



# Next Generation Oracle Sales: Design Thinking Workbook



User Experience Process Re-engineering

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Public

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## Purpose

The Next Generation Oracle Sales User Experience is an entirely new way of equipping sales professionals with the tools, information and automation they need to be successful. While adopting the Next Gen Sales UX doesn't require a migration or a re-implementation of Oracle Sales, it does create an opportunity – *an inflection point* – at which you can re-evaluate how you approach your CRM design. This guide will walk you through some key considerations so you can re-imagine and re-engineer your seller experience (e.g. how can you streamline your existing lead conversation or qualification process?). We encourage customers like you, who have seen the power of the Next Gen Sales UX, to embrace the simplicity of this new experience vs. just recreating the old UI in the new one! In this guide we will explore questions like:

- **What custom fields need to be on which pages?**
- **Can any UI elements be surfaced through role-based UI?**
- **Is all your required data entry crucial for seller performance, or just down stream reporting? Is there a better way?**

While there may be a lot of re-thinking encouraged throughout this guide, there are many things you've already implemented for Oracle Sales that are already helping you move towards the Next Generation UX. For example, implementing Access Groups and Adaptive Search (which powers Workspace) are things you only had to do once, and which directly prepare you to take on Next Gen UI elements. Implementing the Oracle CX Sales Mobile application is another great example of taking on a feature that readies your organization for "Next Gen" thinking, as our mobile app uses similar tools and design patterns as the Next Gen Sales UX.

**“One of my favorite things about Next Gen Sales is the ability to get quick snapshots of the business, and then a fuller picture with Sales Dashboard.”**

**Marissa DeGennaro**  
Application Sales Manager  
Oracle

## About Next Gen Sales

Oracle has re-invented our Sales solution to better connect sellers with today's buyers.

We're making our portfolio more **connected** (across the entire selling process), the user experiences more **orchestrated** (easy and intuitive) and putting ML backed **intelligence** at the core.

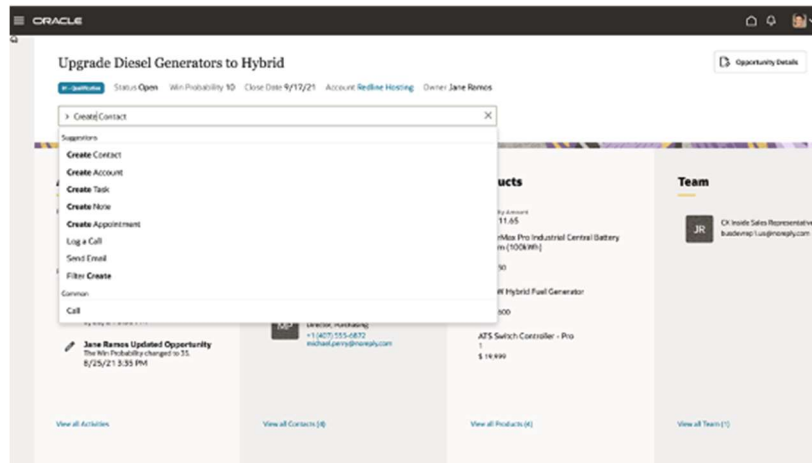


Image Caption 1. Example Next Gen Sales UX

### The Next Gen Sales UX is designed to:

- Help reps get to selling faster with a prescriptive daily springboard and a reimagined customer 360
- Do everything conversationally - every search, sales action and even navigating within the sales tool
- Unify sales preparation and outreach with a single, newsfeed style Activity Stream
- Motivate and manage performance with dynamic, gamified sales dashboards

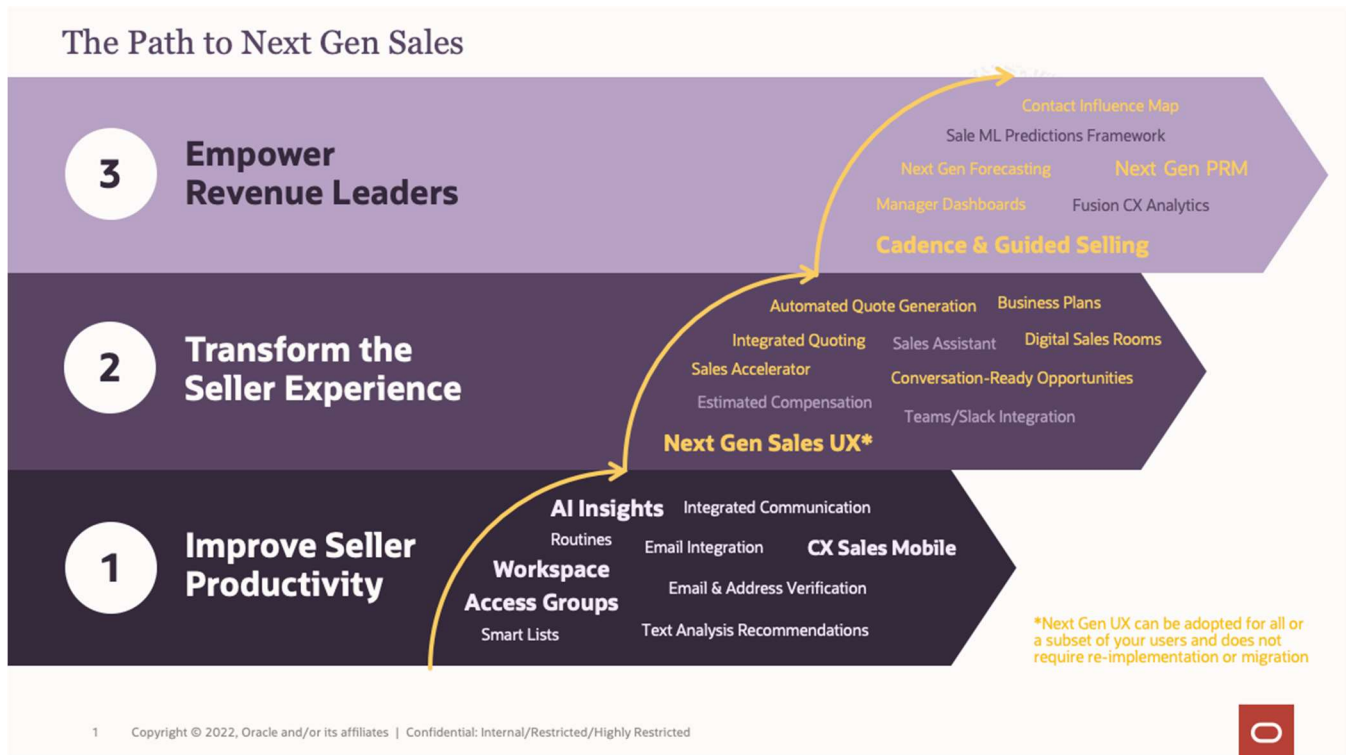
### Key Redwood User Experience Principals:

- Conversational UI
- Prescriptive, proactive
- Always contextual
- Always actionable
- Automation-forward

## The Roadmap to Next Gen Sales

Because Next Gen Sales is a UX paradigm for use with your existing Oracle Sales implementation, you have complete freedom to adopt the new UX at the time of your choosing, for all or some of your sellers (e.g. you may choose for one business division or region to adopt Next Gen Sales first before rolling out to your entire sales organization). As noted earlier in this guide, many capabilities on your adoption roadmap set the groundwork to be able to leverage the Next Gen UX when you choose to, such as Access Groups and Workspace.

