

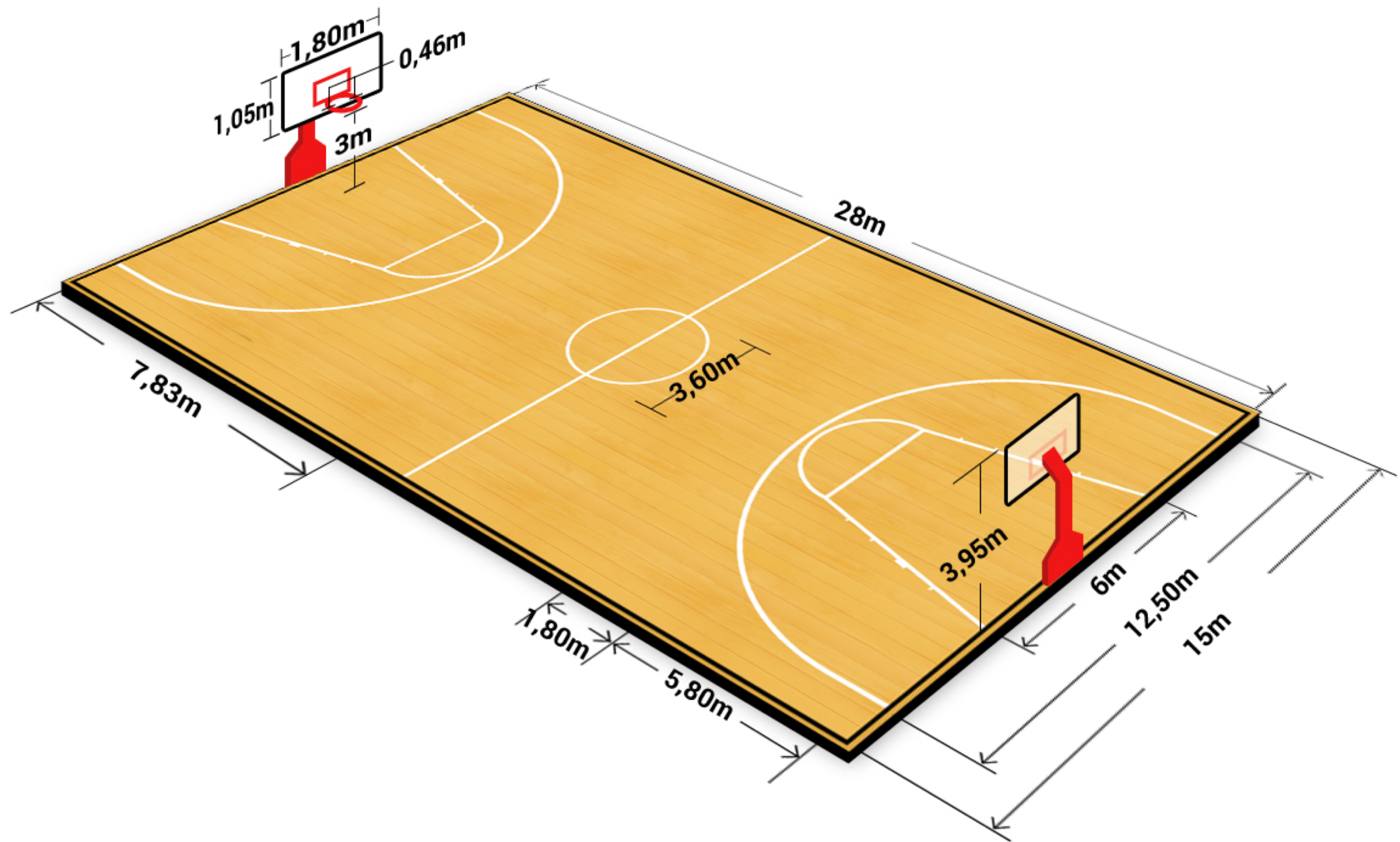
# ABM at Scale: Oracle's Account-Based Strategy with People, Process, Data & Tech

