



Siebel 8.0 Upgrade – An Australian Case Study

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LION NATHAN



Agenda

Business

- Who is Lion Nathan
- History of Siebel in Lion Nathan
- Business Drivers for Upgrade

Technical

- Technical Drivers for Upgrade
- Project Plan
- Experiences and Challenges
- Post Implementation Challenges
- Key Learnings
- Future Positioning

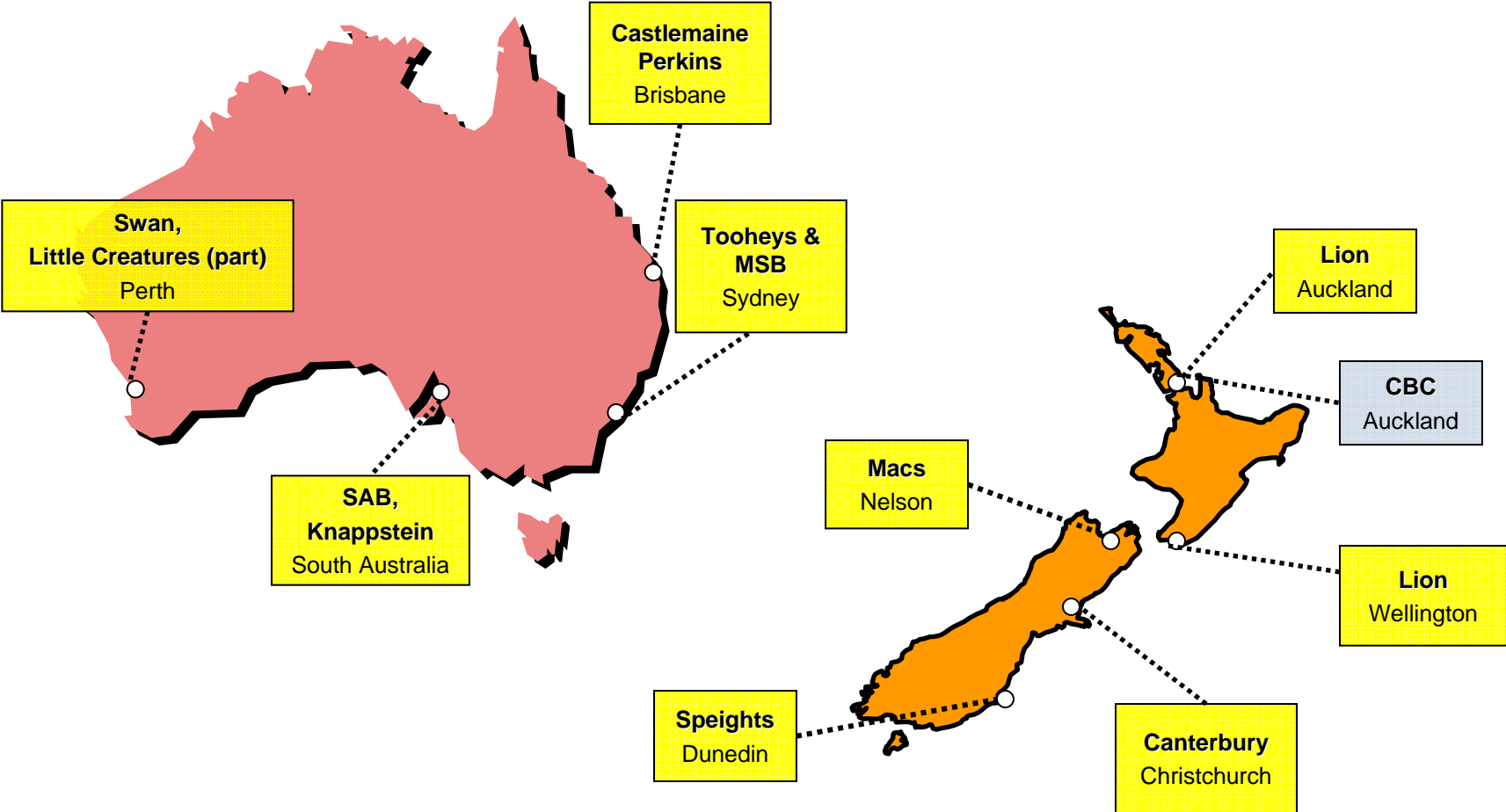
Who is Lion Nathan?