Below is a sample Adoption Roadmap to help you plan. (Note: Some of these capabilities are Roadmap items that will be introduced in future updates).



## Oracle's Redwood User Experience

Awarded the best user experience at [San Francisco Design Week](#) in 2021, Oracle's Redwood UX design paradigm continues to be a collective reinvention of how our customers interact with technology and consume information. Focused on bringing state-of-the-art, consumer-grade, user experiences across devices to the enterprise scenarios, Redwood experiences touch every single interaction our customers, partners, and even employees have with the company. From voice-driven interactions to AI, Redwood is much more than a change in color scheme or branding. Redwood gives us an opportunity to set a new standard for user experience and design for the entire industry.

There are five things that make the Redwood design different from anything else you've seen before:

- **Consumer-grade.** Redwood begins with the premise that the experience of using technology in a workplace should be as intuitive, polished, and delightful as state-of-the-art experiences we have in our personal lives on our phones, tablets, and laptops. The consumer-grade bar is a high one, and we genuinely believe Redwood can exceed it.
- **Use your own words.** Redwood is designed to understand you in the language you use best—your everyday words. You don't need to understand Oracle-specific terminology or hierarchical systems. Instead, the software works to understand you and the words you use to describe tasks, places, and questions.
- **We learn from you.** Redwood learns, adapts, and gets smarter thanks to AI and machine learning. Wherever a user makes choices, Redwood makes intelligent recommendations based on a user's roles, contexts, and past behaviors.
- **Bring data to life.** Oracle has a long history of being the best at storing critical data. Now Redwood enables Oracle to be the best at visualizing data, with sophisticated insights helping you to interpret what you see, so you can make better decisions, faster.
- **Create with quality.** Finally, Redwood is not just a new user experience. It is a portfolio of tools, reusable components, and services that customers can use to customize and extend our applications or even build their own. Customers can create Redwood experiences using the very same platform Oracle engineers use.

## Thinking *Inside* the Box

A helpful exercise in thinking through how information should be displayed within the Next Gen Sales experience is to approach each object as a series of defined boxes. In this example, we'll look at **Contacts**.

### 1. The Contacts List View

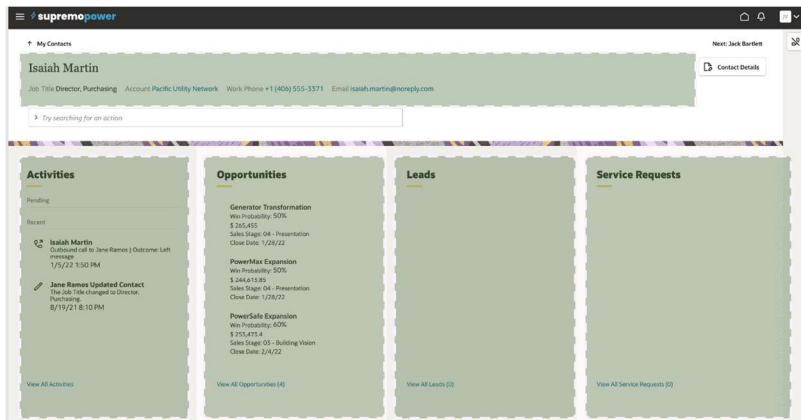
The List view is designed to help the seller locate the records that they need to work with by providing search, repeatable saved searches, and customizable visible columns, grouping and search result order.

Name	Job Title	Primary Account	Primary Phone	Primary Email	Last Call Made	Last Email Sent	Actions
Abraham Mays							...
Ann Reynolds	Director, Procurement	Redline Hosting	+1 (407) 555-3421	ann.reynolds@noreply.com			...
Bill Whitley	Director		+1 (755) 555-5985	Bill.Whitley@noreply.com			...
Ben Hughes	VP, Datacenter Operations	Redline Domains	+1 (321) 555-9872	ben.hughes@noreply.com			...
Brenda Bean	Director, Procurement	Innova Devices	+1 (210) 555-8538	brenda.bean@noreply.com			...
Bryne Price	Executive Director	Business World	+1 (845) 555-2582	bryne.price@noreply.com			...
Cameron Clark	VP, Global Procurement	Redline Hosting	+1 (407) 555-2334	cameron.clark@noreply.com			...
Cassidy Richard	Director of Real Estate and Facilities	Serendipity Inc	+1 (958) 555-1238	cassidy.richard@noreply.com			...
Chad Knight	Purchasing Manager	Redline Hosting	+1 (407) 555-6782	chad.knight@noreply.com			...
Chandler Payne	Director		+1 (958) 555-1233	Chandler.Payne@noreply.com			...
Channing Charles	Executive Director		+1 (833) 555-5561	Channing.Charles@noreply.com			...
Christine Gore	Division Manager, Facilities	Redline Hosting	+1 (407) 555-4091	christine.gore@noreply.com			...
Connor Adams	VP, North America Procurement	Serendipity Inc	+1 (555) 555-3245	connor.adams@noreply.com		1/5/22 1:47 PM	...
Cornelia Hopkins	VP, Real Estate and Facilities	JK Steel	+1 (722) 555-0586	cornelia.hopkins@noreply.com			...

This “box” is a view that’s defined through a saved search. The saved search can be made available to individual users or roles, or it can be defined by individual users for themselves, and users can designate which default saved search to display on the record landing page. The view can be defined with filters, searches, addition/omission of columns, logical groupings, Quick Action (...) menu items, etc.

## 2. The Contacts Foldout View (aka Overview)

The foldout view is the summary view of a record, providing key information, both on the record itself, as well as information connected to this record, in a single view. The focus on the foldout is not to present all information, but the *most important* information that your seller would need at a glance.



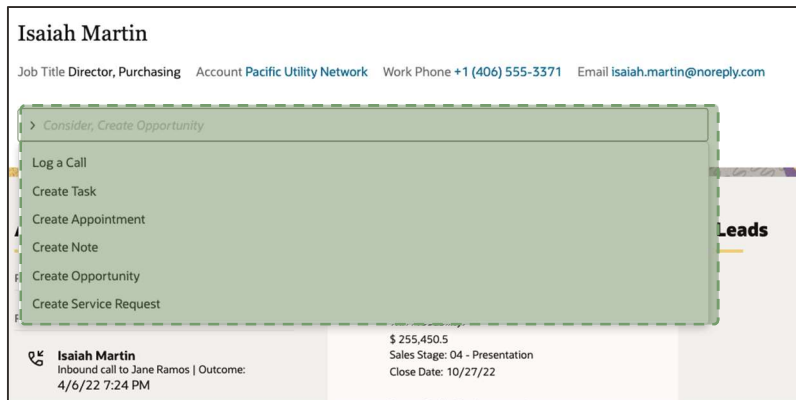
*The top box in this view shows summary information about the record and is customized/extended using Visual Builder Studio. Our best practice recommendation is to limit the fields in this box to 6 (technically, 5 fields and one badge with an example of a badge being the Current Stage badge on an Opportunity record).*

