

IBM Sterling Order Management and Call Center for Commerce V9.3 Overview

Janet K. Wall
Sr. Product Manager, Industry Solutions

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Future Development Candidates

GA Feb 28, 2014

Enable **Omni-Channel** Selling **Anytime & Anywhere** Deliver an end-to-end, omni-channel Call Center that leverages web technology to reduce complexity of deployment complexity and mgt.

Expand the capability with the POS seamless omnichannel store experience.

Deliver **Omni-Channel Promising and Order Fulfillment** Enhancements to market leading fulfillment capabilities, enabling clients to optimize promising, inventory and fulfillment decisions

Provide Technical and Performance Leadership

Direct integration approach between WebSphere Commerce and Order Management using shared integration components for faster deployment



Continue Technical and Performance Leadership

Next Integration Scenarios: WebSphere Commerce + Sterling Order Management GA Feb 28, 2014 Direct integration between **Sterling Call Center** WebSphere Commerce and **Shopping Assistance** Order Management based **Capture Orders** on Services Definition **Cancel/Change Orders** Framework (SDF) **Appeasements Returns Appointments WebSphere Commerce Sterling Order Management WebSphere Enterprise Service Bus** Inventory Orders Pricing **Promotions Direct Integration based** On SDF Get item/order price Get inventory availability Transfer order Get order status Inventory sync

Deliver Omni-Channel Promising and Order Fulfillment

Velocity Based RTAM

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Feature:

- Dynamically determine the velocity of the items at a node
- Based on this velocity, RTAM can prioritize those items that about to run out of stock

Benefits:

- Web store will be less likely to oversell
- Improved performance
- Reduced resource consumption

Demand Velocity RTAM Triggers Availability

Deliver Omni-Channel Promising and Order Fulfillment

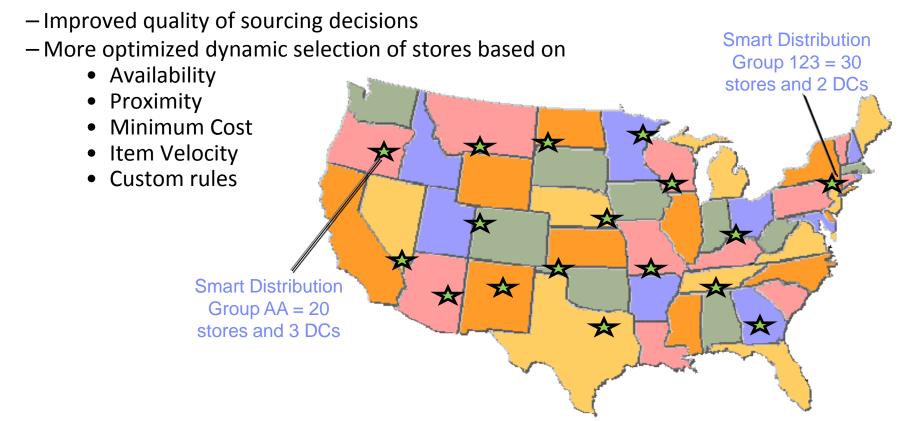
Smart Distribution Groups

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Feature:

 Simplified management of product fulfillment locations through definition of smart distribution groups

Benefit:





Promise and Fulfillment of Value Added Services - Personalization, Value Added Services

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Feature:

- Products will have associated special services with corresponding processing times
- Products and special services will be captured on order entry
- Schedule will source only from the locations that can provide special services selected on the order
- Availability date computation will consider special services processing time
- Shipping location will be notified which special services should be performed for a given order

Benefits:

- Personalization choices for consumer translates to added differentiation and loyalty for the brand
- Accurate promising and availability updates important for customer service, reliability
- Optimization of fulfillment choices results in streamlined operations and assured customer satisfaction



Teliver Omni-Channel Promising and Order Fulfillment

Cost Based Scheduling API

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Feature:

- Provide User Exit which allow customization of cost calculations at various execution points
- Determine best carrier service to be used while inquiring for availability

Benefit:

- Apply customized operating costs that your business wants to be part of the scheduling decision
- This allows your fulfillment strategy to be influenced by your costing tools and systems that business users manage