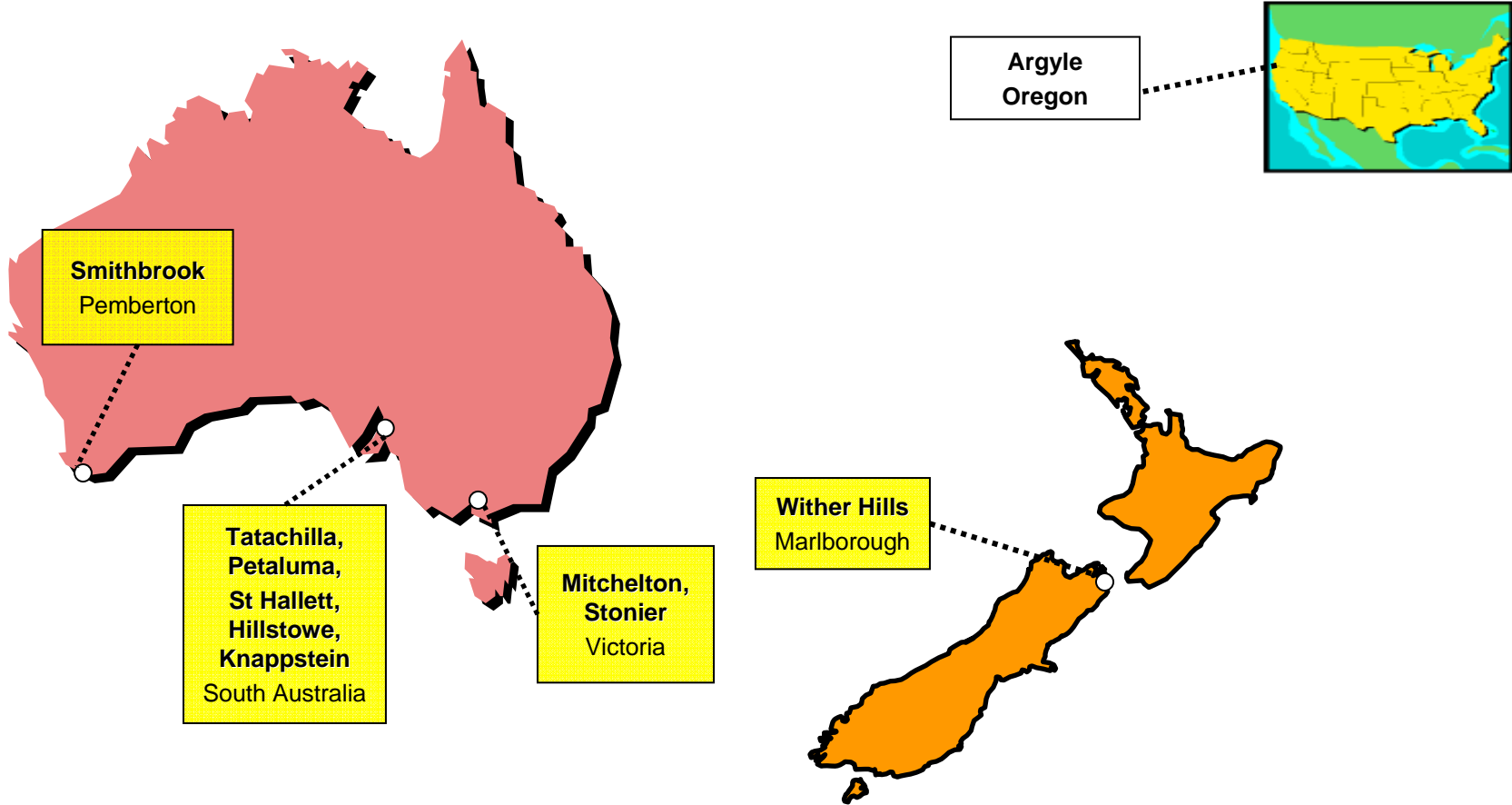
Who is Lion Nathan?

