.

Note: Only opportunity attributes can be enabled in release 26B. Also, note that the agent can't extract data related to Dynamic Choice Lists (DCLs), dependent lists, and child objects.

What the Sales Organization Sets Up

Unlike earlier versions of Sales Orchestration (now renamed Guidance), you don't manually set up a detailed step-by-step process for salespeople to follow.

Instead, you:

- Define your sales strategy by creating sales motions.
- Provide the sales collateral required to sell different products to different markets by creating sales plays aligned to that strategy.

Sales Motions

A sales motion defines a sales strategy for a particular customer segment, product set, or selling scenario. It provides a workflow for the sales organization to follow and the steps required to achieve a specific sales objective.

Sales motions capture sales strategies for different product classes and market segments and help salespeople align to those strategies. They provide a framework that improves your chances of closing the deal.

Most sales organizations need only about half a dozen sales motions. For example, if your organization sells both equipment and software, or sells to both the private and public sectors, you likely need different strategies and processes for each.

When you create a sales motion with the help of AI agents, you:

- Capture and refine your organization's best practices.
- Generate objectives and high-value activities that salespeople can follow to meet those objectives.
- Define the criteria the agent uses to evaluate each opportunity and determine whether sales motion objectives are met.

As the sale progresses, salespeople and sales management can see whether objectives and their suggested activities are in progress, completed, or still pending.

Sales Plays

A sales play within a sales motion helps make day-to-day sales activities repeatable, measurable, and automatable. Sales plays contain collateral for selling specific products or product groups. Salespeople use the collateral in presentations and communications with customers.

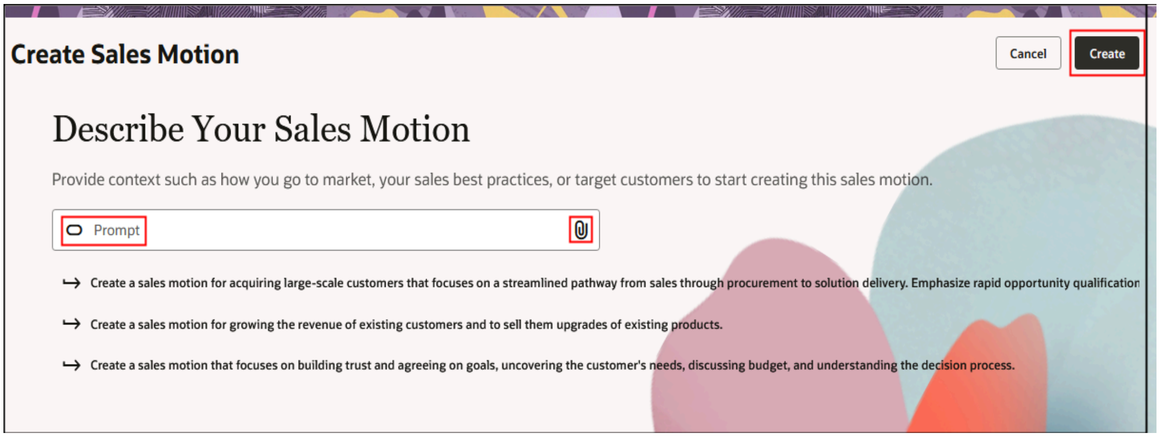
The agent uses this collateral to generate talking points, draft emails, and recommendations during the sales cycle. If the sales process differs by industry or market segment, create separate sales plays for each.

Create a Sales Motion

Create a sales motion to define a sales strategy for a particular customer segment, product set, or selling scenario.

To create a sales motion:

1. Go to **Navigator** > **Configuration** > **Sales Administration** and select the **Sales Motions** tile.
2. From the Sales Motions, select **Create** to display the following Create Sales Motion screen:



3. Select one of the predefined prompts or enter your own. For example, provide context such as how to go to market or target your customers using your sales best practice.
4. Optionally, upload sales documents the AI agent can use as background to tailor the sales motion and related sales plays to your business.
5. Enter a short description of what you're creating the sales motion for.