*Below the fold are panels that represent child and related objects, both standard and custom. If you need to create an additional panel, that's another box to think about on this view. Our best practice recommendation is to limit to 7 panels and always start with the Activities panel so that users can see the most important information before scrolling to the right. . The forms and fields within these panels are extended using Visual Builder.*



### 3. The Action Bar

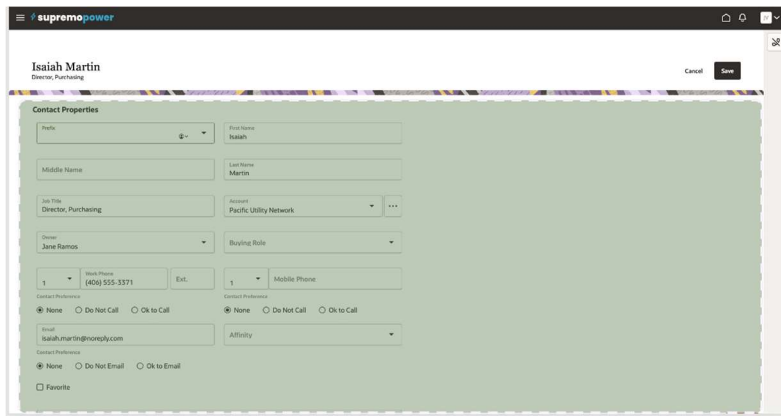
This UI element is a modern way of interacting with the application using natural language to work with the record. This takes the place of overly crowded buttons and creates a more natural and empathetic experience for the seller.



*Smart Actions in the Action Bar are defined using Application Composer. Think through where you want your different types of users to be able to navigate to from this page. Do they need to go to relevant sub-pages? Additionally, think through what actions such as record-specific Operations (such as updating a field), Communication Related Actions (such as sending an email) and Functional Actions (such as Qualify or Convert) you would like different types of users to do in context of a record type. Those may need to be added as actions in the Action Bar.*

#### 4. The Contact Details View

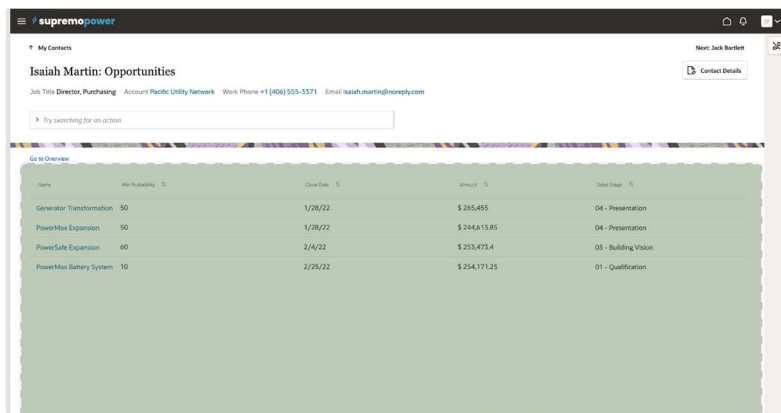
The detail view is where the record you a user is working with can be edited (for the fields and conditional fields displayed on this form). This is the type of view a user also sees when creating a new record.



*Visual Builder is used to extend this form where you can add fields, remove standard fields, change the order, etc., with conditional rendering to control which roles are able to see specific content. Fields not shown on this view can alternatively be updated using the Action Bar, so it's not necessary to include every field on this page.*

#### 5. Child and Related Lists (Sub-views aka View All pages)

The sub-views are expansions on related information to the record that remains visible above the fold (most often accesses from the View All links at the bottom of each panel). This provides access to view and edit information that is related to the record. Sub-views are commonly used to allow users to access less important related information in the absence of a Foldout Panel for that information. Sub-views are accessed using the “Show” utterance in the “Action Bar



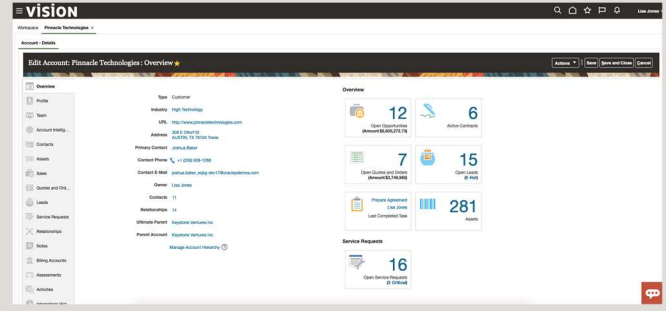
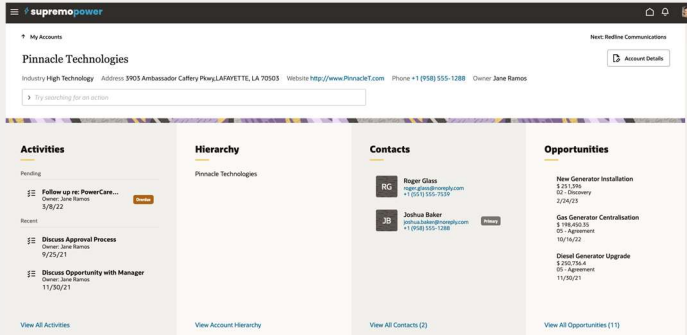
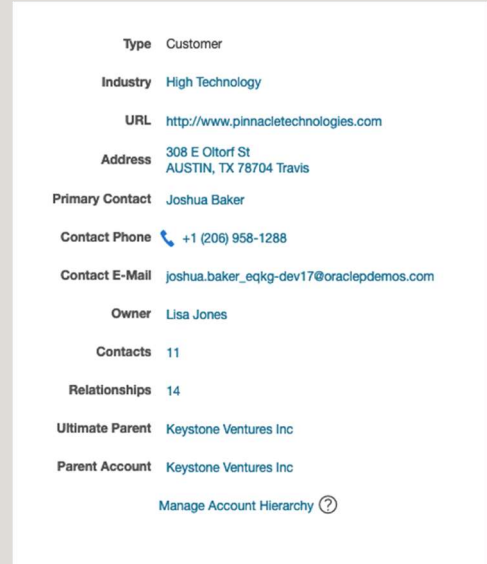
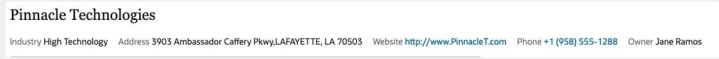
Name	Mile Incentive	Date Due	Amount	Sales Stage
Generator Transformation	50	1/28/22	\$ 265,455	04 - Presentation
PowerMax Expansion	50	1/28/22	\$ 244,611.85	04 - Presentation
PowerSafe Expansion	60	2/4/22	\$ 225,473.4	03 - Building Vision
PowerMax Battery System	10	2/25/22	\$ 254,171.25	01 - Qualification

*Visual Builder is used to extend these sub-pages for child and related objects, including the table, forms to add/create and edit, or on-page actions to delete, save or cancel.*