- 2,800 people primarily across Australia/New Zealand
- 12 Breweries
- 10 Wineries
- includes LNWS / CBC / Bacardi-Lion / Heineken Lion
- Liquor King stores in NZ
- A\$1.97 bn sales revenue
- A\$452.7m EBITA
- A\$282.1m NPAT

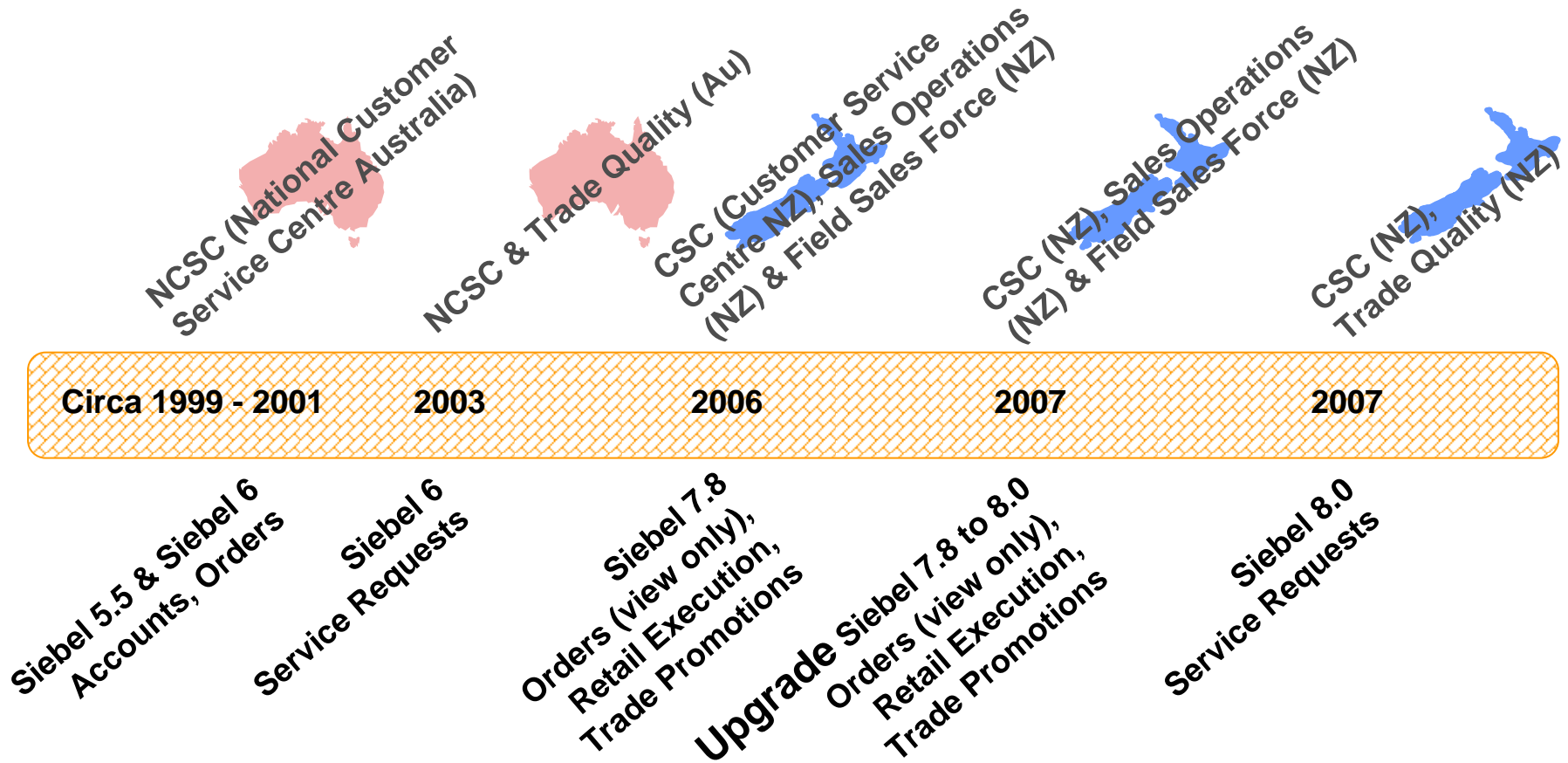
Our Breweries



Our Wineries



Lion Nathan's Siebel Journey to date



The Upgrade Project

- Approach
 - Applets, views and screens inventory
 - Upgrade development and QA environments
 - Testing
 - Deployment to production
- Key Issues – pre-implementation
 - Change management – Siebel Find not available in 8.0
 - New Siebel Search functionality not functioning
- Key Issues – post-implementation
 - File corruption on in-field tablets → inability to sync

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Decision on Platform Foundation

Siebel 7.8

For

- System is already in place
- Minimise Change Issues
- Avoid additional project costs

Against

- Eventually will have to perform upgrade

versus

Upgrade to Siebel 8.0

For

- Service Oriented Architecture enhancements
- Task based UI, natural language rules engine and integration enhancements
- Support of new Windows/SQL Server stack

- 'Special attention' from Oracle

Against

- At the time it was a new release application



Next Question

Reimplement vs Upgrade?