Kelvin Gee | Sr. Director, Modern Marketing Business Transformation, Oracle





Vivek Ranadivé



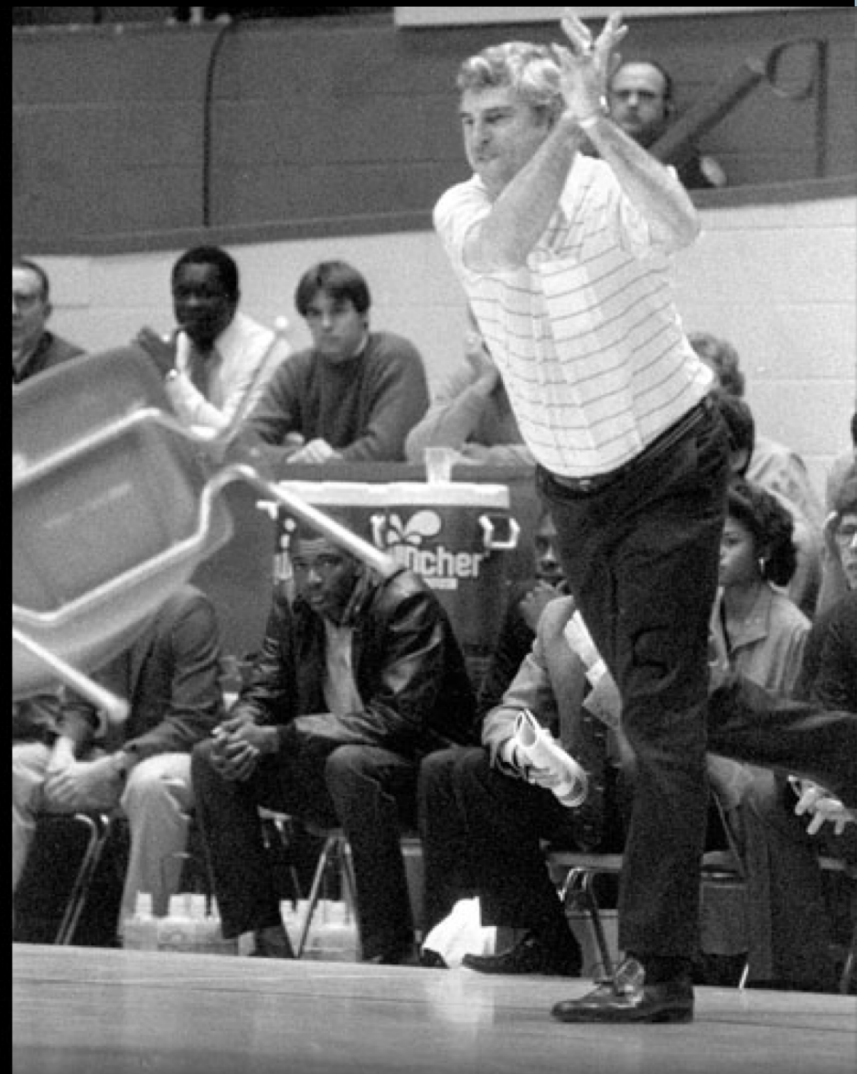




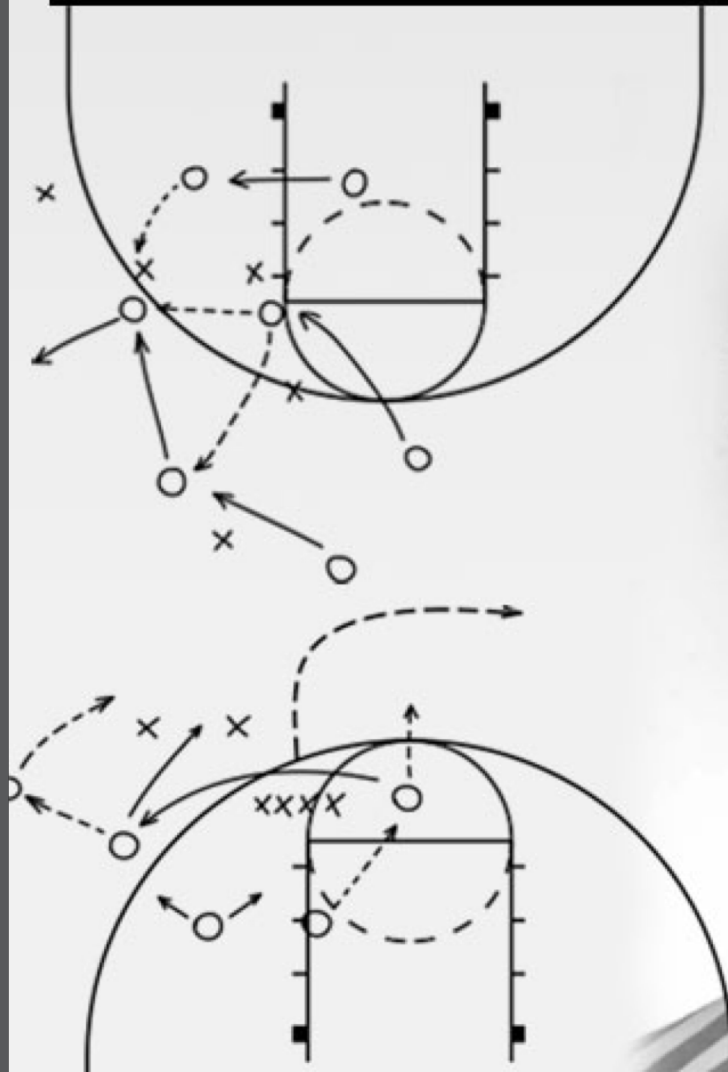








# THE GAME CHANGER





# Account-Based Summit



***"How do we do Account-Based at scale?"***

A green rectangular road sign with rounded corners and a white border, mounted on a wooden post. The word "Challenges" is written in large, white, sans-serif capital letters. The sign is tilted slightly to the right. The background is a bright blue sky with scattered white clouds.

# Challenges



\$40B

Revenue in FY18



4,000+ products



25,000  
partners



430,000  
customers in  
175 countries



140,000  
employees



130+  
acquisitions in 13 years





**~1,500 marketers**

ORACLE®

ORACLE®



74,000+ salespeople

# Sales' Perception of Marketing





# The Demand Waterfall Is Broken...We Can Do Better



**Only 2%**

of MQLs turn into SAO\*



# Silos





# Journey to the Cloud

ORACLE®



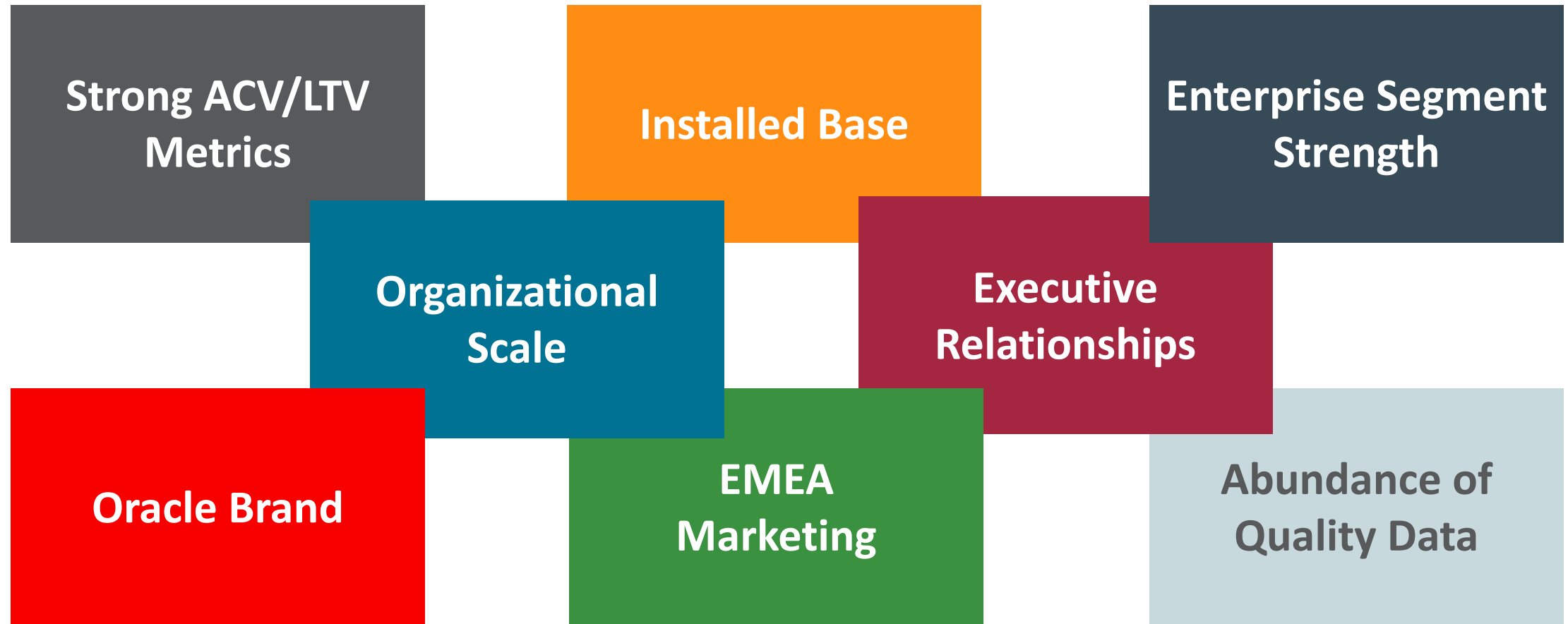
# Shitstorm

Straight Ahead





# Play to Our Strengths: Oracle Is Well-Positioned for Account-Based!



# 3 Success Factors for Account-Based Transformation at Scale



**Modern  
Workforce**



**Modern  
Process**



**Modern  
Technology**



# Modern Workforce

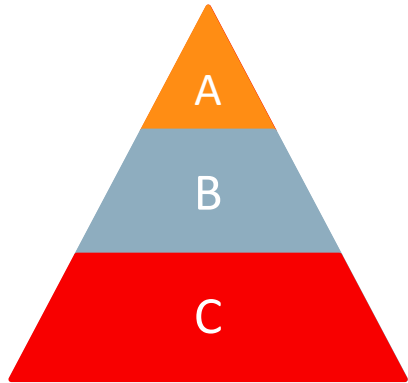


## "Account-Based Marketing" search interest





# Debunking 3 Myths About Account-Based



It's for **All Accounts**  
(Big & Small)