   If you include a product category in the prompt, the agent can suggest objectives and activities relevant to that category. For example, if you're selling medical machinery that requires regulatory approval, the agent might suggest obtaining that approval as an objective.
6. If key information is missing, the agent asks follow-up questions.

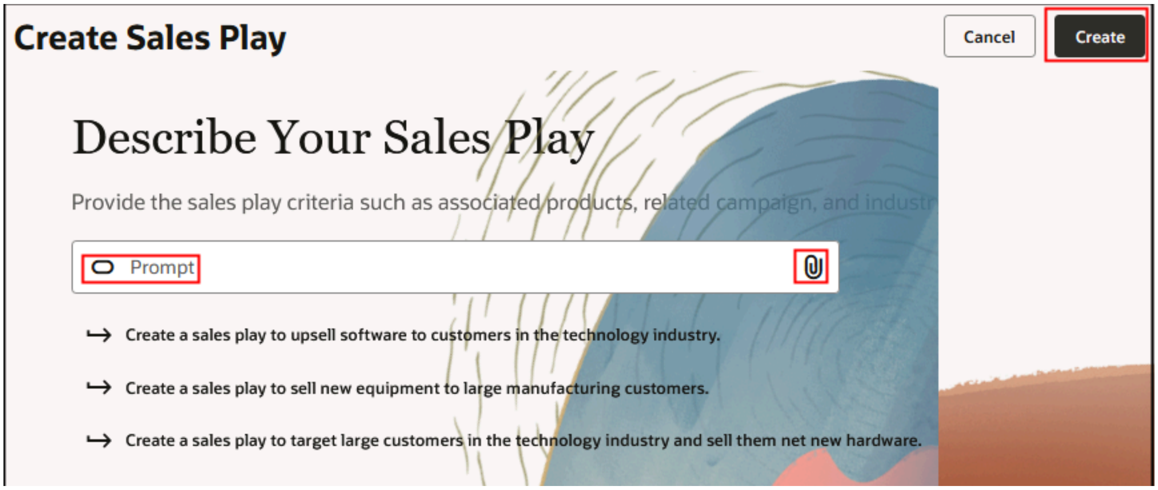
   For example, if your organization uses different sales processes by region or market, the agent asks you to specify the region or market if it isn't included in your prompt.
7. The agent generates an initial draft using the documents you provided, information available in your Oracle Sales application, and general web-based knowledge.
8. The agent generates objectives and the high-level activities needed to meet them. It also generates the criteria it will use to assess completion for each objective as salespeople work the opportunity.
9. Review the draft. If you aren't satisfied, you can upload more documents, suggest additional high-value activities, or edit manually. Creating the sales motion is iterative.
10. The sales motion is regenerated each time you add documents, modify the prompt, or suggest changes. Previous drafts remain available during your session.
11. If you manually edit an objective and want to preserve it, lock it to prevent regeneration. Or, you can also ground the agent to change only the selected objective.
12. When you're satisfied, save the motion and activate it.

Create a Sales Play

Create a sales play to provide the sales collateral required to sell products to the market segments defined in sales motions.

1. Go to **Navigator** > **Configuration** > **Sales Administration** and select the **Sales Plays** tile.

2. From the Sales Play, select **Create** to display the following **Create Sales Play** screen:



3. Upload documents related to the products that are part of the sales play. These can include slide decks, spreadsheets, and PDFs.

   The AI agents use these documents as source material for recommendations and for drafting emails and talking points.

   If you want salespeople to view and use the source documents themselves, you must also store them in a separate repository. The documents you upload must include a URL to that repository. The link allows salespeople to view and download the documents for use in presentations and customer communications.
4. Enter a prompt that describes the sales play. Include the industry or market segment and any other details that determine where the sales play should be applied.
5. The agent generates a draft sales play that includes:

   - The filters used to apply the sales play to the appropriate opportunities.

     For example, the sales play could apply only to customers in the high-technology or medical industries.
   - The products, product groups, or SKUs the sales play applies to.
   - A suggested list of supporting materials for you to upload.
6. Upload the documents the agent requests. You don't have to upload them all if you don't think they're required.