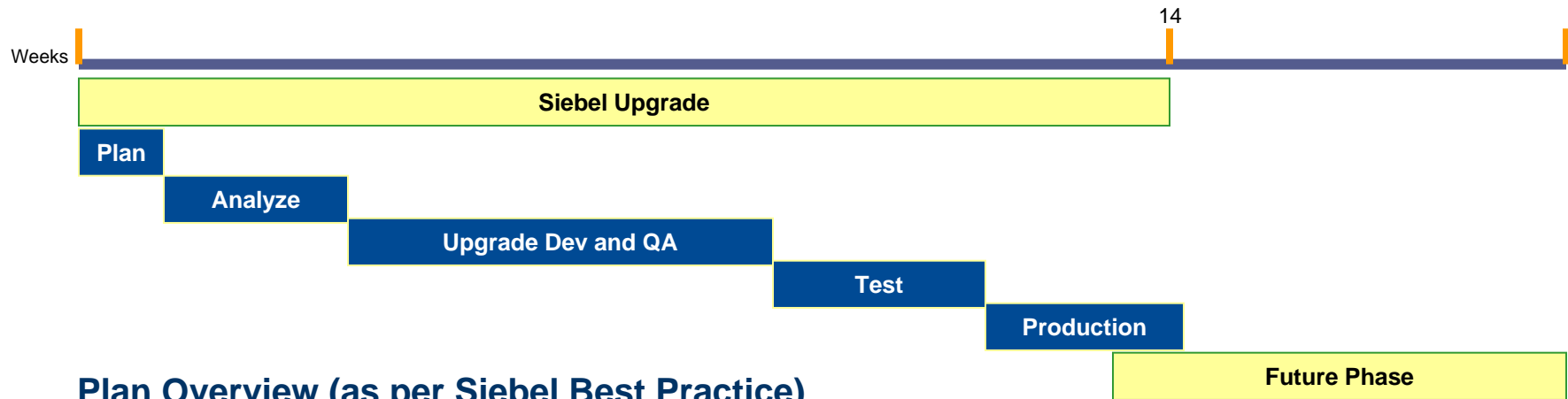
Typical reasons for upgrade

- No big changes in business processes
- Customisations need to be preserved
- No big platform changes in Siebel architecture

Typical reasons for re-implementation

- Business needs have changed since initial implementation of Siebel
- Combine multiple implementations of Siebel into one
- Customisations in old version is provided as part of new Siebel vanilla functionality

Project Plan



Plan Overview (as per Siebel Best Practice)

- Plan
- Analyze
 - Perform a trial run
 - Inventory all applets, views and screens
- Upgrade Development/QA
 - Follow the upgrade flow
 - Upgrading the QA environments a good benchmark for Production
- Test
 - Regression testing
 - Change Management
- Upgrade Production
 - Follow the upgrade flow

Experiences & Challenges

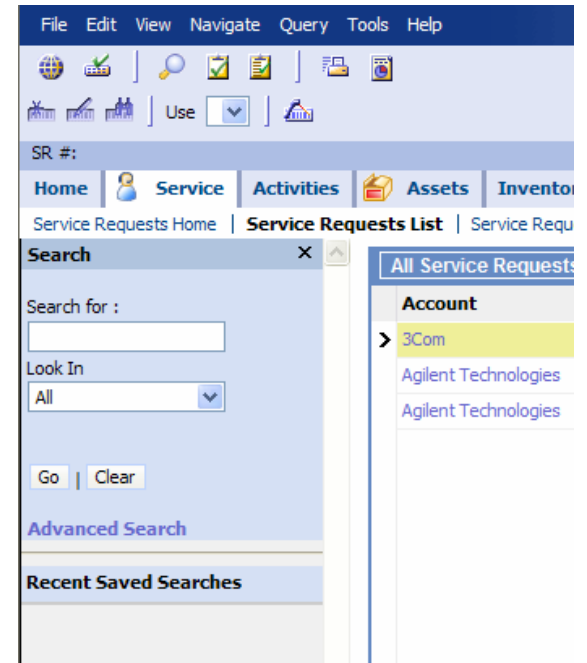
Siebel Search

Siebel 8 New Search

- Note on new search functionality
- Supports Oracle Secure Enterprise Search (SES) and FAST Instream Search out-of-the-box
- Visibility rules applied to search criteria so users only see results that they are entitled to see