It's a **Strategy**



It's Just  
**"Account-Based"**

# Oracle's Global Account-Based Strategy





# Account-Based Enablement & Training



Workshops



Webcasts



Office Hours



Playbook

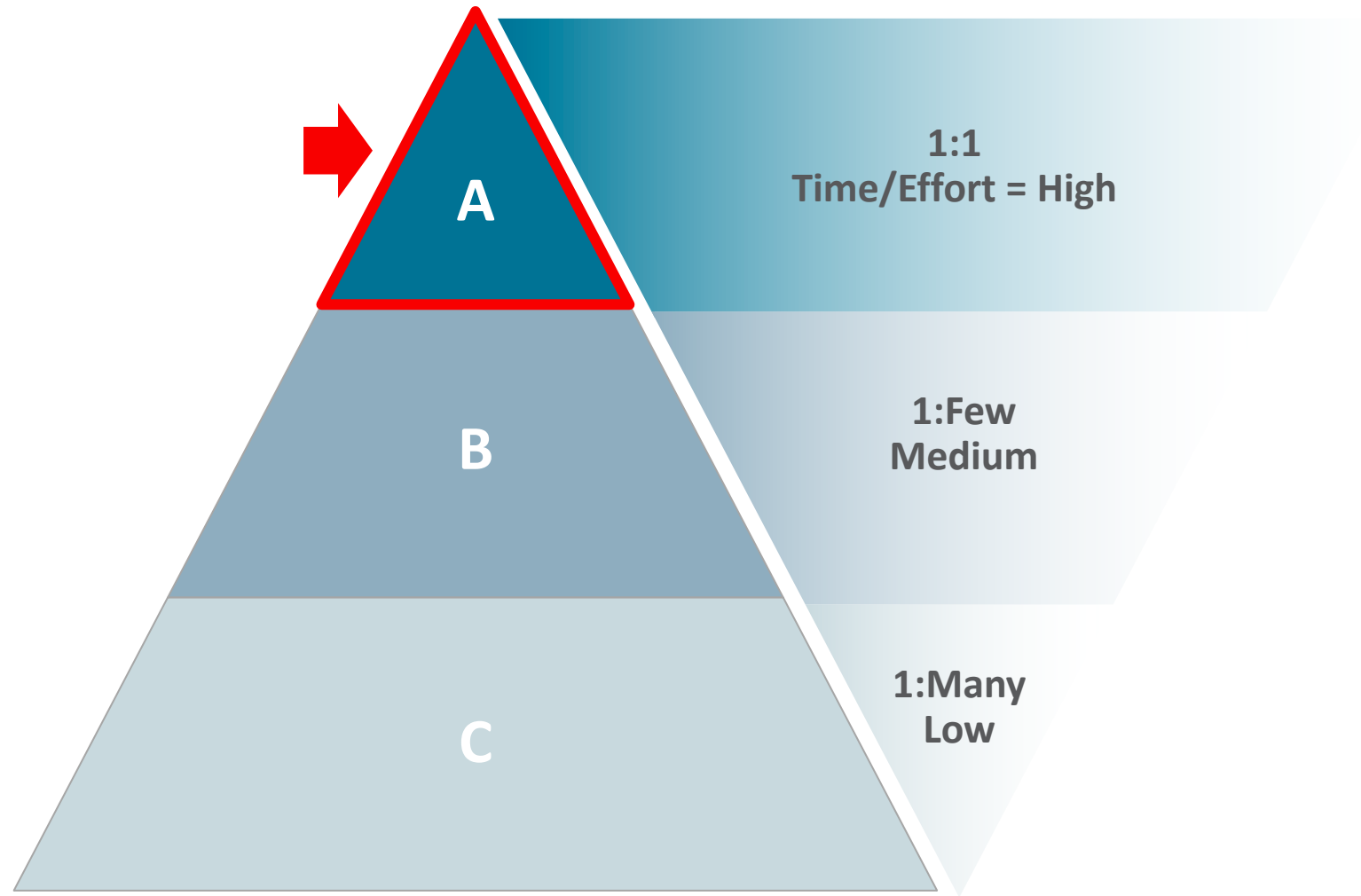




# Modern Process



# Account-Based Personalization Spectrum





# Shayne Elliott

## Position:

Chief Executive Officer  
Melbourne, Australia

## Social Profiles:



You can follow me on Twitter and read my articles on ANZ BlueNotes:

[ANZ BlueNotes](#)

[Source: LinkedIn](#)

## Education:

### University of Auckland

Bachelor's Degree, Management Studies  
1982–1984

[Source: LinkedIn](#)

## Personal Attributes:

*Date of Birth:* 1964

*Nationality:* New Zealander

*Marital Status:* Married

*Interests:* Shayne is a sometimes golfer and runner, frequent home handyman and family cook.  
All Blacks fan

## Key Areas to Guide Messaging

Shayne is very hands-on and, even as CEO, a key target for certain communications. Based on his current Twitter feed, articles in the media, and conference speaking, he is very interested in:

- Empowering employees – driving forward a digital culture
- Customer experience
- Third-party integration (notably with FinTechs to drive ANZ forward in the digital space)
- Organizational change (he believes this is a key driver for digital transformation success)
- Security (recently Tweeted about voice security)

## Brief Profile:

I'm an international banker with more than 25 years of experience in Asia, Europe, the Middle East, the Americas and Australia.

Since 1 January 2016, I have been ANZ's Chief Executive Officer. Prior to that, I was Chief Financial Officer for all aspects of Finance as well as Group Treasury, Investor Relations, and Mergers and Acquisitions.

I joined ANZ in 2009 as CEO Institutional, Transaction Banking, Global Markets, Global Loans and relationship Banking. Prior to ANZ I worked for EFG-Hermes, Citibank/Citigroup across multiple countries.

After 25 years of working in some very different countries, I am now a New Zealander and proud to be part of the ANZ team that we can work with.

*Interests:* Shayne is a sometimes golfer and runner, frequent home handyman and family cook.  
All Blacks fan

Business Council of Australia (from 2016) and Male Champions of Change (from 2016).

## Former Directorships:

- Director: ANZ Securities Limited (2009–2012).