   The agent checks off the suggested documents as you upload them.
7. Edit the draft as needed. Pay close attention to the filters and the products used to decide where to apply the sales play.

   The AI makes educated guesses if your initial wording doesn't match the classifications and product names in your Sales application.
8. Associate the sales play with one or more sales motions. You can create different sales plays for the same products.
9. If needed, rephrase your prompt and generate a new version. Each version remains available in the chat window.
10. When you're satisfied, save the sales play and activate it.

4 Use Sales Orchestration

Navigating in the Sales Orchestration Page

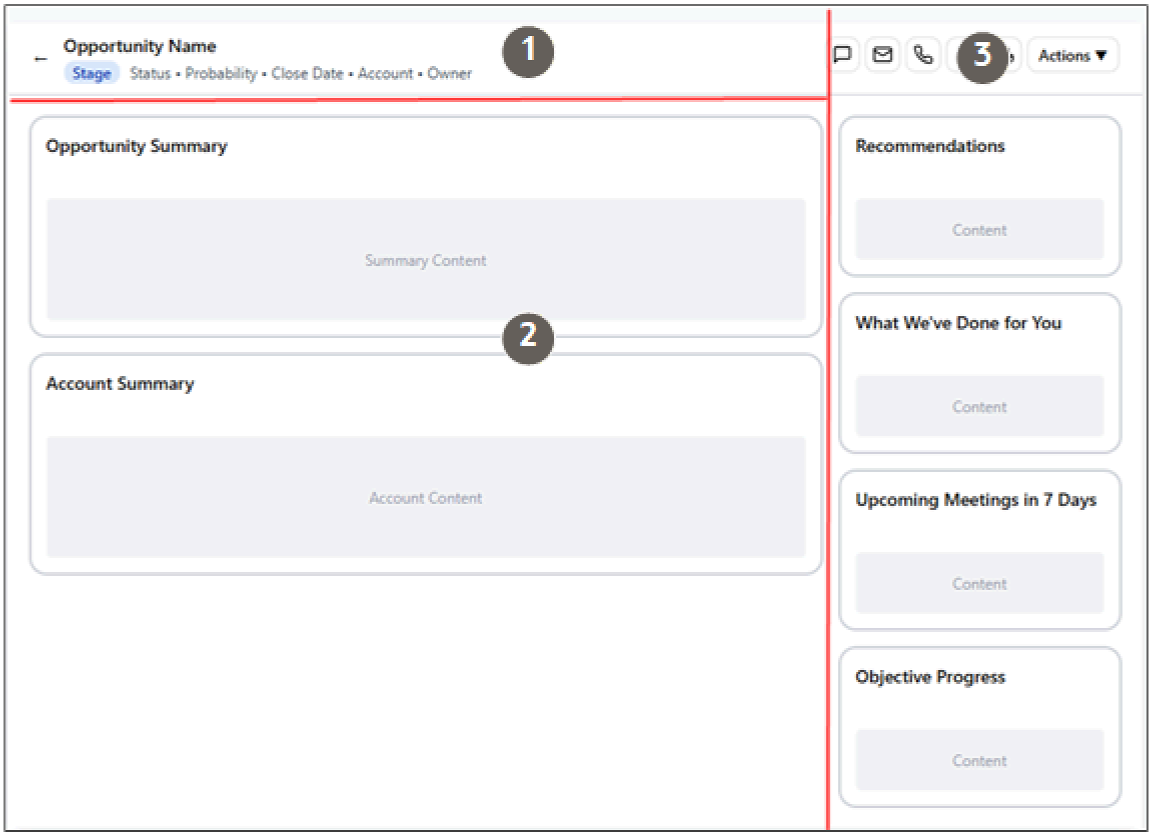
When you first open the opportunity, the page displays both summaries of your interactions with the customer and the account summary.