## Page Design Reviews

- Account Pages
- Lead Pages
- Opportunity Pages
- Contact Pages
- Seller Dashboard (by role)
- Manager Dashboard

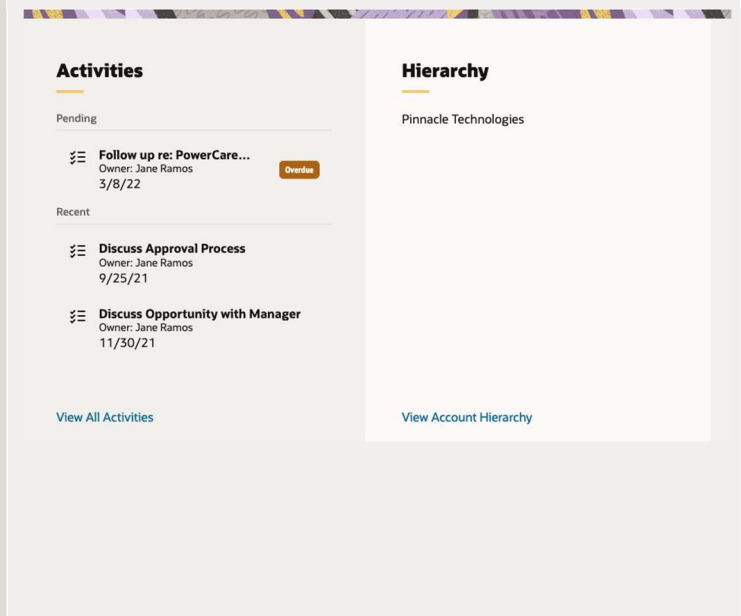
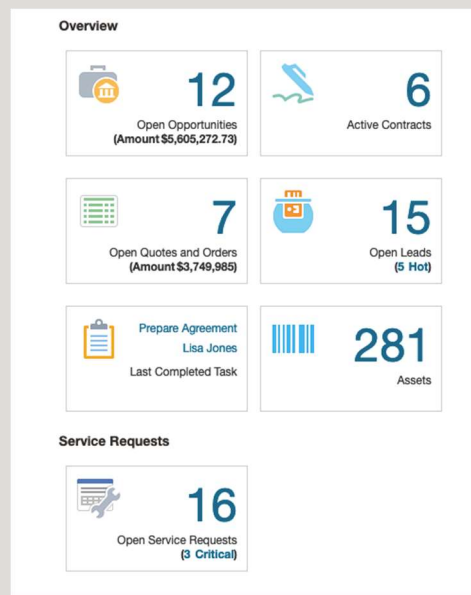
Account View

NOTES	CLASSIC UX	NEXT GEN UX
<p>What needs to be in this summary view?</p> <p>How can you simplify your version of this?</p> <p>What will help sellers move through the necessary sales processes?</p> <p>Can any data be put behind a role-based UI that isn't critical for each person viewing/editing/adding information to this page?</p>		
<p>What are the 6 most critical fields for an overview?</p> <p>What will help sellers move through the necessary processes?</p>		

## What are most important objects to set up as panels on this view?

Recommendations include:

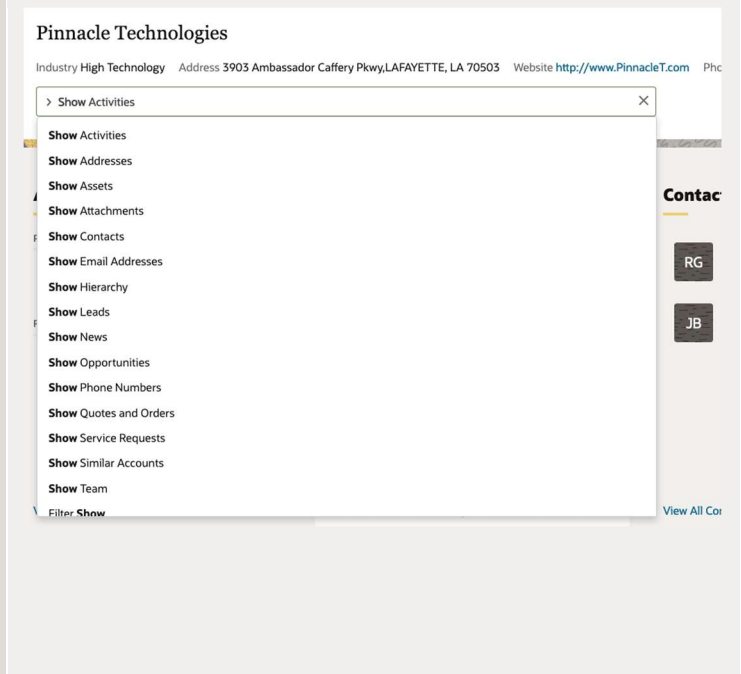
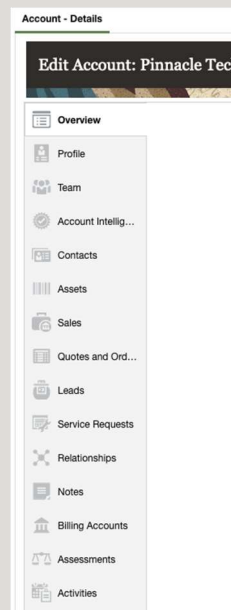
- Activities
- Hierarchy
- Contacts
- Opportunities
- Leads
- Service Requests
- Assets
- DataFox News Signals



## What child and related views will your sellers need to navigate to from here?

Examples include:

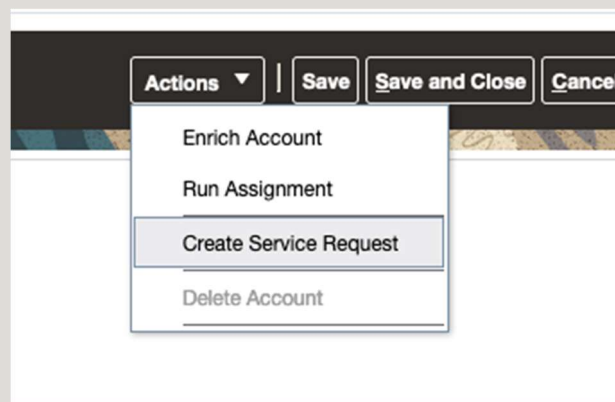
- Show Addresses
- Show Quotes
- Show Team



What actions will sellers most likely want to take from this page?