SPEND

eliver Omni-Channel Promising and Order Fulfillment

Flexible Order Management Deployment Models (For Advanced and Enterprise Add On Customers)

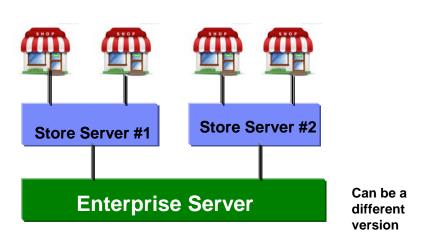
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Feature:

- Extend to multiple instances, each serving a local population of users.
- Instances can be a mix of corporate enterprise servers, regional servers and remote servers that reside on the edges of the network, such as retail stores, warehouses and depot locations and off shore call centers.

Benefits:

- Enable a scalable implementation model
- Beneficial to POS implementations which may involve the use of additional servers deployed locally in the physical store.



Teliver Omni-Channel Promising and Order Fulfillment

Upgrade to Promising Hub (For Advanced and Enterprise Add On Customers)

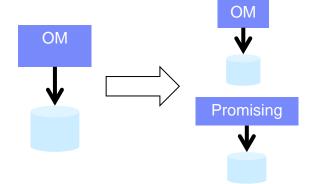
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Feature

- Enable customers to separate Promising Hub from OM instance
- Copy supply/demand data through DB replication
 - Should use existing DB solutions
- Copy extensions
- Allow reservation APIs to directly update demands

Benefits

- Migration to highly scalable model
- No or minimal downtime during migration
- Promising Hub provides a single availability picture across all channels and systems



Deliver Omni-Channel Promising and Order Fulfillment

Buy Online Pickup in Store (BOPUS)

Coming in FP after GA

Feature

Customer

- Places BOPUS order. Paid for in full.
- BOPUS order assigned to Store

Store Associate

- Using a handheld mobile device scanning -picks product from backroom or sales floor
- Call out to Merchandising / Stock systems for shelf inventory - suggestions and updates
- Scans drop off 'Holding' location
- Status update Notification to customer

Help Desk Associate

- Using a tablet or register, pulls up customer order
- Verifies id
- Hands over product to customer
- Updates order status
- Browser based screens embeddable via iframe in POS





Customers expect you to maintain and leverage a 360-degree view of virtually *all* purchases across all channels (Store, Web,



Maintain cross-channel customer history (important to very important)	53%
Notify when frequently-purchased item will be on sale (important to very important)	59%
Assist with matching the compatibility of a new purchase with a previous purchase (important to very important)	49%



Disjointed order fulfillment processes can hurt the overall customer experience

Lack of
Order and
Inventory
Visibility

- Available-to-promise dates are unavailable or inaccurate
- High cart abandonment rates leads to lost opportunity
- Unable to deliver relevant up-sell and cross-sell offers or promotions to customers

Navigating Multiple Systems

- Creates expensive fulfillment errors
- Unable to provide complete order history and visibility in a timely manner
- Time-consuming processes to change or reschedule orders



Dissatisfied Customers

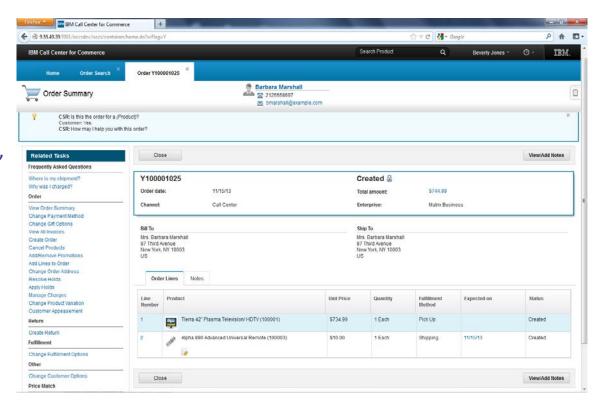




IBM Call Center for Commerce is the next generation of IBM's call center

A single commerce touch-point for customer service teams

- Out of the box integration to web, store, and point of sale
- •Single view of orders in progress, carts, and past orders
- Single view of all supply and demand to save the sale and increase revenues
- More relevant cross-sell/up-sell offerings for customers
- Special order modifications such as price matches and discounts

