



FB180
PHASE: CUSTOMER
SUCCESS

OWNER: CUSTOMER SUCCESS TEAM

170

180



CUSTOMER
SUCCESS

FB180: PHASE 100 CLOSE

Owner: Customer Success Team

1 VERSION CONTROL

1.1 DOCUMENT HISTORY

Version	Amendment Description	Date	Author
1.0	Initial overview version	19/06/2019	Craig Neal

2 INDEX

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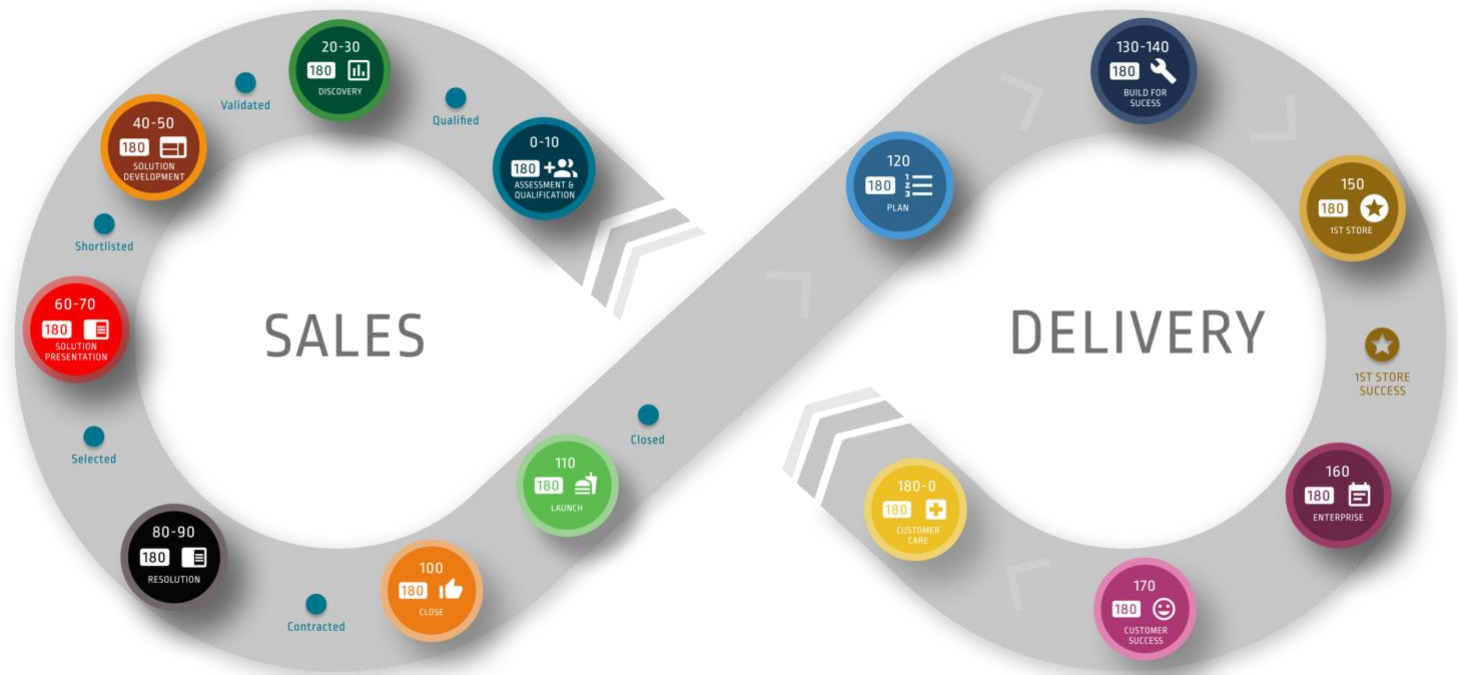
2.1 INTRODUCTION

Welcome to the Customer Success stage, which is Phase 170 of the Food & Beverage 180 portal. This phase concentrates on all the processes, steps and provides information to the relevant collateral required for a a hugely successful transition into a Customer Success engagement.

2.2 GLOSSARY OF TERMS

Acronym	Type	Definition
OMA	Document	Oracle Master Agreement
C2A	Process	Click to Accept
CEMLI	Document	Configuration, Extension, Modification, Localization, and Integration
DAS	Application	Deal Approval System
OD	Document	Order Document
POEF	Document	Purchase Order Exemption Form
PO	Document	Purchase Order
OIP	Application	Order Information Portal (Lite)
SLA	Document	Service Level Agreement
CRA	Application	Customer Request Application
SPS	Application	Cloud Provisioning Portal (Why SPS I don't know)
Q	Application	Application that manage, track your quote, contract and approvals
CPQ	Application	Think this is a spelling mistake and should be CRA
ABE	Process	Accelerated Buying Experience
SAR	Document	Service Activation Request

2.3 FB180 INFINITY LOOP



3 PHASE 170 – CUSTOMER SUCCESS

3.1 APPLICABLE TIERS



- Super Tier 1 – Dedicated CSM with additional CSMs providing regional specific coverage
- Tier 1 – Dedicated CSM
- Tier 2 – CSM assignment agreed based on need. Structured CSM Review Once Per Month
- Tier 3/4/5 - CSM assignment agreed based on need. Structured CSM Review Once Per Quarter

3.3 ORACLE OBJECTIVES

Oracle Standard CSM Model (dependent on OCI)

- Advocate, engage with the right Oracle experts
- CLM Dashboard review, health of accounts, usage, including support tickets
- New customer hand off calls
- Internal account team & executive updates KPI reporting
- Review new feature releases
- Strategy session, business challenges solved via best practices
- Executive Business Review
- Adoption review
- Usage maturity
- Collaborative ROI measurement
- Customer Satisfaction Surveys

3.3 FBGBU OBJECTIVES

The FB Customer Success team enable customers to achieve their desired business outcomes using Oracle's Food & Beverage products and Services. To predict and prevent customer churn by cultivating Healthy Satisfied Customers and enabling growth by:

- Engaging with the correct Oracle experts to ensure the customers perceives value in all connections
- Providing a holistic view of the current and future state regardless of the origin of the issue
- Helping our customers become more product proficient and product aware by sharing tools, processes and industry best practices
- Identifying customer training needs and connect the customer with available tools and communities
- Analysing our customers product consumption and adoption to help identify areas to optimize and improve
- Ensuring our customers are taking advantage of the latest cloud service capabilities and assist when planning for the future

3.4 FBGBU PROCESS FLOW

- CSM Team engage at the point of Solution Engineering for Super Tier 1 customers
- CSM Team engage at the point of Production pilot for Tier 1-5 customers
- Introduce the CSM via the Customer Welcome Letter
- Introduce CSM to Customers Stakeholders
- Define customer success criteria
- Drive functional teams to delivery against the customer success criteria

- Report performance against Success Criteria with Recommendations to mitigate risk

3.5 PHASE SLAs & KPIs

- Estimated and average 1-2 working days, dependant on deal complexit

3.6 OUTPUT CHECKLIST

Below list's the key outputs as a checklist that would be required to be completed within this phase:

- Define CSM engagement model
- Define customer assignment model
- Document on-boarding process and related documents
- Define method for measuring CSM success

3.7 USEFUL LINKS

- TBC

3.8 TRAINING

- TBC