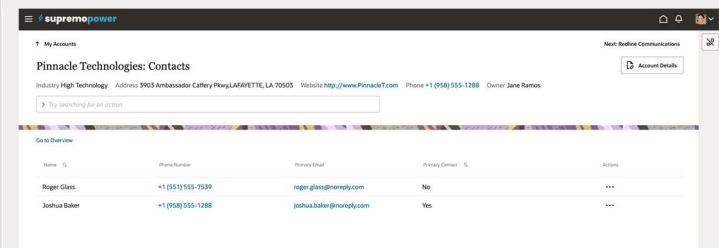
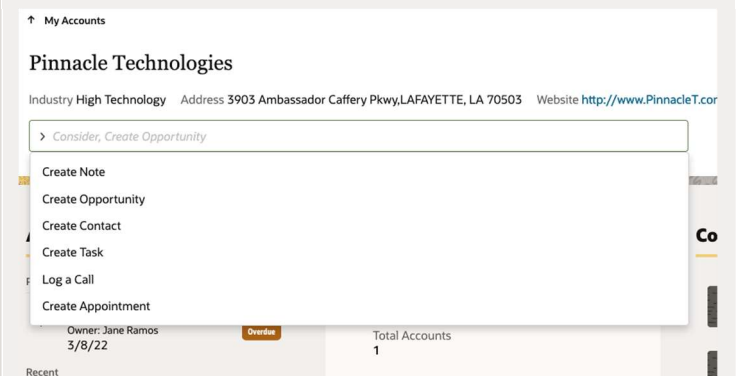
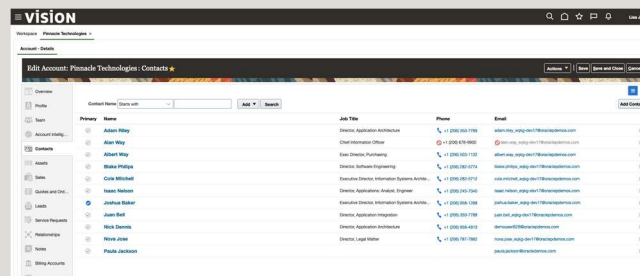
Examples include:

- Create Note
- Create Opportunity
- Log a Call



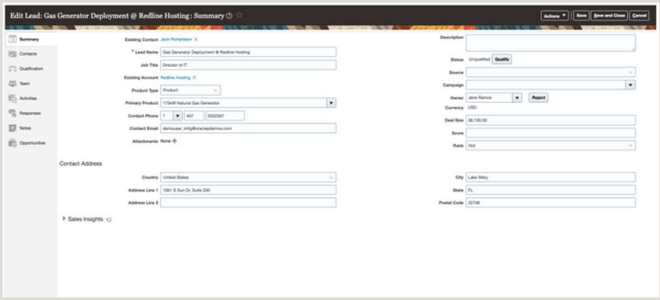
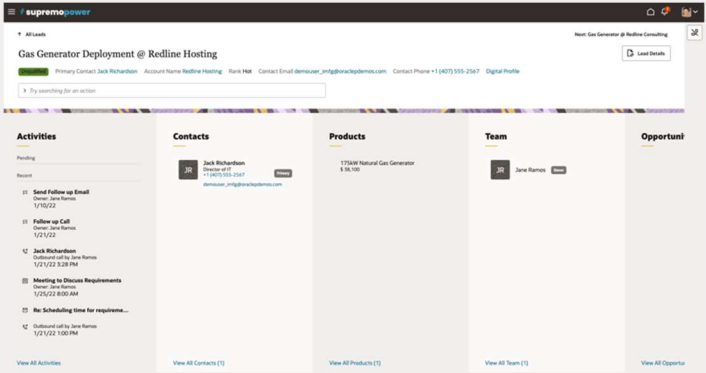
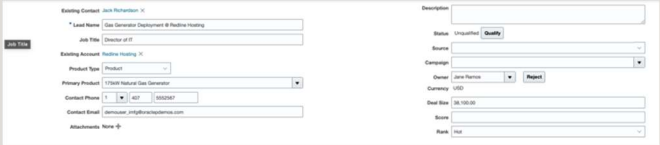

What do you need to see on each of the sub-pages you noted above?

Example: Contacts Sub-page



Add Your Notes Here:

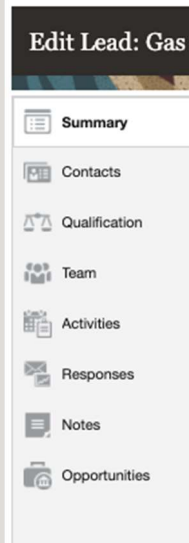
## Lead Views

NOTES	CLASSIC UX	NEXT GEN UX
<p><b>What needs to be in this summary view?</b></p> <p>How can you simplify your version of this?</p> <p>What will help sellers move through the necessary sales processes?</p> <p>Can any data be put behind a role-based UI that isn't critical for each person viewing/editing/adding information to this page?</p>		
<p><b>What are the 5 most critical fields and most critical badge for an overview?</b></p> <p>What will help sellers move through the necessary processes?</p>		

## What are most important objects to set up as panels on this view?

Recommendations include:

- Activities
- Contacts
- Products
- Team
- Opportunity



## Activities

Pending

Recent

- Send Follow up Email**  
Owner: Jane Ramos  
1/10/22
- Follow up Call**  
Owner: Jane Ramos  
1/21/22
- Jack Richardson**  
Outbound call by Jane Ramos  
1/21/22 3:28 PM
- Meeting to Discuss Requirements**  
Owner: Jane Ramos  
1/25/22 8:00 AM
- Re: Scheduling time for requireme...**
- Outbound call by Jane Ramos  
1/21/22 1:00 PM

[View All Activities](#)

## Contacts

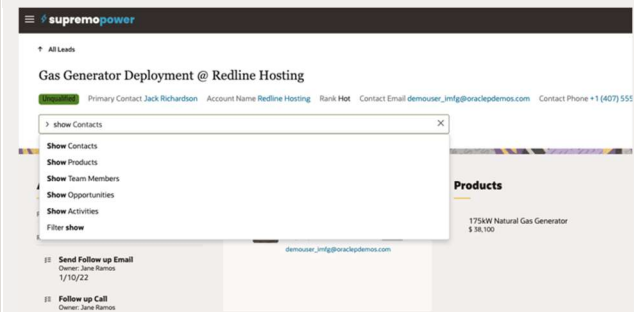
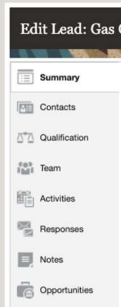
**Jack Richardson**  
Director of IT  
+1 (407) 555-2567  
demouser\_jmfg@oraclepdemos.com

[View All Contacts \(1\)](#)

## What child and related views will your sellers need to navigate to from here?

Examples include:

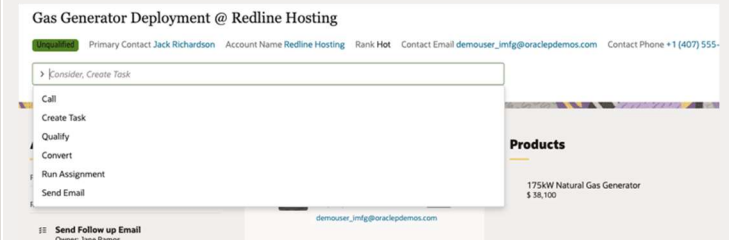
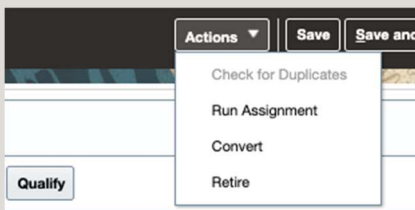
- Show Contacts
- Show Products
- Show Activities



## What actions will sellers most likely want to take from this page?

Examples include:

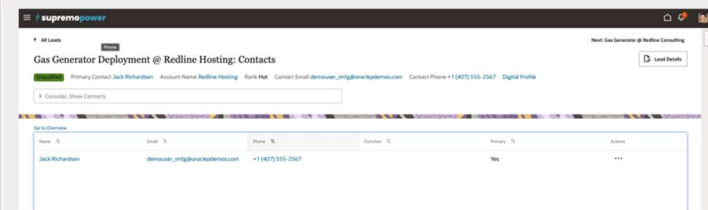
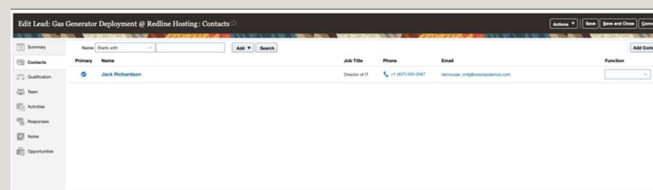
- Create Task
- Call
- Convert





What do you need to see on each of the sub-pages you noted above?