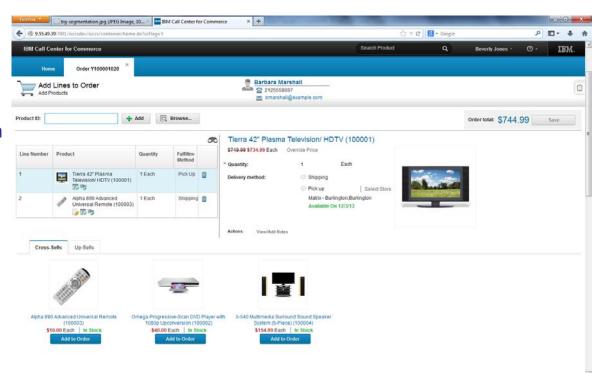






Informed collaboration with customer from a single access point

- Augment CRM information with Commerce information for a more informed omni-channel interaction with customers
- •Hyperlinks to any commerce site from work space to view the same information that the customer views
- •User-defined scripts to help the call center agent walk through standard scenarios
- •Track customer inquiries and history with easy reference to notes in the call



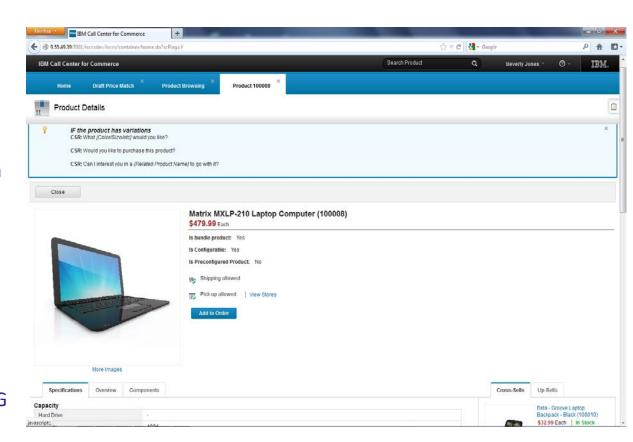




Web-based solution improves call center efficiency and lowers IT costs

Improved productivity and efficiency of call center agents

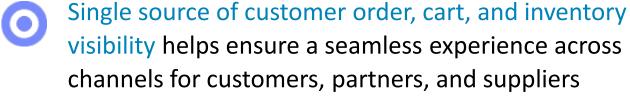
- •Context based links to information and screens to address customer's inquiries and requests quickly
- More collaborative assistance of customers with hyperlinks to company sites
- •Easier to deploy and more manageable to change
- •An easy to use, intuitive, WYSIWYG workbench for faster extensions and integrations to expand the footprint of the call center and customer care solution





IBM Call Center for Commerce provides a single commerce touch-point for customer service teams

Omni-channel foundation provides visibility and automated processes that help enable the utilization of multiple fulfillment strategies such as buy on-line and pick-up in store



Web based technology improves productivity and efficiency with intuitive, easy to use UI's and an easy to deploy solution

Part of a complete Commerce solution that enables a highly personalized buying experience from initial customer interaction through order capture and fulfillment



Selling the New IBM Call Center for Commerce

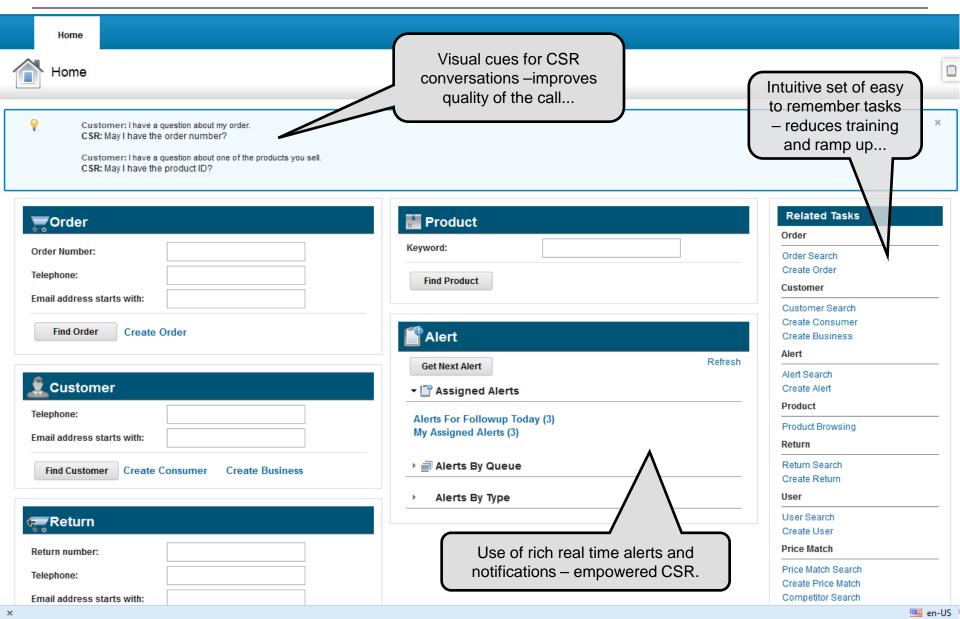
When talking with a prospect for Sterling OM or combined Sterling OM and Websphere
 Commerce customer –