[Source: ANZ website](#)

**CEO, EFG-Hermes**  
March 2005–January 2008 (Cairo, Egypt)

**CEO GTS Asia Pacific, Citigroup**  
2003–2005 (Hong Kong)

**CCO, Citi**  
2001–2003 (Australia)

**CCO, Citi**  
1998–2001 (Egypt)

[Source: LinkedIn](#)

- Security (recently Tweeted about voice security in banking, for example)



# Michelle Jablko

## Position:

Chief Financial Officer  
Melbourne, Australia

## Social Profiles:



## Education:

Monash University

Wesley College, Melbourne

[Source: LinkedIn](#)

## Professional Bodies:

None found

## Personal Attributes:

Date of Birth:

Nationality:

## Key Areas to Guide Messaging

Michelle is the only female CFO of the big four banks. Her background and apparent close ties with Maile Carnegie indicate a digital focus. Interests may include:

- Unifying strategic approach to digital
- Data-driven CX approaches

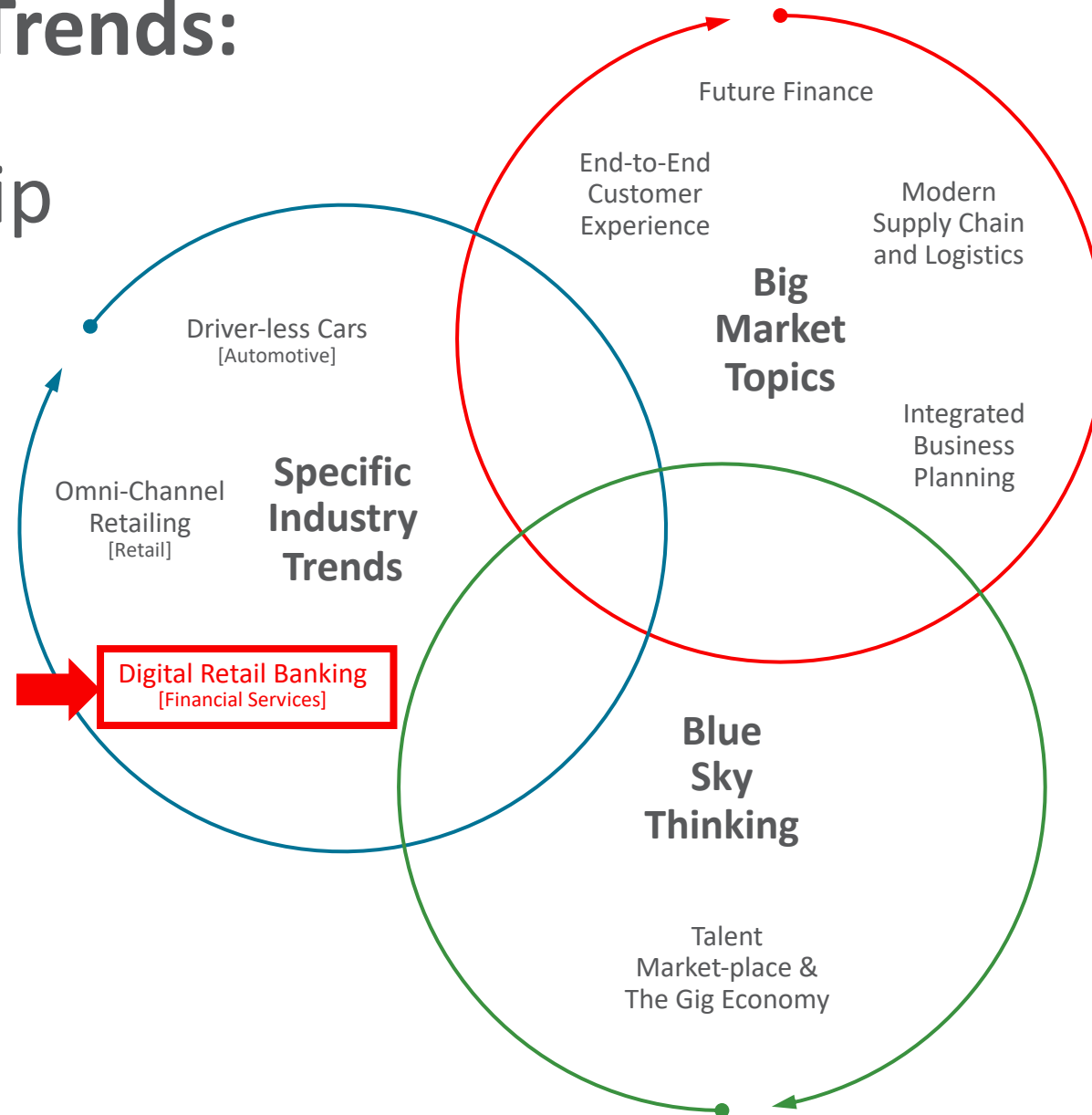
## Brief Profile:

Michelle Jablko joined ANZ as its Chief Financial Officer on 18 July 2016. Prior to joining ANZ, Michelle had a 15-year career in investment banking working across different industries, including financial services, providing advice to Australian companies on strategy, capital management and funding, and investor relations. Most recently Michelle was

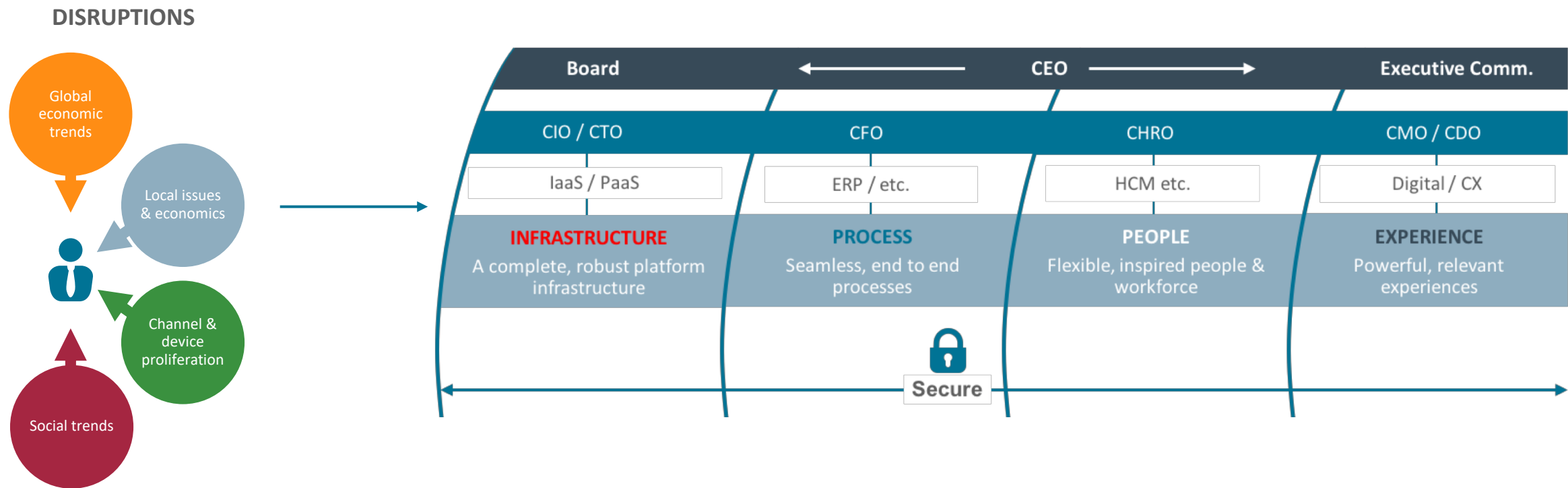
*Interests:* Jablko keeps fit by walking 70 minutes to the office each day, and is a devotee of the unarmed Israeli self-defence system Krav Maga.