Example: Contacts Sub-page



Add Your Notes Here:

## Opportunity View

### NOTES

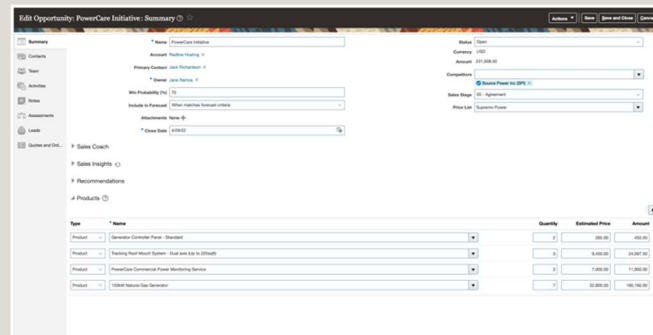
What needs to be in this summary view?

How can you simplify your version of this?

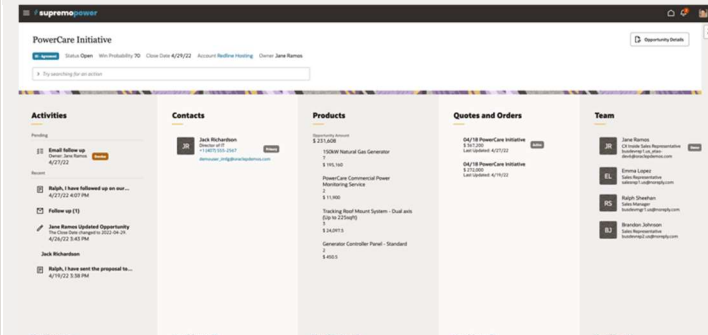
What will help sellers move through the necessary sales processes?

Can any data be put behind a role-based UI that isn't critical for each person viewing/editing/adding information to this page?

### CLASSIC UX



### NEXT GEN UX



## What are the 6 most critical fields for an overview?

What will help sellers move through the necessary processes?

## PowerCare Initiative

65 - Agreement Status Open Win Probability 70 Close Date 4/29/22 Account Redline Hosting Owner Jane Ramos

## What are most important objects to set up as panels on this view?

Recommendations include:

- Activities
- Contacts
- Products
- Quotes and Orders
- Team
- Competitors
- Leads

## What child and related views will your sellers need to navigate to from here?

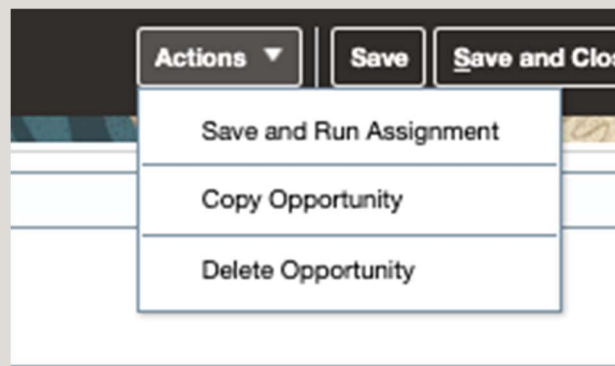
Examples include:

- Show Quotes
- Show Activities
- Show Competitors

What actions will sellers most likely want to take from this page?

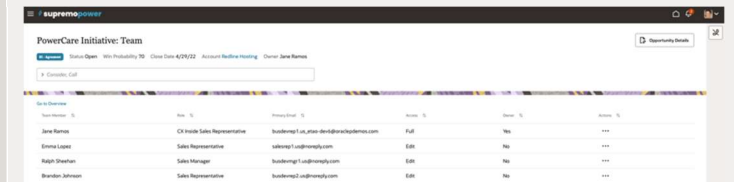
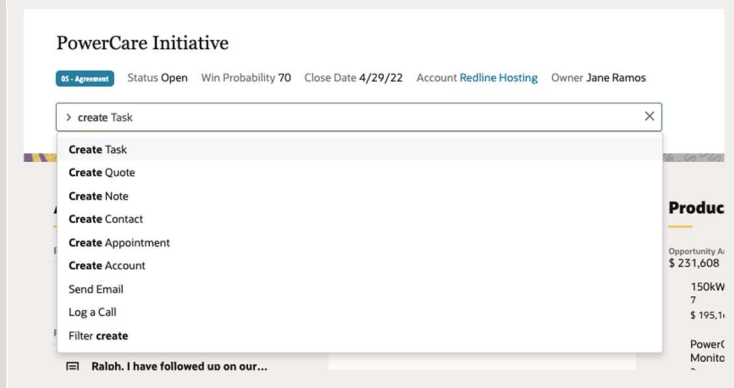
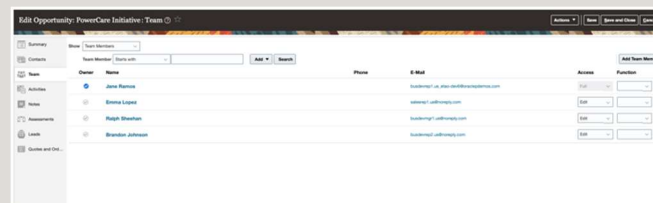
Examples include:

- Send Email
- Create Quote
- Call



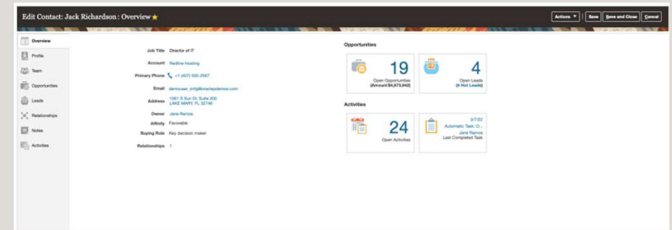
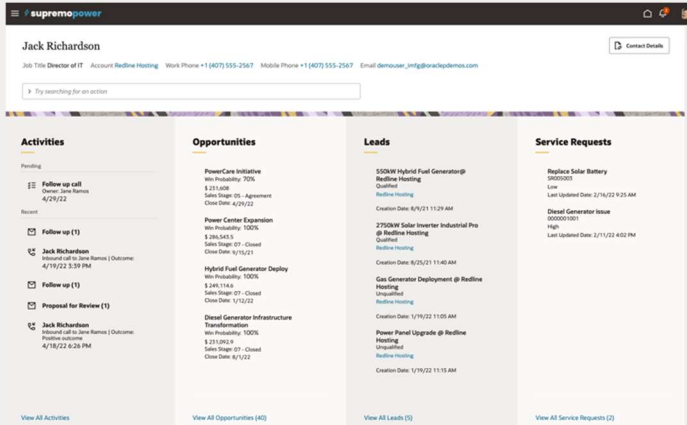
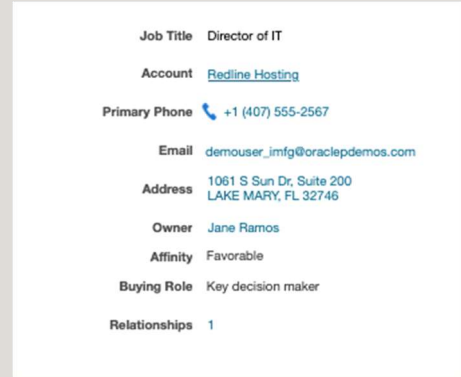
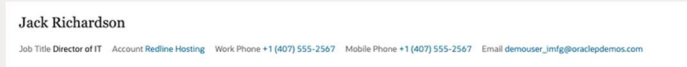
What do you need to see on each of the sub-pages you noted above?

Example: Contacts Sub-page



Add Your Notes Here:

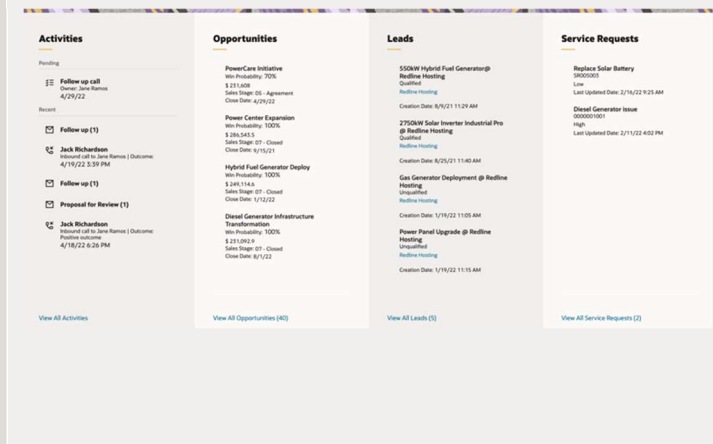
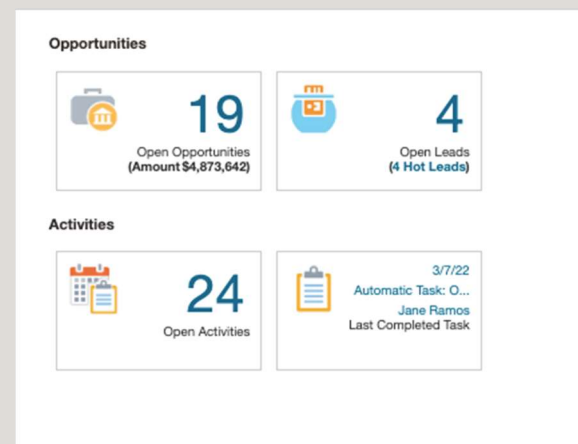
Contact View

NOTES	CLASSIC UX	NEXT GEN UX
<p>What needs to be in this summary view?</p> <p>How can you simplify your version of this?</p> <p>What will help sellers move through the necessary sales processes?</p> <p>Can any data be put behind a role-based UI that isn't critical for each person viewing/editing/adding information to this page?</p>		
<p>What are the 6 most critical fields for an overview?</p> <p>What will help sellers move through the necessary processes?</p>		

## What are most important objects to set up as panels on this view?

Recommendations include:

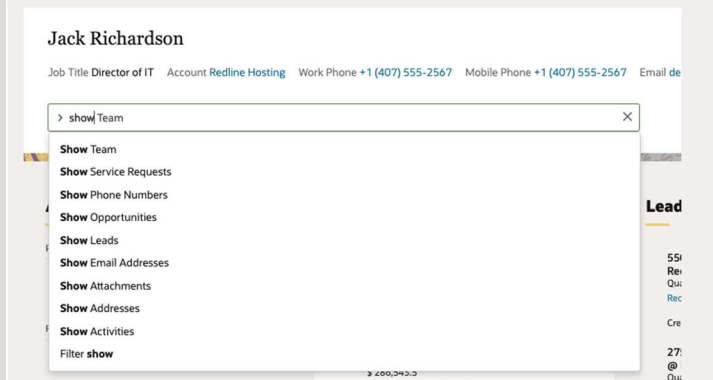
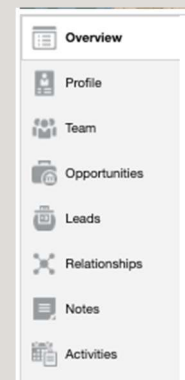
- Activities
- Opportunities
- Leads
- Service Requests



## What child and related views will your sellers need to navigate to from here?

Examples include:

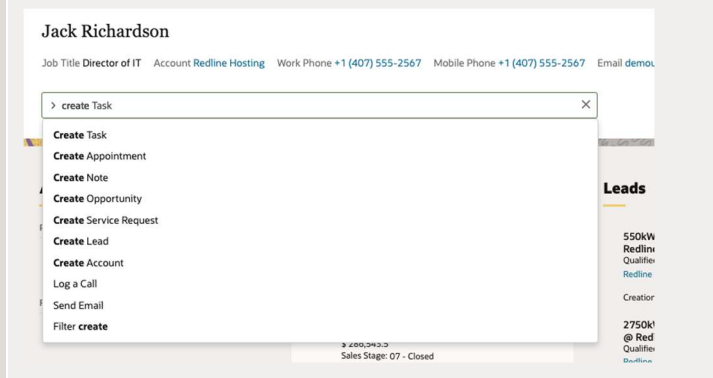
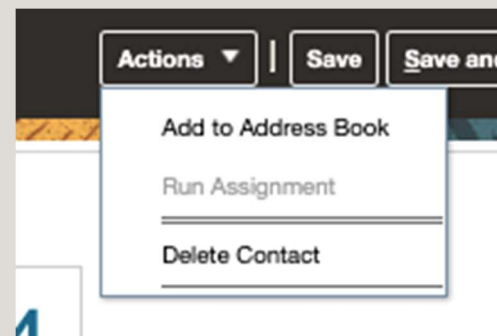
- Show Email Addresses
- Show Leads
- Show Opportunities



## What actions will sellers most likely want to take from this page?

Examples include:

- Create Appointment
- Create Note
- Create Opportunity



What do you need to see on each of the sub-pages you noted above?

