(22C) Oracle Fusion Cloud Sales Automation: Implementing Partner Relationship Management (PRM)

Oracle CX Sales and B2B Service

DURATION	MODULES	COURSE CODE
2 Days	**14 Lectures**	**—**

Course Overview

The Partner Relationship Management (PRM) course first provides an overview of Oracle CX Sales Partner Relationship Management (PRM) functionality, and how it benefits PRM users. It then describes how to create partner accounts and partner users, and how territories are used to assign internal employees to work with partners, and to assign partners to work on leads and opportunities. The course covers leads and opportunities as they relate to partners, and also the partner-specific deal registration object. Once partner-specific functionality for the standard sales process has been covered, the course details additional partner-specific functionality: Partner programs used to provide performance incentives for partners, business plans to assist partners in setting specific performance goals, and marketing development funds to assist partners in marketing your product. At the end of the course, partner-specific aspects of analytics, Oracle Social Network, Oracle CX Cloud Mobile, and web services are discussed.

What You Will Learn

Course Introduction

- Lesson Agenda
- Course Audience
- Course Prerequisites
- Course Goal
- Course Objectives
- Course Methodology
- Course Materials
- Course Agenda
- References

Overview

- Objectives
- Working with Partners

- Challenges in Working with Partners
- Oracle Cloud Partner Relationship Management
- Oracle's Partner Experience
- Partner Recruitment
- Partner On-Boarding
- Partner Program Enrollment
- Business Plans
- Marketing Development Funds
- Sales Execution Tools
- Deal Management
- Dashboards and Analytics
- Roles
- Review: Partner Flow
- Lesson Highlights
- Practice

Manage Partners

- Learning Objectives
- What's It All About?
- Enable PRM
- Create the Channel Managers
- Partners
- Partner Account
- Steps to Create a Partner Account
- 1. Create a Prospective Partner
- 2. Register the Partner
- 3. Activate the Partner
- Partner Contact
- Partner User
- Create Partner Contacts and Users
- 1. Create Partner Contacts
- 2. Activate the Partner
- 3. Make One of the Contacts a Partner Administrator
- 4. The Partner Administrator Creates Partner Users
- Verifying Access
- Impersonation
- Lesson Highlights
- Practice

Partner Configuration

- Objectives
- What's It All About?
- Partner Service Requests
- Example: Partner Service Request Layout
- Partner Activities

- Partner Assessments
- Partner Assets
- Lesson Highlights
- Practices

Partner Territories

- Learning Objectives
- What's It All About?
- Review: Territories
- Review: The Territory Hierarchy
- Review: Territory Types
- Assign Partners to Channel Account Managers
- Coverage Models
- Partner Assignment
- Configure Partner Assignment Mapping
- Partner Business Use Case: Partners Manage Leads
- Partner Business Use Case: Channel Account Managers Manage Leads
- Default Object Assignment
- Alternative Assignment
- Lesson Highlights
- Practice

Leads

- Learning Objectives
- What's It All About?
- Review: Lead
- Lead Lifecycle in Oracle PRM
- 1. A Lead is Created, Generated, or Imported
- 2-3. The Lead is Assigned to a Channel Account Manager, Who Assigns it to a Partner
- 4. The Partner Qualifies and Works the Lead
- 5. The Partner Converts the Lead
- Administrator Tasks
- Configure Lead Assignment Options
- Other Lead Options
- Configure Lead Page Layouts
- Configure Smart Actions
- Email Integration
- Lesson Highlights
- Practice

Deal Registrations

- Learning Objectives
- What's It All About?
- Deal Registration

- Deal Registration Lifecycle in Oracle PRM
- 1. A Lead is Converted to a Deal Registration
- 2. The Deal Registration is Submitted for Approval
- 3. The Deal Registration is Converted to an Opportunity
- 4. Partner Works the Opportunity
- Administrator Tasks
- Configure Deal Registration Profile Options
- Create a Deal Registration Assignment Rule
- Lesson Highlights
- Practice

Opportunities

- Learning Objectives
- What's It All About?
- Review: Opportunity
- Opportunity Lifecycle in Oracle PRM
- 1. A Deal Registration is Converted to an Opportunity
- 2. Optionally, Assign Additional Resources
- 3. The Partner Works the Opportunity
- 4. The Partner Closes the Opportunity
- Administrator Tasks
- Configure Opportunity Profile Options
- Specify the Sales Method Used by Partners
- Lesson Highlights
- Practice

Partner Programs

- Learning Objectives
- What's It All About?
- Partner Programs
- Partner Program Attributes
- Partner Program Elements
- Tier
- Benefit
- Create a Partner Program
- 1. (Optional) Configure Tiers
- 2. Create Benefits
- 3. Create the Program
- 4. Associate Benefits with Tiers
- 5. Publish the Program
- Enrollment
- Administrator Tasks
- Configure Partner Program Lookups
- Create Partner Page Layouts
- Lesson Highlights

- Practice

Business Plans

- Learning Objectives
- What's It All About?
- Business Plans
- Business Plan Attributes
- Business Plan Elements
- Objectives
- SWOT Analysis
- Notes and Activities
- Create a Business Plan
- 1. Create the Plan
- 2. Add Objectives
- 3. Add SWOT Entries
- 4. Perform Approvals
- Business Plan Attainment
- Administrator Tasks
- Configure Business Plan Lookups
- Configure Objective Types
- Lesson Highlights
- Practice

Marketing Development Funds

- Learning Objectives
- What's It All About?
- Marketing Development Funds (MDF)
- MDF Life Cycle
- MDF Elements
- MDF Budget
- MDF Request
- MDF Claim
- MDF Settlement
- MDF Flow
- 1. Create and Activate a MDF Budget
- 2. Create and Submit an MDF Request
- 3. Approve MDF Request and Associate with a Budget
- 4. Submit MDF Claims
- 5. Approve MDF Claims and Create MDF Settlements
- Monitoring MDF Progress
- Administrator Tasks
- Modify MDF Approval Flows
- Set Up Approval Groups
- Set Up Approval Workflows
- Configure MDF Pre-Approval Validations

- Lesson Highlights
- Practice

Additional Topics

- Learning Objectives
- Partner Hierarchies and Relationships
- Partner Hierarchy
- Partner Relationships
- Partner Announcements
- Edit Partner Announcements
- Saved Searches
- Partner Analytics
- Example: The Channel Account Manager Dashboard
- Partner Subject Areas
- Lesson Highlights
- Practice

Web Services

- Learning Objectives
- What's It All About?
- Web Service
- Types of Web Services
- Available Web Services and Applications
- Partner Self-Registration
- Additional Partner Web Services
- Lead, Deal Registration, and Opportunity Web Services
- Partner Program Web Services
- Business Plan Web Services
- MDF Web Services
- Lesson Highlights
- Practice

Visual Builder Cloud Service

- Objectives
- What's It All About?
- Visual Builder Cloud Service (VBCS)
- VBCS and Visual Builder Studio
- Oracle Partner Finder
- Configure the Fusion Application
- 1. Create the Partner Finder User
- 2. Configure Adaptive Search
- Set Up Oracle Visual Builder Cloud Service
- 1. Register Your Fusion Application with VBCS
- 2. Create a New Partner Finder Application
- 3. Set Up Authentication for Partner Finder