IBM Call Center for Commerce is the only choice for a new customer.

- Sterling Call Center in Feb 2014 will be restricted from sale will need to obtain approval
 if existing Sterling Call Center customers want to purchase additional seats.
- List Price for IBM Call Center for Commerce = \$950 per seat
- Migration from Sterling Call Center to Call Center for Commerce
 - Entitlements are 1 to 1 of Sterling Call Center to Commerce Call Center
 - To avoid a mass migration of all Sterling Call Center customers, a special bid/notification of when your customer wants to migrate needs to be submitted to the Brand Pricer.
- Plan to End of Market Sterling Call Center in 2H2015

Smarter Commerce



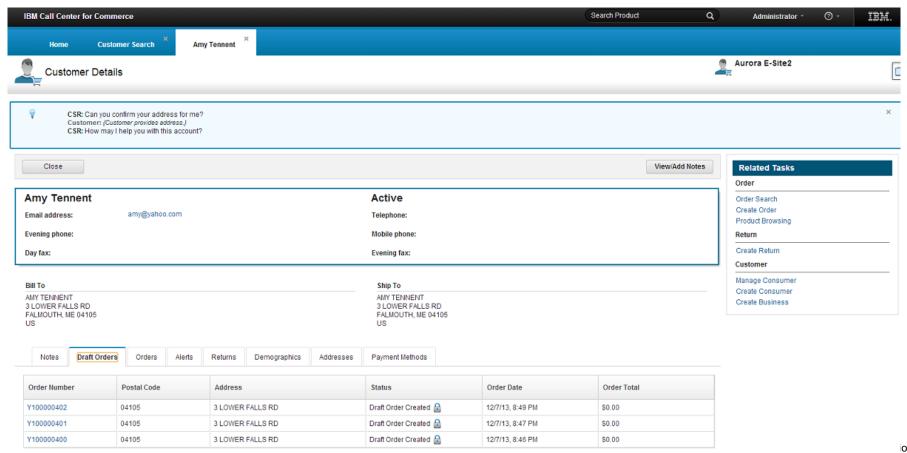






IBM Call Center for Commerce Functionality Overview - Customer

- Customer Management
 - Create/Update customer and related information (address, contact, etc.) Consumer & **Business**
 - View customer orders, carts, returns ticklers
 - View/edit customer comments/notes
 - Find customer (multiple search options)

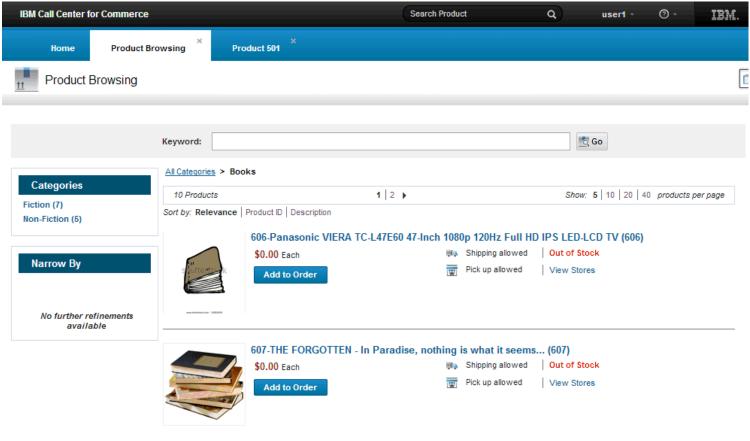






IBM Call Center for Commerce Functionality Overview - Catalog

- Catalog Management
 - Search by ID, or off index (using index... name, desc, short description, etc.)
 - Product details, inventory, related items (configurable what to show), fulfillment options, pricing info







