

Modernizing customer relationship management implementations does not require a costly, high-risk, or complex transformation to SaaS solutions. The latest innovations in continuous release architecture enable companies to leverage modern UX, automation, and AI at a fraction of the SaaS migration cost.

# Modernize Your Mission-Critical CRM: Protect Investments and Prepare for the Future

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## Introduction

Changes in consumer and employee expectations are forcing businesses to modernize their applications for greater ease of use and productivity. Customers expect more intuitive self-service experiences, and employees expect mission-critical systems to be as easy to use as a smartphone app. These are powerful trends forcing many companies to move to cloud solutions. However, modernizing the user experience (UX) and leveraging an AI-powered customer relationship management (CRM) platform to address consumer expectations of a frictionless experience across multiple channels do not require wholesale architectural transformation. Cloud migrations from an older, highly customized mission-critical CRM application to SaaS solutions can require rebuilding processes, customizations, and integrations.

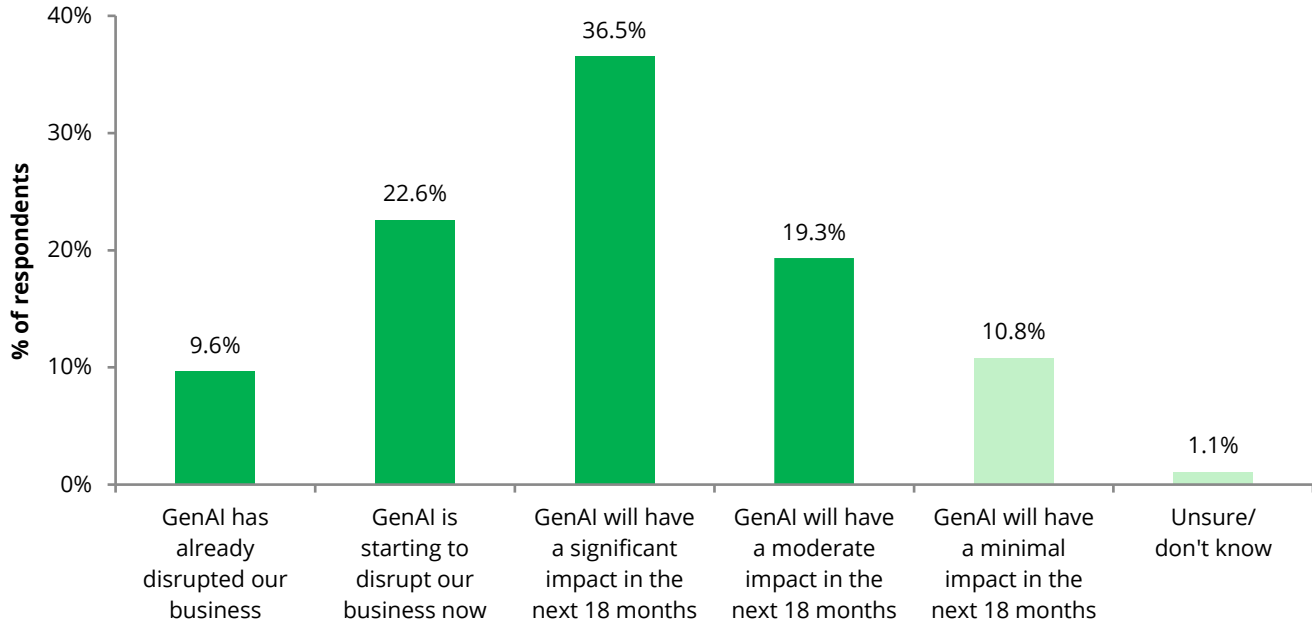
A faster, lower-risk, and lower-cost approach is to enhance customer experience (CX) capabilities, modernize the UX, and add new AI capabilities to an organization's existing core customer applications, such as Siebel CRM. Organizations that embrace AI will accelerate growth, solve complex challenges, and create exceptional customer experiences. However, successful AI is heavily dependent on good data, infrastructure, and compliance with regional laws and regulations, as well as being cost effective. By taking simple steps to modernize, organizations can safely continue to reap the benefits from their existing investment and leverage new capabilities for process optimization, workflow automation, and AI-powered productivity. Nearly 90% of enterprises surveyed by IDC already see or expect AI and generative AI (GenAI) to disrupt their businesses in the next 18 months, so it is vitally important to embrace this trend (see Figure 1).

## AT A GLANCE

### KEY TAKEAWAYS

- » Modernizing the UX and leveraging an AI-powered CRM platform to address consumer expectations of a frictionless experience across multiple channels do not require wholesale architectural transformation.
- » Nearly 90% of enterprises surveyed by IDC already see or expect AI and generative AI to disrupt their businesses in the next 18 months, so it is vitally important to embrace this trend.