# Macro Economic Trends: Opportunities for Thought Leadership



# Ripple Effect: Drive Connected Conversations & Engagement



# Hyper-Personalization



**Oracle Account-Based Strategy – ANZ**

Enabling Oracle with a more powerful, flexible strategic message and messaging structure – to engage ANZ Bank

**ORACLE**

**Our Key Message**

**Bankimagination**

This is a rallying cry to ANZ that underlines that Oracle wants to create something new and powerful together; that we want to make ANZ more able to pursue its vision – to lead with it and make it real. And we want to help ANZ to embrace ideas and keep pushing them to the next level.

**ORACLE**

**Bankimagination:**  
It's time to spark a new way of thinking.

**Hi Mailie.**  
Welcome to your imagination platform.

ANZ stands at the brink of creating a massive change in Australian banking – and has leapfrogged others to become the only of the Big Four to become, structurally and in its leadership, a non-traditional bank with FinTech as its closest cultural companion.

We believe you're trying to ignite change, and we want to help you make that change work by sparking different thinking in every aspect of your business – so you can meet goals with greater fluidity, get closer to your customers than ever before, be more responsive, faster moving – driven by digital data, the cloud across every aspect of what you do.

**Need to speak to someone directly?**  
Call 1300 366 366  
[salesinquiry\\_anz@oracle.com](mailto:salesinquiry_anz@oracle.com)

**Bankimagination. Spark a new way of thinking.**

**ORACLE**



**Messaging Matrix: Incorporating Value Propositions**

Our positioning in terms of value delivered. The word Bankimagination should be used sparingly.

**ORACLE**



**ANZ Positioning Framework – in Development**

Descriptor, value propositions, differentiators, proof-points.

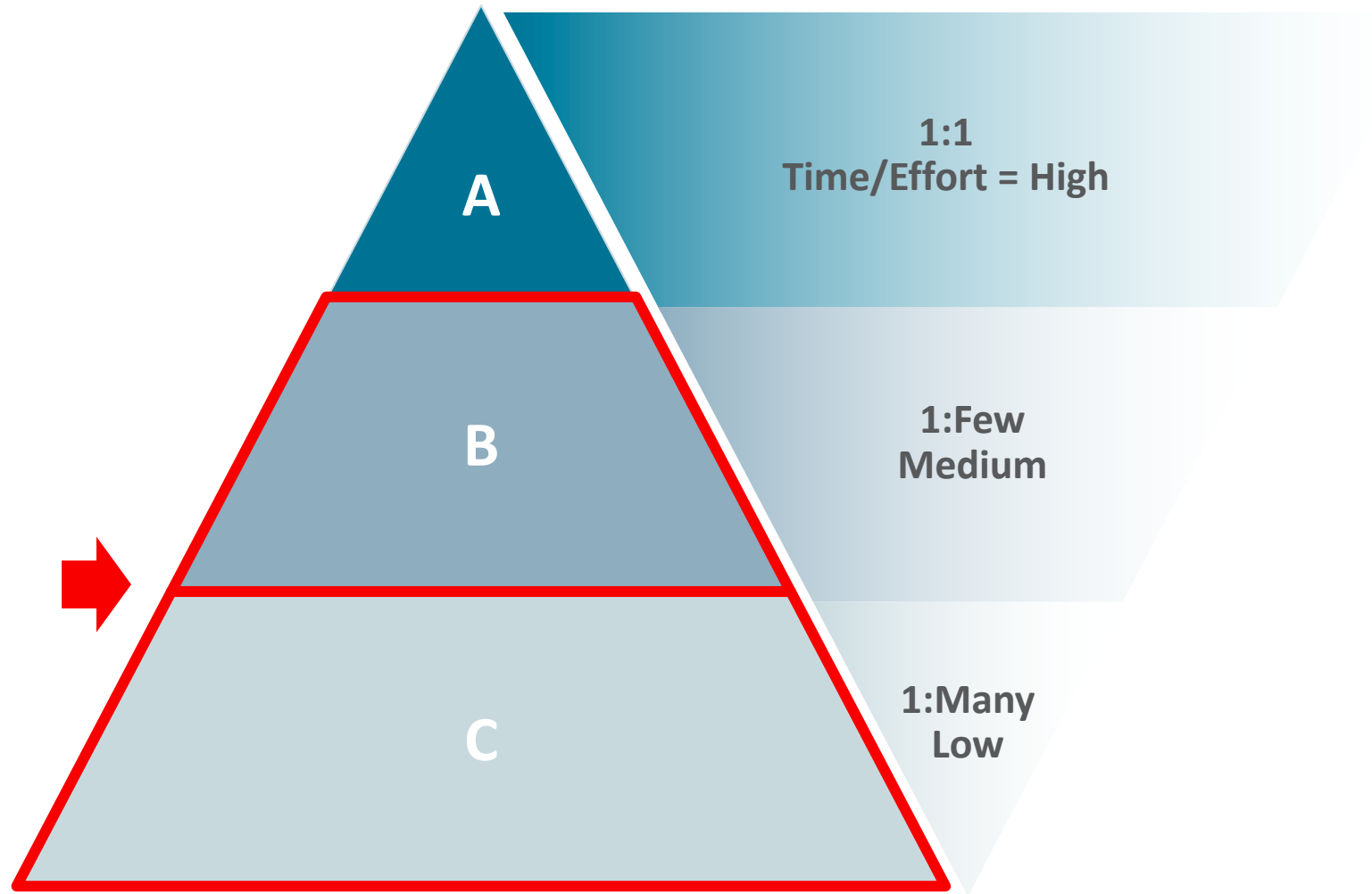
These are the essential building blocks of our positioning framework. Each has a separate role in defining, evaluating, differentiating, and proving what Oracle can offer ANZ – providing the foundations and the detail for further developing the positioning and future content.