IBM Call Center for Commerce Functionality Overview - Order Management

- Order Management (Order Maintenance)
 - View, create and update orders
 - Includes add/change/delete order lines
 - Includes store pickup
 - Manage / View notes on orders
 - Manage / View promotion codes for orders
 - Apply associations/related items to an order
 - View order history
 - Support to expedite order/items
 - Items price override
 - Shipping price override for orders
 - View shipping and tracking information
 - Store locator and stock details
 - Manage Charges, Change/Add Payment methods

Related Tasks

Frequently Asked Questions

Where is my shipment?

Why was I charged?

Order

View Order Summary

Change Payment Method

Change Gift Options

View All Invoices

Create Order

Cancel Products

Add/Remove Promotions

Add Lines to Order

Change Order Address

Resolve Holds

Apply Holds

Manage Charges

Change Product Variation

Appease Customer

Return

Create Return

Fulfillment

Change Fulfillment Options

Price Match

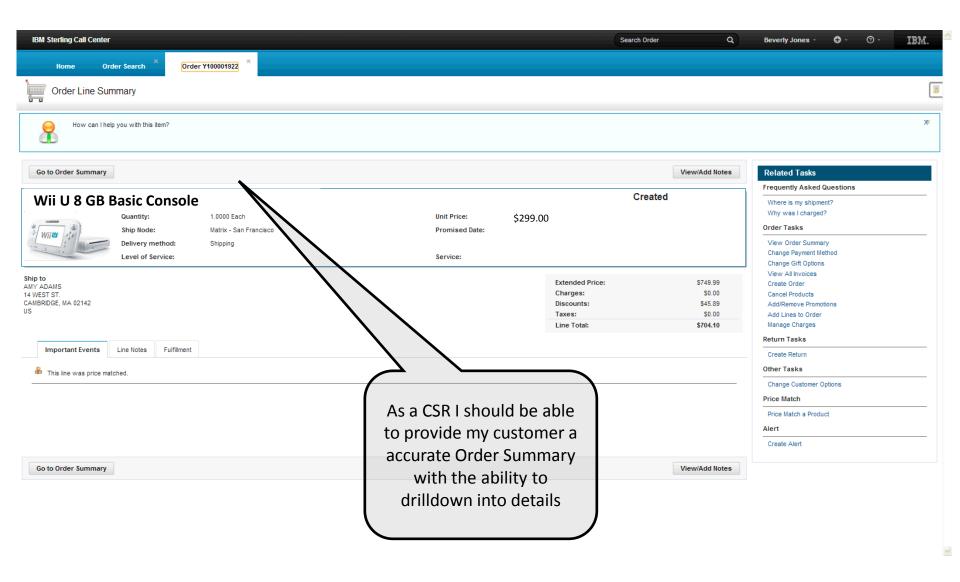
Price Match a Product

Alert

Create Alert

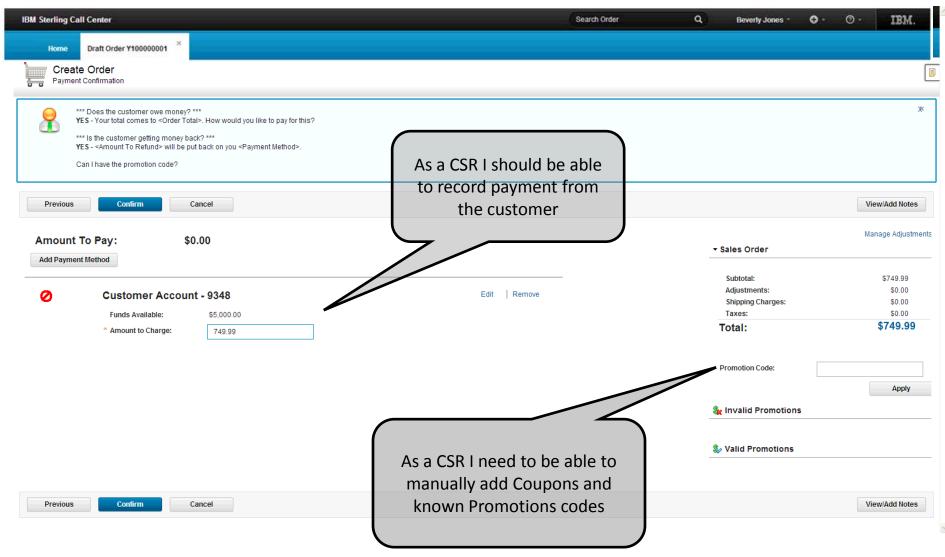


Order Entry – Order Summary



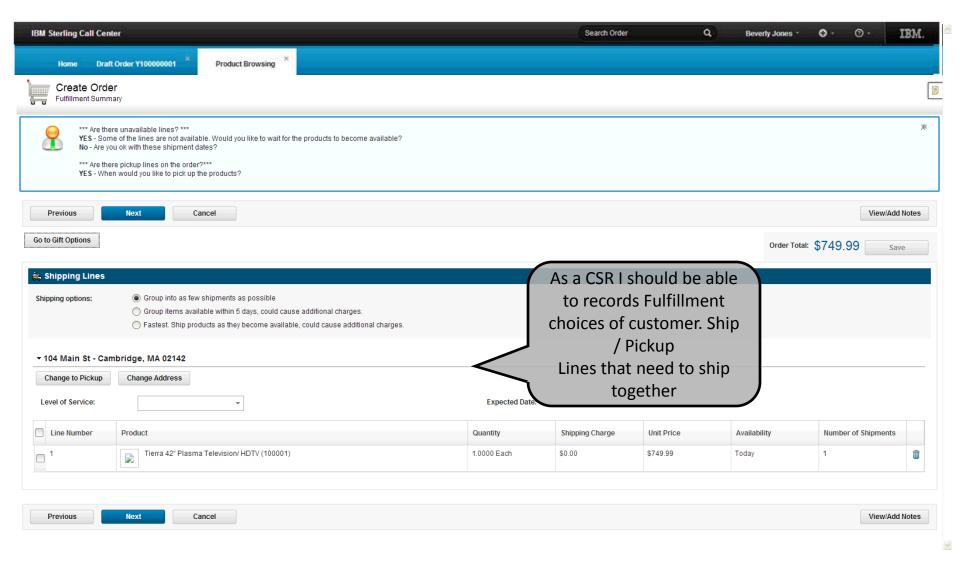


Order Entry – Payment Confirmation





Order Entry – Fulfillment Summary



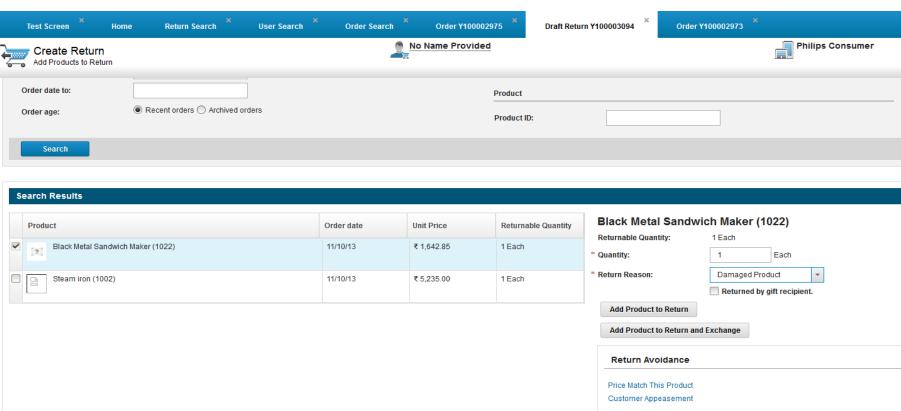




IBM Call Center for Commerce Functionality Overview — Returns

Returns

- Create return and exchange order
- Provide refund options
- Find returns
- Support shipping charges in refunds
- Ensure multiple refund transactions cannot be done against same order item