Initial Summary View

Here's a sample of the anatomy of the opportunity page view in Sales Orchestration with callouts identifying major sections:

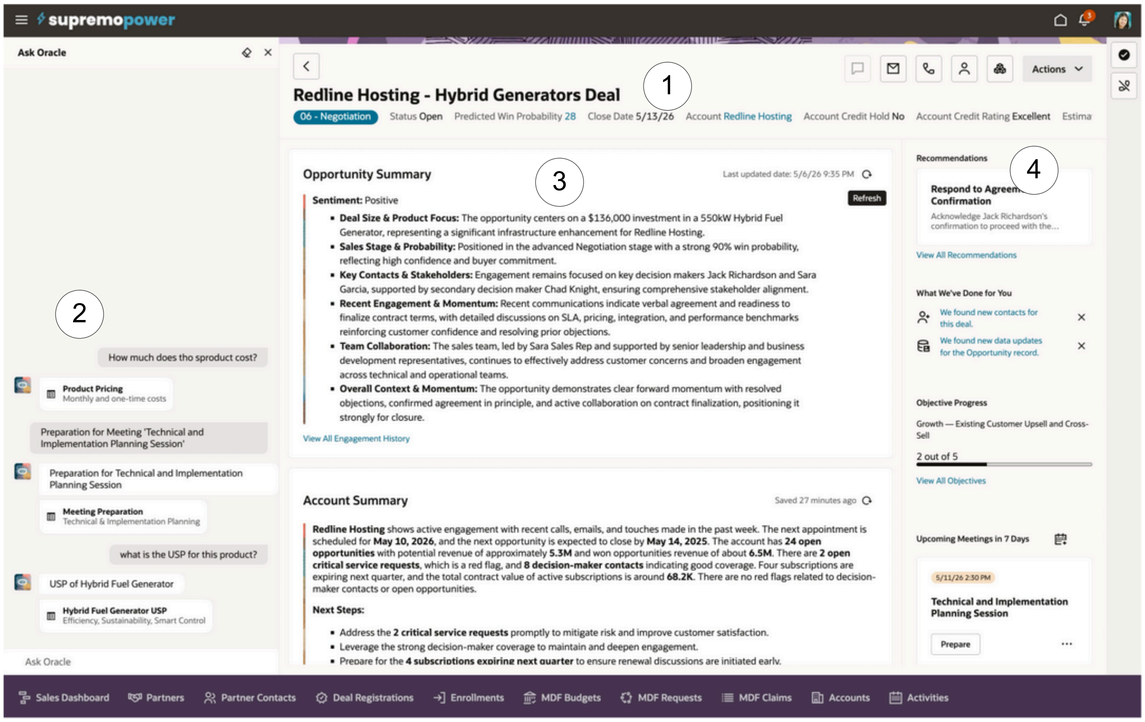
Anatomy of the Initial View

Callout	Description
1	Header with key opportunity information
2	Summary of your engagement with the customer on the opportunity and a summary of the account information. You can drill into the engagement summary to view the details and reply to emails.
3	Actions you can take and an overview of the progress toward meeting your sales objectives.



Working with Ask Oracle

Open the Ask Oracle chat by selecting either the Chat icon or one of the recommendations.