**ORACLE**





# Account-Based Personalization Spectrum



# Oracle Persona Central

## Executives

Chief Digital Officer (CDO)  
CEO (SMB)  
CFO  
CHRO  
CIO  
CMO  
COO  
Chief Procurement Officer (CPO)  
Chief Security Officer (CSO)  
CTO  
Customer Experience Officer (CXO)

## Lines of Business

**Administration**  
Provost/VP of Academic Affairs  
VP/Vice Chancellor for Research

**Analytics**  
Head of Business Analytics  
VP/Architect of Data Warehouse  
Business Analyst

**Commerce**  
VP of eCommerce

**Finance**  
Controller  
VP of Financial Planning & Analysis  
Corporate Treasurer

**Human Resources**  
VP of Human Resources  
VP of Talent Acquisition  
VP of Talent Management

## Technologists

Applications IT/Development  
Data Center Manager  
Database Administrator  
Director/Manager of IT  
HRIS Manager  
Enterprise Architect  
VP of IT  
Server Administrator  
Storage Administrator  
IT Security Analyst

**Developers**  
Developer (Back End)  
Developer (Enterprise)  
Developer (Full Stack)  
DevOps Manager/Engineer

## Industry Personas



Comms



Financial Services



Retail



Hospitality



Health Sciences



Utilities



Construction &  
Engineering

MacBook

A collage of various business strategy and technology-related documents, including presentations, reports, and articles. The documents feature titles like "Describing What We Offer", "The Value We Deliver", "The CHRO", "The CIO", "The CFO", "Head of Digital Workplace", "What Sets Us Apart from the Competition", and "Proving What We Do". They discuss topics such as digital transformation, business innovation, and organizational change.

## Messaging Framework by Role/Persona

### Proving What We Do

How we helped other customers achieve as much more with visionary thinking

State Bank of India - Cloud Innovation		Bank Asia Bangladesh - Core Bank	
<b>What was needed</b>	<ul style="list-style-type: none"> <li>Support 500 users of new-age digital services</li> <li>Drive digital skills, improve digital security</li> </ul>	<b>What was needed</b>	<ul style="list-style-type: none"> <li>Coordinate, train, monitor service across 100+ branches</li> <li>Reduce a range of manual processes</li> </ul>
<b>Thinking differently</b>	<ul style="list-style-type: none"> <li>Mobile-first delivery on web, mobile, and ATMs</li> <li>Continuously benchmarking to other players</li> </ul>	<b>Thinking differently</b>	<ul style="list-style-type: none"> <li>Redesigned delivery channels</li> <li>Digitized end-to-end delivery channels</li> <li>Optimized the CRM</li> </ul>
<b>Results achieved</b>	<ul style="list-style-type: none"> <li>Successful provisioning 10,000 employees across years trained</li> <li>Meeting the needs for the bank and its customers</li> </ul>	<b>Results achieved</b>	<ul style="list-style-type: none"> <li>More speed across improved customer service</li> <li>Faster transaction and reduced downtime</li> </ul>

### How Oracle is different

Key takeaways:	STRATEGIC BUSINESS ENABLER	DEEPEST CPG EXPERIENCE	Most complete, and broad platform	The strongest enterprise experience	Most complete cloud
<ul style="list-style-type: none"> <li>Oracle has proven itself as a strategic business enabler</li> <li>Strongest customer experience</li> <li>Strongest brand loyalty</li> <li>Strongest brand equity</li> </ul>	<ul style="list-style-type: none"> <li>Oracle is the most complete, and broad platform</li> <li>Oracle has the deepest CPG experience</li> <li>Oracle has the strongest enterprise experience</li> <li>Oracle has the most complete cloud</li> </ul>	<ul style="list-style-type: none"> <li>Oracle has the deepest CPG experience</li> <li>Oracle has the strongest enterprise experience</li> <li>Oracle has the most complete cloud</li> </ul>	<ul style="list-style-type: none"> <li>Oracle has the strongest enterprise experience</li> <li>Oracle has the most complete cloud</li> </ul>	<ul style="list-style-type: none"> <li>Oracle has the most complete cloud</li> </ul>	

Zelus - Enhanced customer interaction		D&M - Proactive mobile retail alert	
<b>What was needed</b>	<ul style="list-style-type: none"> <li>Improve the customer experience</li> <li>Improve the customer experience</li> <li>Improve the customer experience</li> </ul>	<b>What was needed</b>	<ul style="list-style-type: none"> <li>Improve the customer experience</li> <li>Improve the customer experience</li> <li>Improve the customer experience</li> </ul>
<b>Thinking differently</b>	<ul style="list-style-type: none"> <li>Speak to customers in an personalized and personalized way</li> <li>Customer can interact with the brand on the channel they want</li> <li>Frequency and recency of customer interaction to push personalized messages and content</li> </ul>	<b>Thinking differently</b>	<ul style="list-style-type: none"> <li>Use of AI to drive proactive and personalized service</li> <li>Use of AI to drive proactive and personalized service</li> <li>Use of AI to drive proactive and personalized service</li> </ul>
<b>Results achieved</b>	<ul style="list-style-type: none"> <li>Multi-faceted revenue increase</li> <li>Shortened conversion rate</li> </ul>	<b>Results achieved</b>	<ul style="list-style-type: none"> <li>10% increase in effectiveness</li> <li>Up to 50% cost savings through self-service</li> <li>Long support calls lower 12 mind or more 10% to 15%</li> <li>Enhanced brand loyalty</li> </ul>