Alert

Assigned Alerts

Alerts For Followup Today (0)

Alerts By Queue

Customer Notification (1)

My Assigned Alerts (0)

Duplicate Order (0)

Reship Items (0) Stop Delivery (0) Verify Address (0)

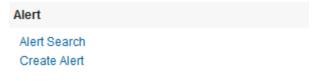
IBM Call Center for Commerce Functionality Overview

Ticklers/Alerts & User Mgmt

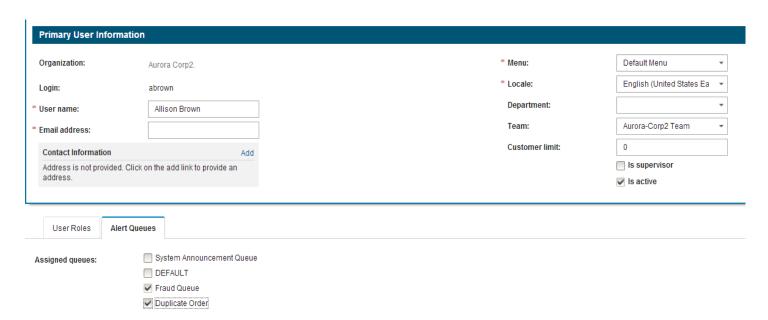
Alerts/Ticklers –

View my ticklers, pull, work on, resolve

- Create & Manage queue, priority, user etc...
- Search, notification, groupings by type, queue.



UserUser SearchCreate User





Fully Extensible User Interface

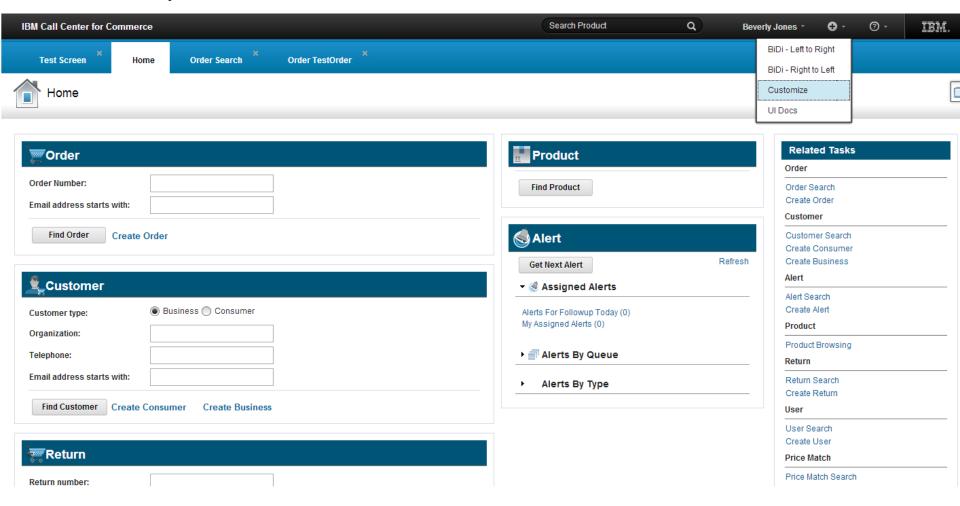
- Major focus on allowing customers to extend the UI
- Simple extension environment setup
- Reduced proprietary knowledge required to extend
- Two modes of extensibility:
 - Full
 - Incorporate new custom screens
 - Copy and/or replace out of the box screens
 - Open out of the box screens from custom screens
 - Etc.

- Differential

- Add components and logic to out of the box screens without copying the entire screen. Only differential extension is saved – you only own the extensions.
- Makes upgrade easier as out of the box screen can be updated while leaving the customizations in place.