Challenges

- The old Siebel Find (Ctrl-F) not available in Siebel 8
 - Change Management Issues
- Object Searches not supported initially in Siebel 8
- Bugs in FAST Instream Search
- Resolution
 - CTI Integration Fixed with Patch
 - Use Query by Example



Experiences & Challenges

User Interface

- Change to softer Colour Scheme in Siebel 8
- Grid lines not as visible as previous versions
- Adopted stick to vanilla approach
- However, the new interface grows on you after a while ...



My Accounts ▾ Menu ▾ New Delete Query						
	New	Name ▲	Site	Parent	Main Phone #	Status
>		A & E Department	Chelsea & Westmin	Chelsea & Westmin	+1(208) 442-6401	Active
		A & E Department	The Royal Brompton	The Royal Brompton	+1(207) 539-5822	Active

Experiences & Challenges

Web Templates

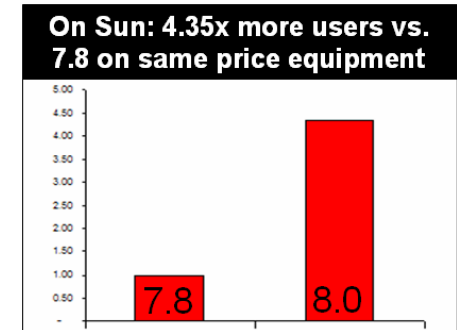
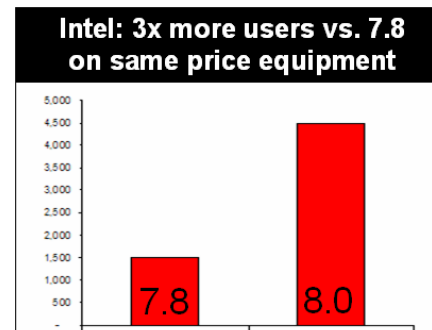
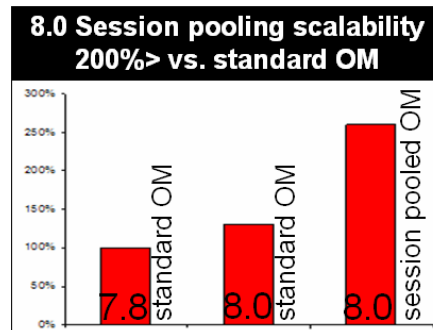
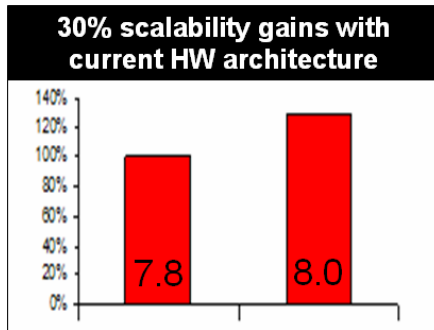
- Repository definitions are migrated
- Web Template customisations are not migrated
- Must be copied manually to new system
- Recommendations
 - Document changes to ease future upgrade process
 - Minimize changes to Web Templates



Experiences & Challenges

Performance

Siebel 8.0 Cuts Hardware Costs



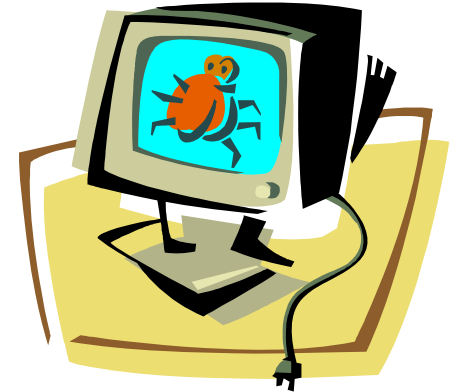
Challenges

- Performance Issues
 - Siebel App Server crashing every 2 days
 - Problem pinpointed as a memory leak
 - Fixed with a Siebel Hot Fix