FIGURE 1: **Nearly 90% of Enterprises Expect GenAI to Disrupt Their Businesses in the Next 18 Months**



*n* = 881

Note: Data is weighted by IT spend (500+ employee size).

Source: IDC's Future Enterprise Resiliency and Spending Survey, Wave 1, January 2024

## Benefits

An approach to the modernization of Siebel CRM can satisfy the needs of both IT and the business.

For IT, it can help to:

- » Avoid risk, cost, and the complexity of moving highly customized processes to SaaS
- » Retain the value of existing IT resources, business process validations, and related systems
- » Customize or extend aspects of business functionality through microservices or expose more business services through APIs
- » Enable a simpler "lift and shift" to cloud infrastructure, deploying with containers and Kubernetes architecture, reducing costs, and improving application performance
- » Activate data with AI/ML and GenAI via APIs and underlying database technology where a company's core first-party customer data resides to optimize automation and work experiences
- » Leverage the extensive CRM integration capabilities, REST API, Kafka, and Open Integration that allows all manner of event communications and application processes to be exposed as APIs, including UI-level processes

- » Reduce the dependency on skills required with many open source and industry technologies available within the CRM application: low-code/no-code UX (APEX, Visual Builder, React, Helidon, Docker, Kubernetes, Kafka, AI/ML, autonomous database, and cloud infrastructure)

For business, it can help to:

- » Enable an omni-channel customer experience with an API-first approach to integrating custom or SaaS applications into the core CRM system
- » Support of omni-channel customer experiences
- » Improve the speed and quality of customer service
- » Enhance UX and simplify process flows, clickstreams, and workflows
- » Improve agility to react to changes with digital channels, data privacy regulations, and consumer behaviors
- » Provide full control of AI with an organization's private first-party business data
- » Incorporate GenAI into employee journeys and task flows to reduce manual effort

### ***Considering Oracle's Partnership with TCS and the Modernization of Siebel CRM***

Oracle acquired Siebel Systems in 2005 when it was the leading CRM solution for large enterprises. The acquisition complemented Oracle's enterprise applications business and enabled Oracle and its partners to sell a broader range of solutions. Siebel CRM is an integral part of Oracle's end-to-end industry CX strategy.

Tata Consultancy Services (TCS) has been one of Oracle's strategic partners for more than three decades. TCS offers services tailored to both industry and business processes, including consulting, implementation, and managed services, helping businesses to modernize and drive value. Its CRM modernization capabilities are designed to help enterprises enhance their customer interactions, streamline service operations, and improve overall customer satisfaction. Here's a summary of TCS' CRM modernization capabilities:

- » **CX and UX enhancement:** The Siebel CRM center of excellence (COE) at TCS is focused on enhancing the CX and UX with CRM application deployments. The team has 25+ years of CRM experience. Team members follow the agile methodology and conduct design-thinking workshops, perform heuristic evaluation, create journey maps by user persona, conduct contextual inquiries, develop low- and high-fidelity visual designs, build clickable prototypes, and perform user testing to ensure a user-centric approach. Related benefits include:
  - **A robust set of design services:** Organizations have access to a proprietary catalog of designs from TCS split across categories like guided flows, dashboards, optimized process flows, and designs for mobile devices. Organizations can use these designs to modernize their business process flows instead of starting from scratch. The TCS team can leverage Oracle's Redwood UX and extend it to create highly personalized and contextual business process flows. The product-agnostic designs can be taken for user testing and implemented using any web technology of choice.
  - **Fast time to value:** Simple pilot journeys can be conducted in an average of three weeks and complex process models in less than six months.

- **Mobile-friendly approach:** CRM applications are designed with a mobile-friendly approach to provide consistent user experiences across all devices.
- **Process optimization:** Consulting services are available to optimize business processes that interact with CRM systems to eliminate inefficiencies and improve productivity.
- **AI-powered CRM:** Oracle Cloud Infrastructure (OCI) AI services and/or extends ML models with custom AI and GenAI solutions to meet customer requirements.

In addition, TCS provides the following capabilities for CRM modernization:

- » **Migrate Siebel to cloud:** This enables migration of Siebel CRM to any of the public/private clouds, including Oracle Cloud Infrastructure.
- » **Change management:** Support for change management is offered to help organizations transition smoothly to the modernized CRM system, including support and continuous improvement practices.
- » **Consistent omni-channel experiences:** Customers are provided with a seamless experience whether they interact online, on mobile, or in person.
- » **Insights and reporting:** Advanced reporting tools and dashboards provide deep insights into user and customer experiences, helping users to make informed business decisions.
- » **Siebel upgrade:** Support for customers using older versions of Siebel is offered to upgrade to the latest versions so that they can unlock the benefits of the new Siebel CRM.