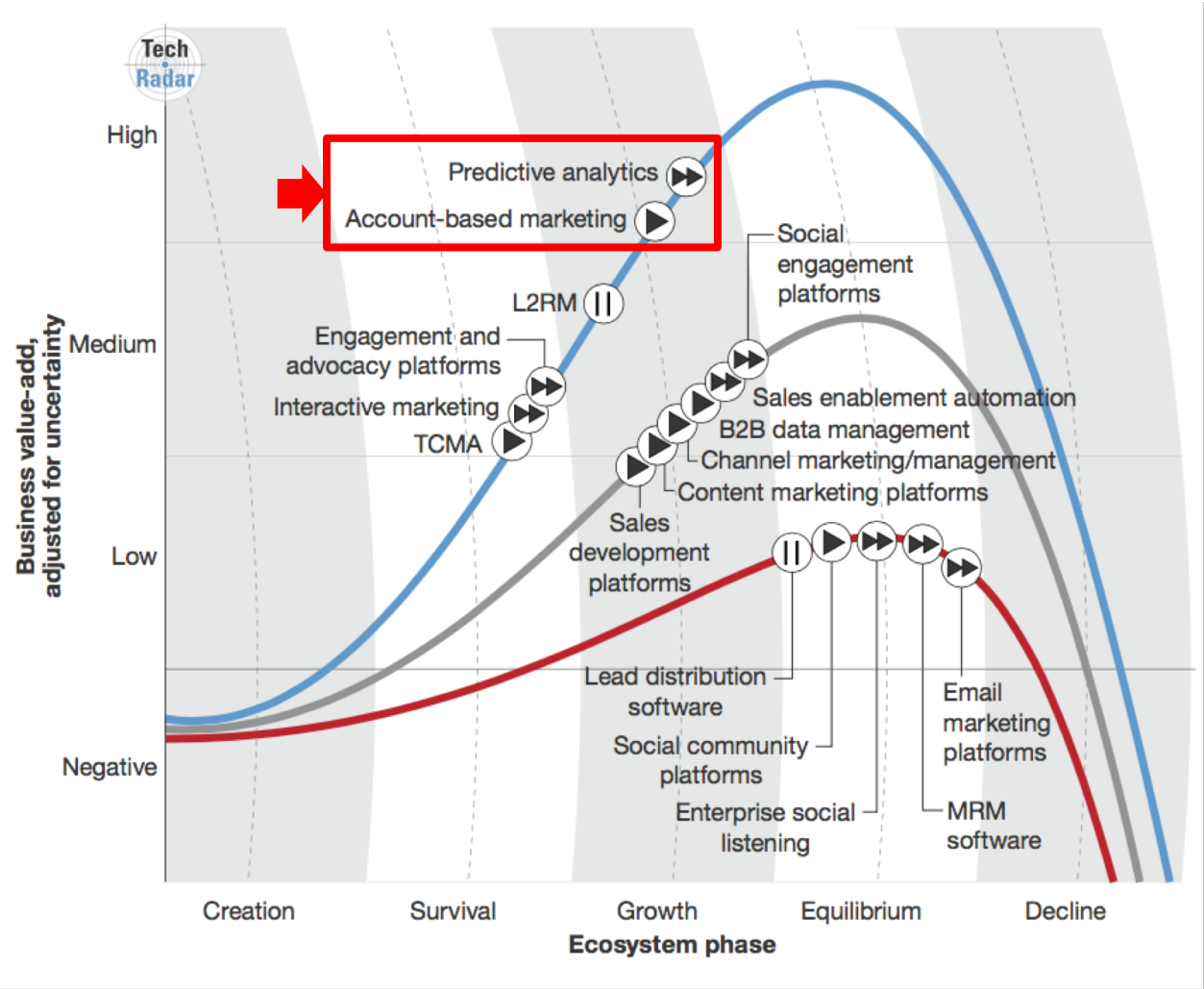
## Sales Battlecards



# Modern Technology



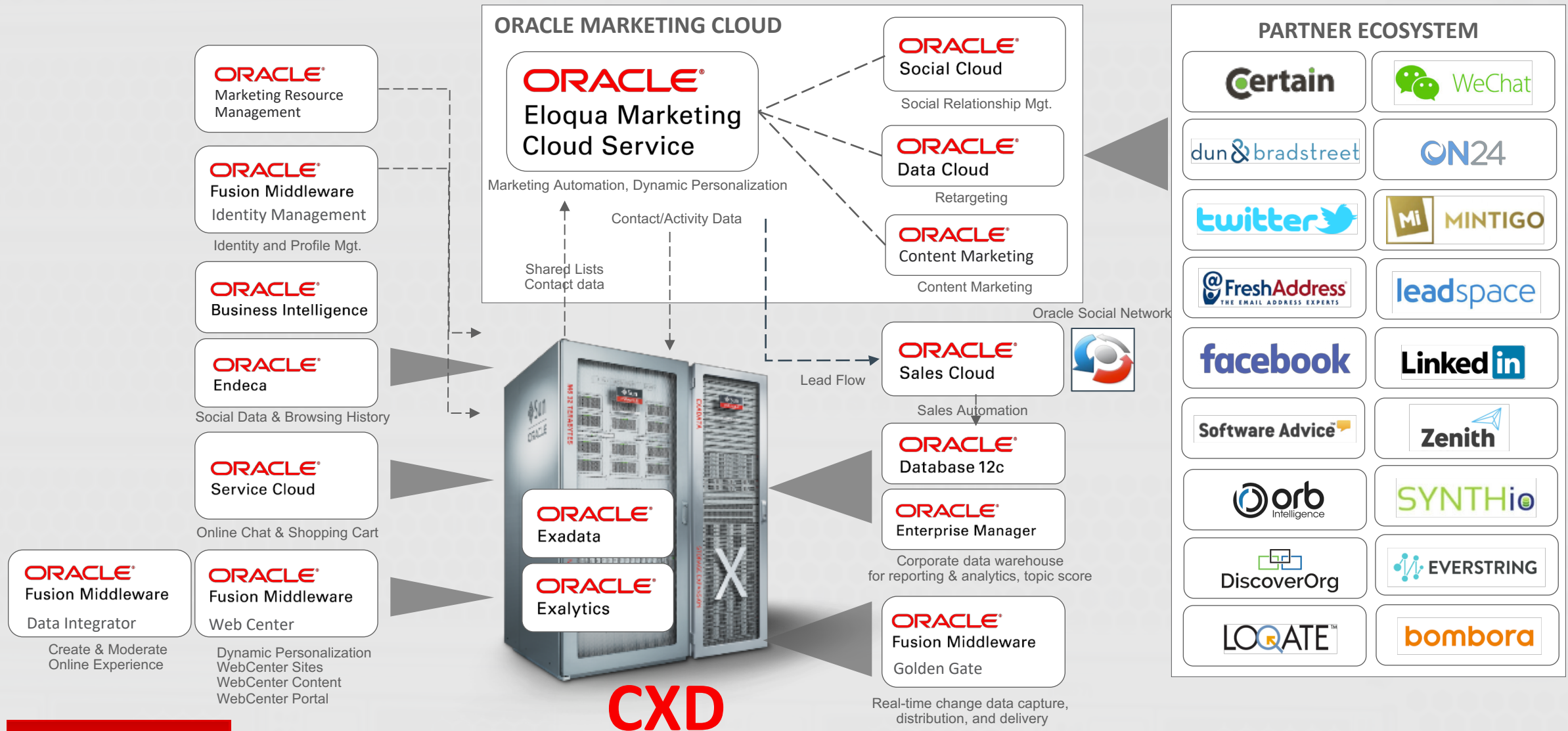
# Predictive Analytics + Account-Based Marketing Are Rising