Experiences & Challenges

Patch Management

- Applied 4 Hot Fixes in total
- Bugs we found were escalated to Siebel Support via Siebel TAM
- Being the first implementing Siebel 8, Hot Fixes were promptly build
- Turn around time for each custom Hot Fix ~4 to 6 weeks due to regression testing time
- Stringent Patch Management process adopted
 - Ensure that applied HotFixes in sync with to-be released Maintenance Pack



Experiences & Challenges

Deployment

- Deployment was to ~220 NZ users
- 130 were Siebel Remote users
 - Tablet PC
- Siebel Anywhere was considered but not used
 - Too risky if things go wrong
 - Not high powered tech users
- Database extract required for each user
- Cutover coordinated in time with sales meetings
 - Opportunity used to update not just Siebel but to fix other software issues
- Side benefit is upgrade fixed old Siebel 7.8 Anywhere bug
 - Allows LN to use Siebel 8.0 Anywhere to deploy SRF refreshes in future



Experiences & Challenges

Case Sensitivity/Insensitivity

- Case Sensitivity/Insensitivity setting used in Siebel application search
- Setting Case Insensitivity increases load on database
 - However, allows for more complete search results
- In Siebel 6.0/7.8, set at global level
- Siebel 8.0 has greater flexibility - allows for specification **per field** by defining in Siebel Tools
- Work with users to identify fields that need to be set



Experiences & Challenges

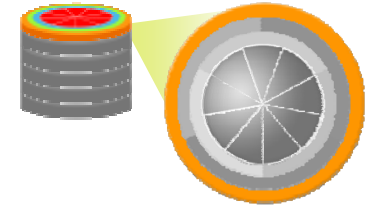
Siebel Integration - SOA

- Siebel 8
 - SOA-enabled CRM
 - Fusion Middleware Certified
 - Application Deployment Management
 - Performance, Scalability and Reliability for Multi-channel CRM
- Lion Nathan
 - All Siebel – TIBCO EAI integrations upgraded from old COM based adapters to TIBCO Web Services Adapter
 - Allows for leveraging of benefits of SOA architecture



Service Oriented Architecture

Infrastructure Enhancements for SOA



Session Multiplexing for Web Services

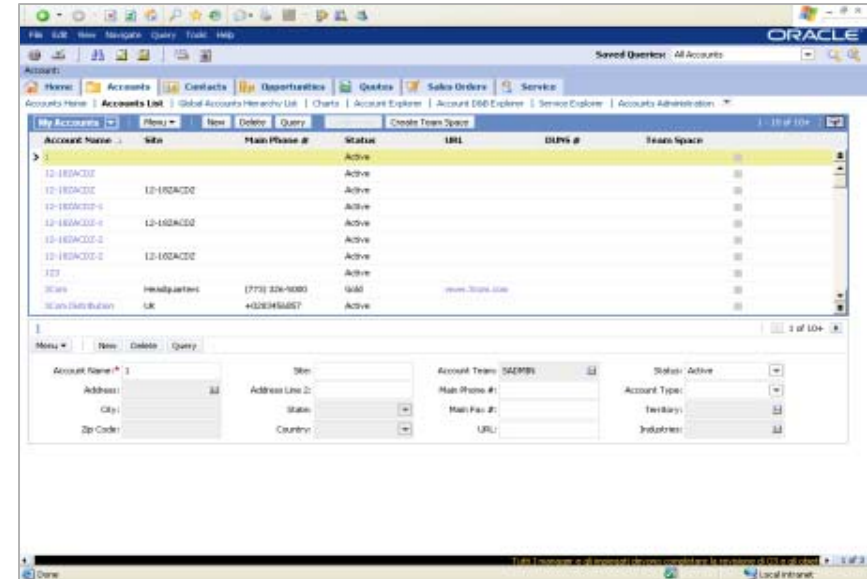
- Reduce Memory consumption in the server
- Ideal for Batch based web service transactions