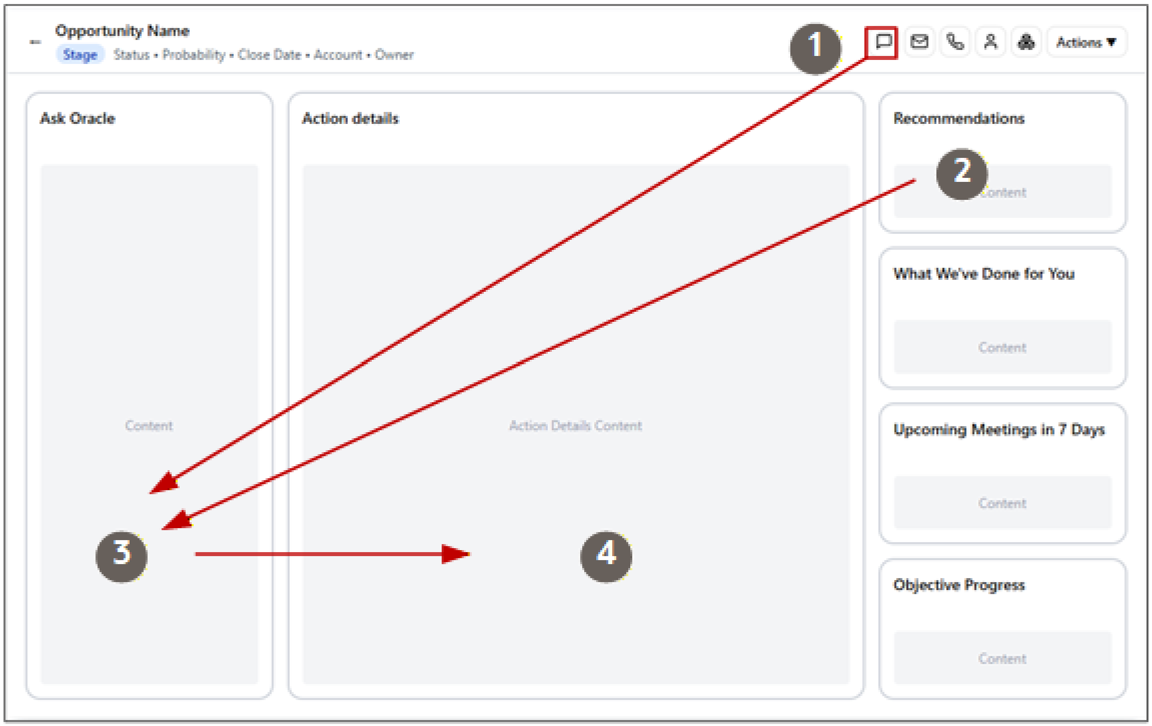


When you work, the page is divided into 4 main sections.

Ask Oracle View

Callout Number	Section	Description
1	Header	Header with key opportunity information
2	Ask Oracle chat	Ask questions and request updates in the Ask Oracle section.
3	Action details work area	The Action Details is the work area where the AI agent displays drafts.
4	Actions	Take actions using the toolbar or select a recommendation. You can also view and approve AI suggestions under the **What We've Done for You** heading, review upcoming meetings, and view progress on achieving your team's sales objectives.

Both the **Chat** icon (1 in the following sample image) and the recommendation (2) open the Ask Oracle chat (3) as depicted:



Selecting a recommendation automatically starts the chat and display drafts in the middle Action Details work area (4). You can request changes to the draft using the chat. Each time you request a change, Ask Oracle generates a new draft. You can go back to previous drafts by selecting their icons in the chat. If you close the Action Details work area you return to the summary view.

Create an Opportunity

Create the opportunity as you normally would in the Sales application.

1. Use the Create Opportunity action from the Opportunity list page, from the Sales Dashboard, or from other pages where this action is enabled.
2. Add products, product groups, and any other information to help the application determine which sales motion and sales play apply.
3. Select **Save**.

Work Your Opportunity and Close the Deal

Use Sales Orchestration to engage with the customer and close the deal.

1. Open the opportunity from the list page or from the Sales Dashboard.

2. If this is a new opportunity, you can start by contacting the customer using the actions available in the **Engage** menu at the top of the page.

   It's important to start email conversations by selecting **Engage** > **Compose Email** rather than from Outlook. Starting email threads from the opportunity ensures the conversation is summarized and key information is captured.
3. If you're calling the customer, make sure you log an interaction (**Engage** > **Log an Interaction**). You can upload meeting summaries and AI agents convert uploads to text and extract opportunity updates and recommended actions.
4. Optionally, you can confirm that the correct sales play is displayed at the top of the page.

   The sales play provides context for the recommendations you receive and provides targeted collateral to use when communicating with customers. Different products and product groups might require different sales plays so you can override the automated sales play selection if you want
5. You can select a different sales play and even a different sales motion using the **Actions** menu. If you're unsure which sales play is appropriate, click the link to return to the opportunity detail view and add more information about the account and the products you're selling.
6. Review customer communications in the Engagement Summary.

   The summary provides key points from your opportunity team's communications with the customer. Select the **View Engagement History** link to view summaries of individual email threads, calls and meetings. You can expand threads to view the emails, calls and meetings.
7. Review the recommendations and act on them.