Example: Opportunities Sub-page

Edit Contact: Jack Richardson: Opportunities

Overview | Profile | Team | Opportunities | Leads | Relationships | Notes | Activities

Win (%) | Add | Search

Win (%)	Name	Account	Amount	Close Date	Sales Stage	Status
100	Diesel Generator Replacement	Redline Heating	\$229,186	10/1/22	06 - Negotiation	Open
100	Hybrid Fuel Expansion	Redline Heating	\$273,432	3/1/22	06 - Negotiation	Open
100	Power House Upgrade	Redline Heating	\$234,302	10/1/21	06 - Negotiation	Open
100	Upgrade of PowerMax Center	Redline Heating	\$283,721	9/1/21	06 - Negotiation	Open
100	Generator Transformation	Redline Heating	\$305,836	9/1/21	06 - Agreement	Open
100	Hybrid Generator Installation	Redline Heating	\$338,159	4/1/22	06 - Agreement	Open
100	PowerCare Initiative	Redline Heating	\$231,608	4/30/22	06 - Agreement	Open
100	Distributed PowerMax Center	Redline Communications	\$278,748	9/30/21	04 - Presentation	Open
100	Gas Generator Deployment	Redline Heating	\$247,838	12/19/22	04 - Presentation	Open
100	PowerCare Expansion	Redline Heating	\$276,432	12/19/21	04 - Presentation	Open
100	Cloud Center Power Deploy	Redline Heating	\$255,432	10/15/22	03 - Building Vision	Open

Create Opportunity

supremepower

Jack Richardson: Opportunities

Job Title Director of IT | Account Redline Heating | Work Phone +1 (407) 555-2567 | Mobile Phone +1 (407) 555-2567 | Email demouser\_jm@supremepower.com

> Consider: Create Task

Go to Overview

Name	Win Probability	%	Close Date	%	Amount	%	Sales Stage	%
PowerCare Initiative	10		5/1/22		\$ 227,295.85		01 - Qualification	
Power Center Expansion	10		5/1/22		\$ 258,221.1		01 - Qualification	
Hybrid Fuel Generator Deploy	10		4/22/22		\$ 255,611.85		01 - Qualification	
Diesel Generator Infrastructure Trans	20		11/30/21		\$ 261,636.8		02 - Discovery	
Hybrid Generator Enhancement	20		12/15/21		\$ 268,152.5		02 - Discovery	
New Power Station	20		11/30/22		\$ 235,195.3		02 - Discovery	
PowerMax Installation	40		10/15/22		\$ 255,450.5		05 - Building Vision	
Distributed Power Expansion	40		6/15/22		\$ 268,165.5		05 - Building Vision	
PowerMax Expansion	40		1/31/22		\$ 272,765		05 - Building Vision	
PowerCare Upgrade	50		12/19/22		\$ 247,938.2		04 - Presentation	
Power Center Upgrade	50		9/30/21		\$ 278,745.6		04 - Presentation	
Gas Generator Upgrade	50		12/19/21		\$ 276,432.3		04 - Presentation	
Distributed Power Center	70		4/15/22		\$ 338,158.9		05 - Agreement	

Add Your Notes Here:

Seller Dashboard

NOTES

What are your seller roles?

What are the key lists and visualizations that will make each role successful?

CLASSIC UX

My Accounts

123 Main St Condo ... Sara Garcia

123 Main St ALBERTA, CANADA

Imaging Innovations ... Jane Butler

9104 Executive Park DuXONVILLE, TN 37823

Innova Devices ... Brenda Bean

133 Plaza DuHATTIESBURG, MS 39402

JK Steel ... Cornelia Hopkins

165 Three Springs Rd.BOWLING GREEN, KY 42...

Pacific Utility Network ... Isaiah Martin

2235 Center Street.CHATTANOOGA, TN 37421

Pinnacle Technologies ... Joshua Baker

3903 Ambassador Caffery Pkwy.LAFAYETTE, LA ...

My Contacts

Ann Reynolds

Redline Hosting

ann.reynolds@rednopoly.com

+1 (407) 555-3421

Ben Hughes

Redline Hosting

ben.hughes@rednopoly.com

+1 (321) 555-9872

Brenda Bean

Innova Devices

brenda.bean@rednopoly.com

+1 (250) 555-8538

Garrison Clark

Redline Hosting

My Leads

W 1250kW Diesel Generator @ Redline Consul...

H 1250kW Solar Inverter Industrial Advanced...

C 415W Solar Inverter Elite @ JK Steel

H 550kW Hybrid Fuel Generator@ Redline Ho...

W 693kW Solar Inverter - Industrial @ Pacific...

C Data Center Power Upgrade @ Costa Corp...

F Gas Generator @ Redline Pinnacle

My Opportunities

My Open Opportunities

02 - Disc... New Generator Installation

2/24/22

03 - Build... Distributed Power Center

12/31/22

01 - Qual... Diesel Generator Infrastructure Tr...

12/25/22

05 - Agre... Generator Deployment

12/22/22

04 - Pres... Gas Generator Deployment

12/18/22

02 - Dis... Unified PowerMax Deployment

12/19/22

My Tasks

My Open Tasks

Follow up with Jack Butler

Meeting

8/1/21

Follow up with Jack Butler

Call

8/1/21

Call customer to discuss deal

Call

8/1/21

Follow up

Chat

8/19/21

Discuss next steps to work with Redline Hosting

Chat

8/20/21

Discuss Approval Process

Meeting

12/31/21

My Appointments

My Appointments

8/18/21 7:00 - 8/19/21 7:25 AM

Introduction Meeting

8/18/21 7:00 - 8/19/21 7:35 AM

Introduction Meeting

8/20/21 7:00 - 8/20/21 7:05 AM

Followup Meeting to discuss Requirements Detail...

8/20/21 7:00 - 8/20/21 7:30 AM

Meeting to discuss Requirements 1

8/23/21 7:00 - 8/23/21 7:05 AM

Discovery Meeting

8/23/21 7:00 - 8/23/21 7:25 AM

Introduction Meeting

NEXT GEN UX

My Overdue Tasks

53

New Unaccepted Leads

1

My Appointments This Month

40

My Open Leads

13

My Open Opportunities

Distributed Power Center

\$288,087.10

Close Date: 4/25/22

Gas Generator Expansion

\$268,053.40

Close Date: 4/29/22

Generator Transformation

\$265,455.00

Close Date: 4/29/22

New PowerMax Center Initiative

\$208,221.10

My Sales Pipeline

01 - Qualification

02 - Discovery

03 - Building Status

04 - Presentation

05 - Agreement

06 - Negotiation

07 - Closed

Open Tasks

Discuss New Proposal

Generator Transformation

Due Date: 4/29/22

Follow up call

Upgrade Diesel Generators to Hybrid

Due Date: 4/29/22

Discuss Approval Process

Generator Transformation

Due Date: 4/29/22

Setup meeting with executive team

Diesel Generator Requirement

Due Date: 4/28/22

Send Follow up Email Requesting

My Smart List

Redline Hosting

10615 Sun Dr, Suite...

Jack Richardson

Account

123 Main St Condo Project

123 Main St ALBERTA...

Sara Garcia

Account

PowerCare Initiative

\$251,608.00

Close Date: 4/22/22

Opportunity

Director of IT

Jack Richardson

Redline Hosting

+1 (407) 555-2587

Contact

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