Access Control on Web Services

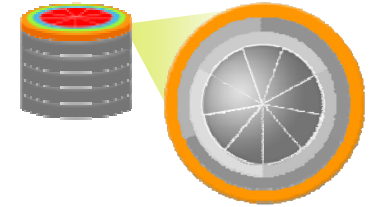
- Standard Access control pattern
 - User's position and responsibility determines the access
 - Constraint on data retrieved by the Web Service
 - Full Audit on Web services

Large File Attachment Support

- Reduced memory consumption owing to stream processing of large file attachments and documents



Service Oriented Architecture



Web Service Wizard

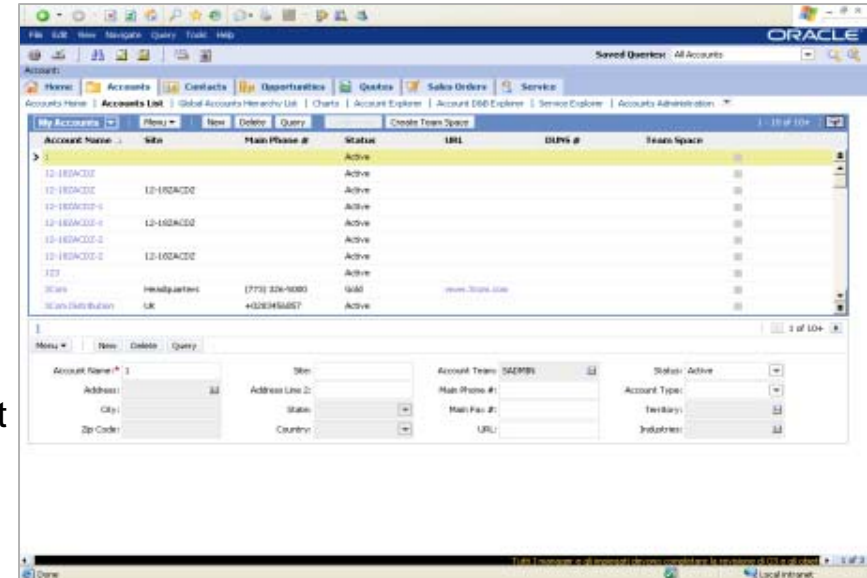
- Outbound web service created via WSDL file
- Business Services (BS) and Workflows (WF) can be exposed as web services

Property Set Hierarchy Input/output Support

- For BS/WF based web services
- New data converter service methods to support property set to Integration Object Hierarchy conversion and vice versa

Integration Object Definition Wizard

- Takes an IO as a skeleton and completes the definition (e.g. adding xml tags, ordering, etc.) to be used for describing property sets



Post Implementation Challenges

- Mobile Clients Stopped Synchronising
 - Corrupted dx files sent to mobile client could not be applied
 - Corruption caused by specific steps on web client
- Temporary Fix Program Built
 - Lion Nathan and Siebel built
- Patch Built for Lion Nathan's Specific Version of Siebel

Key Learnings

- Make sure to include appropriate business time to regression test the upgrade
- Make sure vendor support is available if you are using third party CTI or EAI applications such as TIBCO
- Work with Siebel TAMs to identify Siebel modules that have changed from your previous / old versions of Siebel eg Siebel Find from 6.x and 7.x are not available in Siebel 8
- Work with Siebel TAM/Tech Support to obtain list of bugs and patches that you need to apply
- Set aside cost and effort in re-implementation of all customisation provided by expert services such as new routing rules for remote clients.
- Make sure to budget for management of Siebel product defects (resource time/testing time/TAM time)
- Make sure you identify all supported 3rd Party software such as Java Run Time files to be included in the tasks for Siebel upgrade



The Future

How Lion Nathan Is Positioned Now

- A strategic CRM platform in place
 - Supports Lion Nathan's dynamic business environment
 - SOA Enabled Architecture for business agility
 - Supports corporate goal of equipping sales force with best systems to maintain leadership position in drinks industry
- Working on leveraging new functionality in Siebel 8
 - Pricing & Order Management (current project)
 - New Signals Based Architecture
 - Driving greater efficiencies in Order to Cash process
 - Supports pricing/discount strategies of business
 - Helps manage complexity of order process / pricing policies
 - Task Based UI
 - Helps drive consistent customer service processes
 - Lowers training costs of new users
 - Ensures execution of each step in business process
 - Territory Management
 - Improving management of sales territory processes
 - Leverage enhancements for geography, product and industry rules
 - Define alignment approval flows



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Q & A