### Challenges

- » Organizations running on older releases of the Siebel CRM application will require a onetime upgrade to move to the continuous release model. A Siebel Upgrade Factory toolkit is available to reduce the time and cost associated with this upgrade. Once on the continuous release model, new innovations and bug fixes are part of monthly release updates that are much more lightweight and easier to adopt with lower effort.
- » Organizations wishing to embrace AI with their private business data may face challenges with data residency and privacy regulation. Oracle's Siebel CRM is positioned to address this need with the capability to bring AI technologies directly to the customer in their dedicated region or datacenter.
- » With the expectation that GenAI and emerging AI technologies will dramatically change how we work and connect with customers, organizations may face challenges to adopt AI technologies into their applications and task flows. The CRM modernization approach will deliver AI technologies faster and easier to organizations. This is more attractive for organizations that lack the IT resources to migrate to SaaS and do not want to incur the cost of the transformation.
- » Oracle states that it is committed to supporting Siebel CRM through 2035. However, 2035 is not an end date, and investment longevity should not be a concern for organizations. Oracle has extended this period every year since the acquisition in 2005. It is widely expected that Siebel CRM will continue to thrive for many decades to come.

## Conclusion

Rising employee and customer expectations for frictionless experiences demand that enterprises modernize their mission-critical systems. Customer experience and user experience enhancements like optimizing work processes and adding AI can improve productivity and reduce call volumes and resolution times while maintaining customer satisfaction. Examples include:

- » Streamlining click flows to save minutes per call
- » Automatic call log analysis to identify best practices for resolution and self-service
- » Predicting the next best offer for upselling and cross-selling
- » Accelerating training and onboarding time for customer service and support staff
- » Automating handling FAQs using GenAI

The successful deployment of AI services into an existing CRM application can automate parts of existing processes and task flows. This not only improves productivity and CX but can transform business units with reduced margins and uncover new areas of revenue growth. The good news is that it is not necessary to migrate mission-critical CRM applications to take advantage of innovative process automation, UX design, and GenAI. Once an environment is compatible with continuous release cycles, all these benefits can be effectively applied to on-premises systems and make them appear and function as modern cloud solutions.

Organizations that opt for CRM modernization by UX enhancements and embrace AI will accelerate growth, solve complex challenges, and create exceptional customer experiences.

## About the Analysts



### ***Gerry Murray, Research Director, Enterprise Marketing Technology***

Gerry has more than 20 years of experience in the high-tech industry as an analyst and a marketer. He provides best practice guidance to senior marketing executives at many of the world's largest high-tech companies. Gerry gives inspiring and thought-provoking presentations to help marketers perform better in the present and more effectively prepare for the future.



### ***Mary Wardley, Program Vice President, Customer Care and CRM***

Mary Wardley is a program vice president in IDC's Customer Experience group of services where she leads the Customer Care and CRM service. Mary currently researches the fields of customer service and contact center applications. Ms. Wardley is frequently asked to speak at domestic and international industry events such as trade, vendor, user, and development groups, on topics ranging from global market trends such as customer experience to specific market segments such as contact center as a service.

## MESSAGE FROM THE PARTNER

We have entered a new paradigm shift in the IT industry. The accessibility of AI for enterprise applications will dramatically improve productivity and provide insights like we've never imagined. Siebel CRM customers are well positioned to embrace their investments and move from the traditional CRM "system of record" to "system of intelligence" leveraging Oracle's full stack AI capabilities, which are available anywhere you need it to be. As we embrace this new journey, it's critically important that the implementation is effective, secure, ethical and with clear ROI. That's why our [partnership with TCS](#) is so important. They are a trusted partner that can ensure a successful transition into this exciting new world.

*Tata Consultancy Services (TCS)* is an IT services, consulting and business solutions organization that has been partnering with many of the world's largest businesses in their transformation journeys for over 56 years. TCS has over 601,000 of the world's best-trained consultants in 55 countries. The company generated consolidated revenues of US \$29 billion (FY 2024).

With over two decades of experience in providing Siebel CRM services to customers across industries, TCS has developed strong capabilities and provides complete life cycle support through advisory, transformation/modernization and optimization services. We see a rich history and a strong product roadmap supporting companies in their transformation journey to leverage Siebel CRM as their critical asset. TCS has a dedicated Centre of Excellence for Siebel CRM with a vision for innovation and digital transformation including capabilities in AI, Gen-AI, and enhancing UX experiences.



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