   Recommendations are sorted and presented in order of importance. Direct requests from contacts on the opportunity are prioritized.

   Select **Take Action** from the recommendations to complete the appropriate actions with the assistance of AI agents. Following the recommendations helps ensure you meet your organization's sales strategy goals.

   If the recommendation is to schedule a demo, for example, select **Compose Email** to view a draft email invitation created by the AI agent. The draft outlines the proposed demo content based on the products you're selling, lists suggested participants, and asks the customer to confirm availability. If you've already agreed on a time, you can copy the meeting to Outlook.

   Need to attach a presentation to the email? Search for it and add it. When you're done, approve and send.

   To prepare for the demo before scheduling, select **Prepare** to have Deal Advisor generate talking points and answer your questions.

8. Review and approve suggested opportunity updates under the **What we’ve done for you** heading.

   For example, AI agents can suggest:

   - Updates to opportunity fields.

     As you engage with your customer, AI agents suggest opportunity updates. For example, if a customer agrees to purchase a particular product in an email thread, the AI agent presents a new opportunity line item already filled out for you.

     You must approve all opportunity updates. Progress toward completing objectives and goals isn’t affected while items are awaiting your approval.
   - New contacts identified from your customer engagements.
   - Additional emails to add to the opportunity.

     While all emails sent from the opportunity are logged automatically, email threads initiated from Outlook aren’t. Adding relevant emails provides AI agents with valuable information to help you with the sale.
9. Get an overview of how you’re meeting your organization’s sales strategy goals by reviewing High Value Activity (HVA) progress. Monitoring your progress isn’t required. As long as you follow the recommendations, you’ll complete the activities.
10. Use the Upcoming Meetings list to stay informed about your appointments for the week.

5 FAQs for Sales Orchestration

How do I update the information in the opportunity fields?

After you create the initial opportunity record, you typically shouldn't need to update fields manually. As you interact with the customer, AI agents analyze your communications and suggest opportunity updates. You're periodically notified to review and approve the updates by selecting **Deal Data Capture** in the toolbar.

To update an individual opportunity attribute manually, select the opportunity number link to return to the opportunity detail view. In the detail view, you can update fields using the Ask Oracle bar.

In Deal Advisor, can I update opportunity information as I do in Ask Oracle?

No. You can't directly update opportunity information in Deal Advisor. AI agents automatically update opportunity information based on the record of your customer engagement. Periodically, you're asked to review and confirm updates using Deal Data Capture. Deal Advisor can answer questions about the products you're selling and provide the collateral you need during customer engagement.

What information does the Deal Advisor use to help me with the deal?

The Deal Advisor chatbot uses the collateral your organization included in the sales play and all information captured in the opportunity itself. This includes emails, call logs, and notes. Because the sales play is associated with a specific sales motion, Deal Advisor suggestions align with your organization's sales strategy.

How can I attach a presentation to the email I'm sending to the customer?

In the Ask Oracle chat, you can ask for the link to the presentation and download it to your desktop.

Why is there no Ask Oracle bar on my screen?

You don’t need to manually enter information into your opportunity. As you communicate with your customer, AI agents monitor email exchanges, call logs, and notes to collect the required information and suggest opportunity updates. Periodically, you’re notified to verify the updates by selecting the **Deal Data Capture** action from the toolbar.

Our organization relies on Sales Methods to drive forecasting, so how do we make sure that the Sales Motions work with the Sales Method setup?

When you create the Sales Motion, you can provide a document to outline that the sales method setups must be considered when creating the sales motion objectives. You can use a Groovy script to update the sales method so that sales motion objectives are met.

For example, to autoupdate the Current Stage of an opportunity based on completed objectives and HVAs in the Sales Motion, you must use a Groovy script of some extensible option because the Sales Motion doesn't automatically autoupdate the Current Stage of the opportunity.

Are the notes I take with the Notes feature part of the Engagement Summary?

No. Notes taken with the Notes feature can be private, so aren’t included in the Engagement Summary.