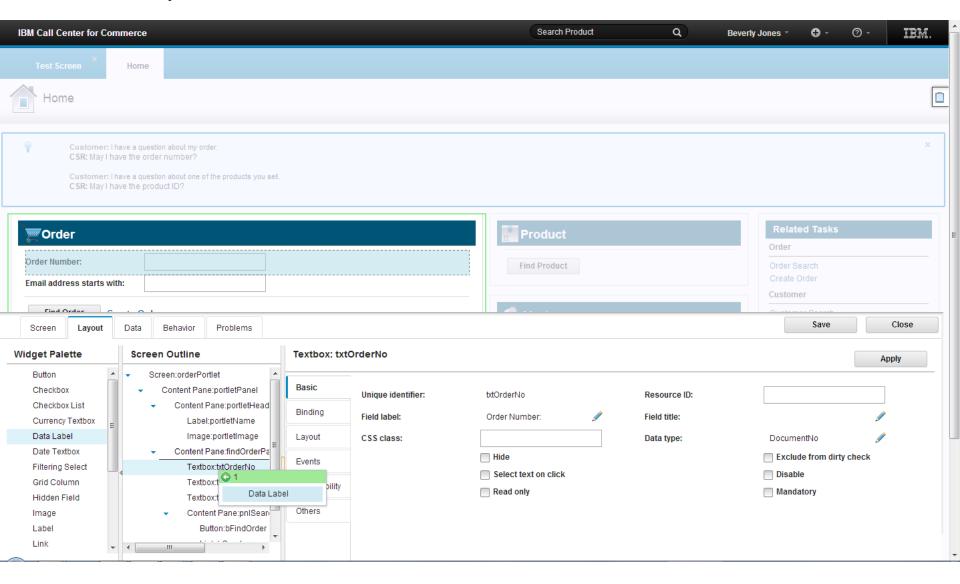


Extensibility Workbench



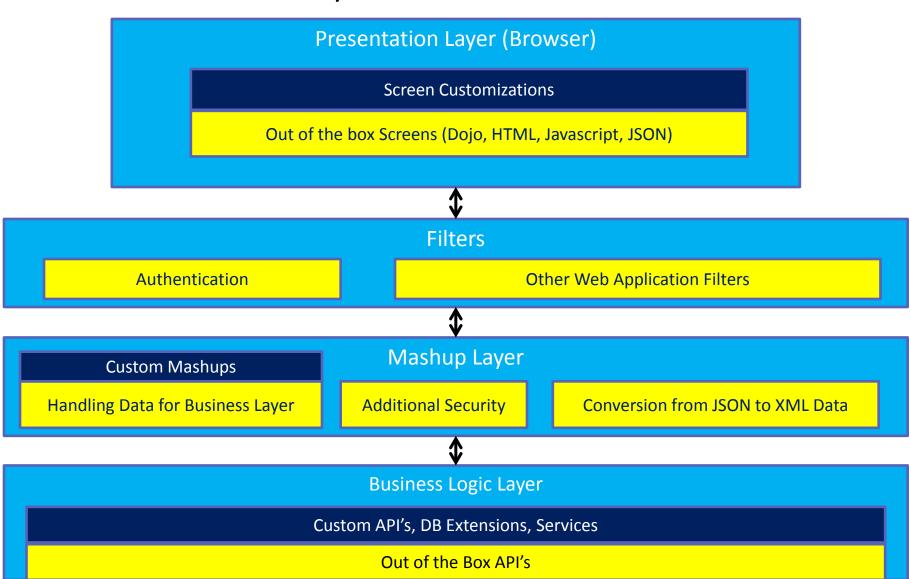


Extensibility Workbench





Architecture Extensibility





Sterling OM and Call Center for Commerce Reference Information

- Combined Commerce Solutions Internal Announcement published January 2, 2014
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- Software Sellers Workplace (Sales Kit) https://w3-03.sso.ibm.com/software/xl/myportal/!ut/p/c5/04_SB8K8xLLM9MSSzPy8xBz9CP0os3gjA 3dXrzAnL1e3EFMDA89gSy_jEBcfAwN3I6B8pFm8s7ujh4k5UMDC09nEwNPEyT_lyNUfqNIY Rbd5gl8LULeHT0CYZZixgaEhRLcBDuBoQMDucJBr8dsOksdjvp9Hfm6qfkFualRBlokiALNcHic !/dl3/d3/L2dBISEvZ0FBIS9nQSEh/?nav.selection=/industrysolutions
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- New Hire Commerce Sellers Information https://w3-03.sso.ibm.com/software/xl/myportal/content?synKey=T279955E76850X46