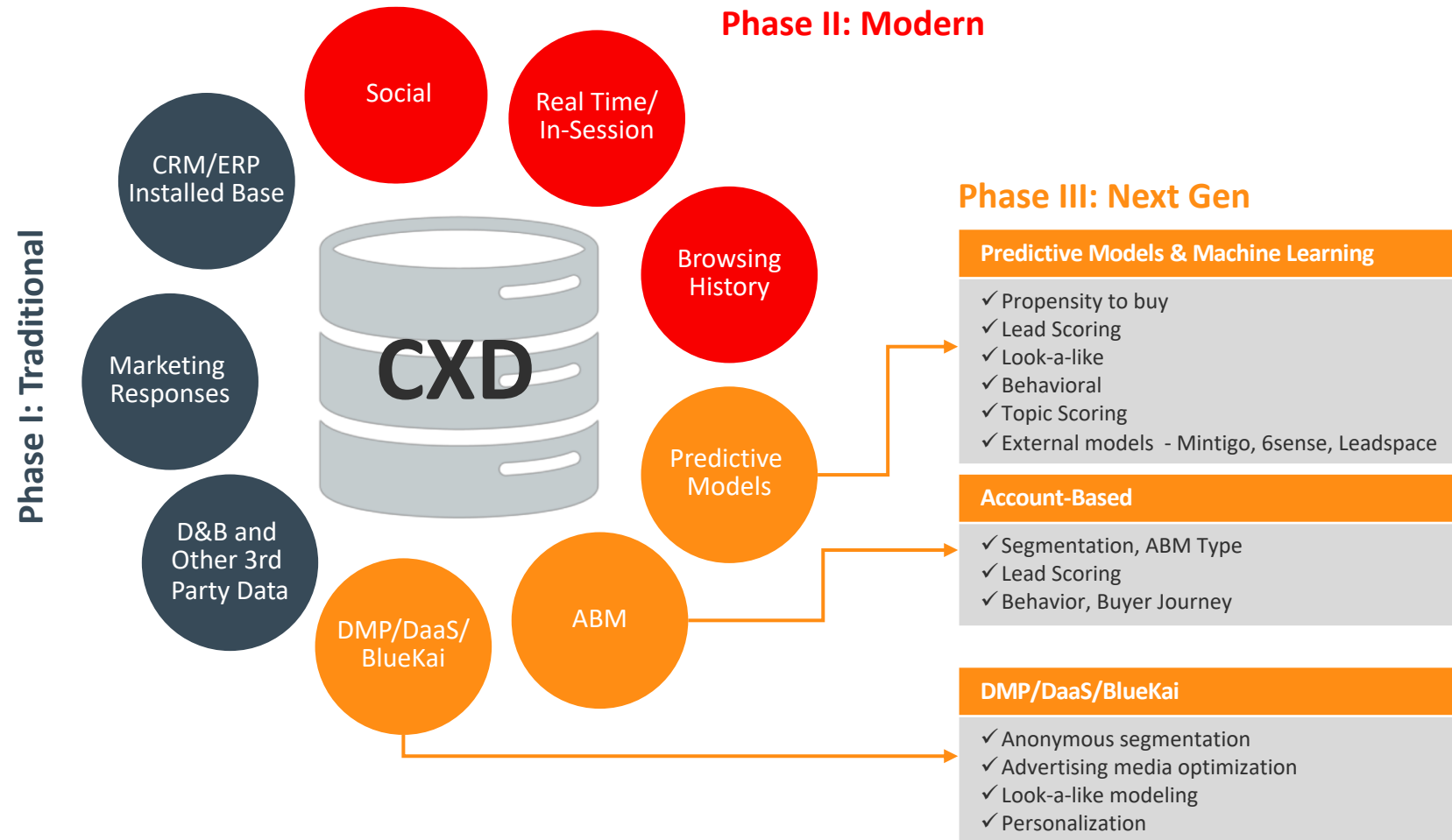
*“Predictive analytics are now delivering real measurable results for early adopters.”*

**FORRESTER®**

# Modern Marketing Technology Architecture

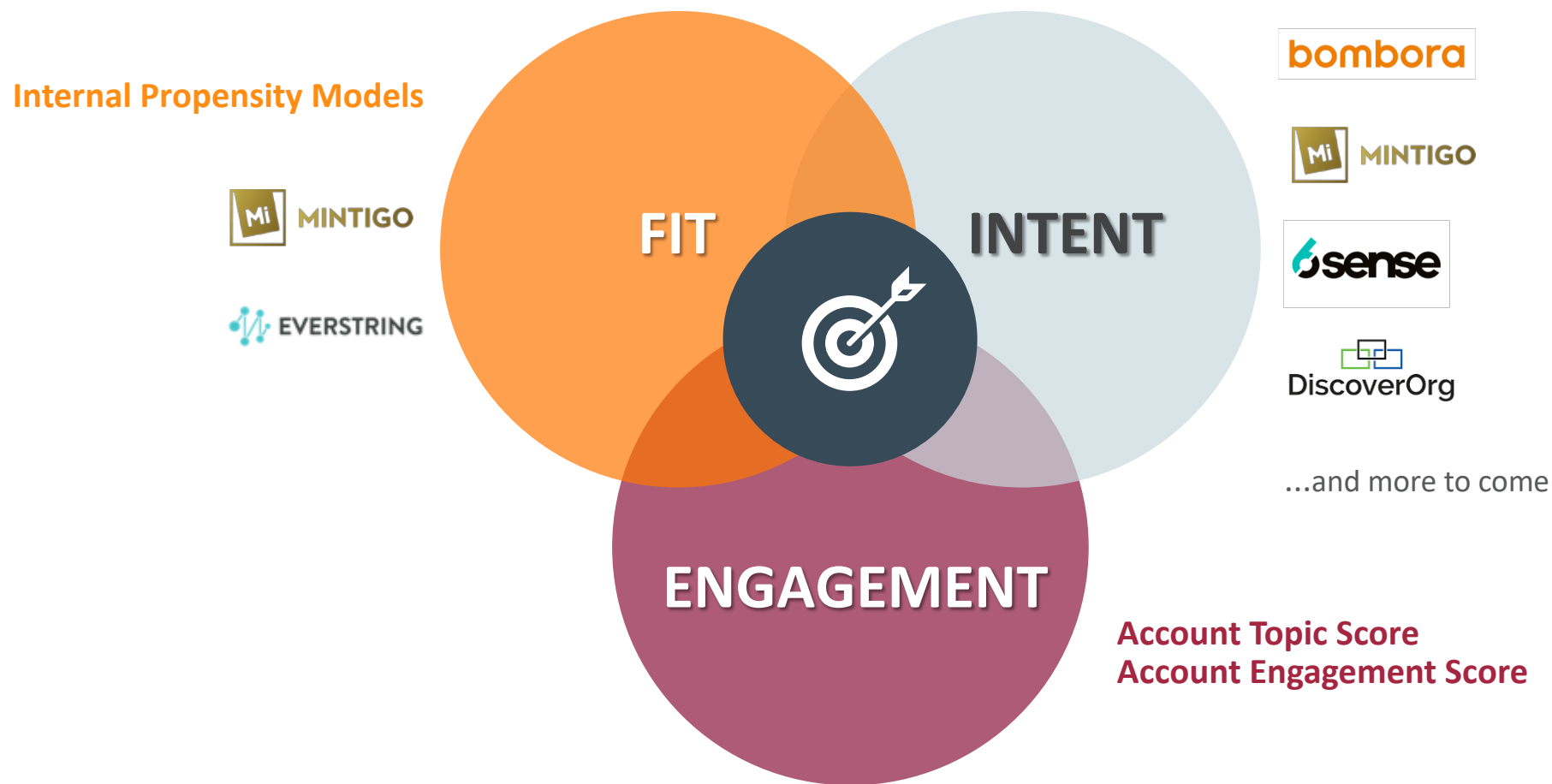


# Customer Experience Database (CXD)



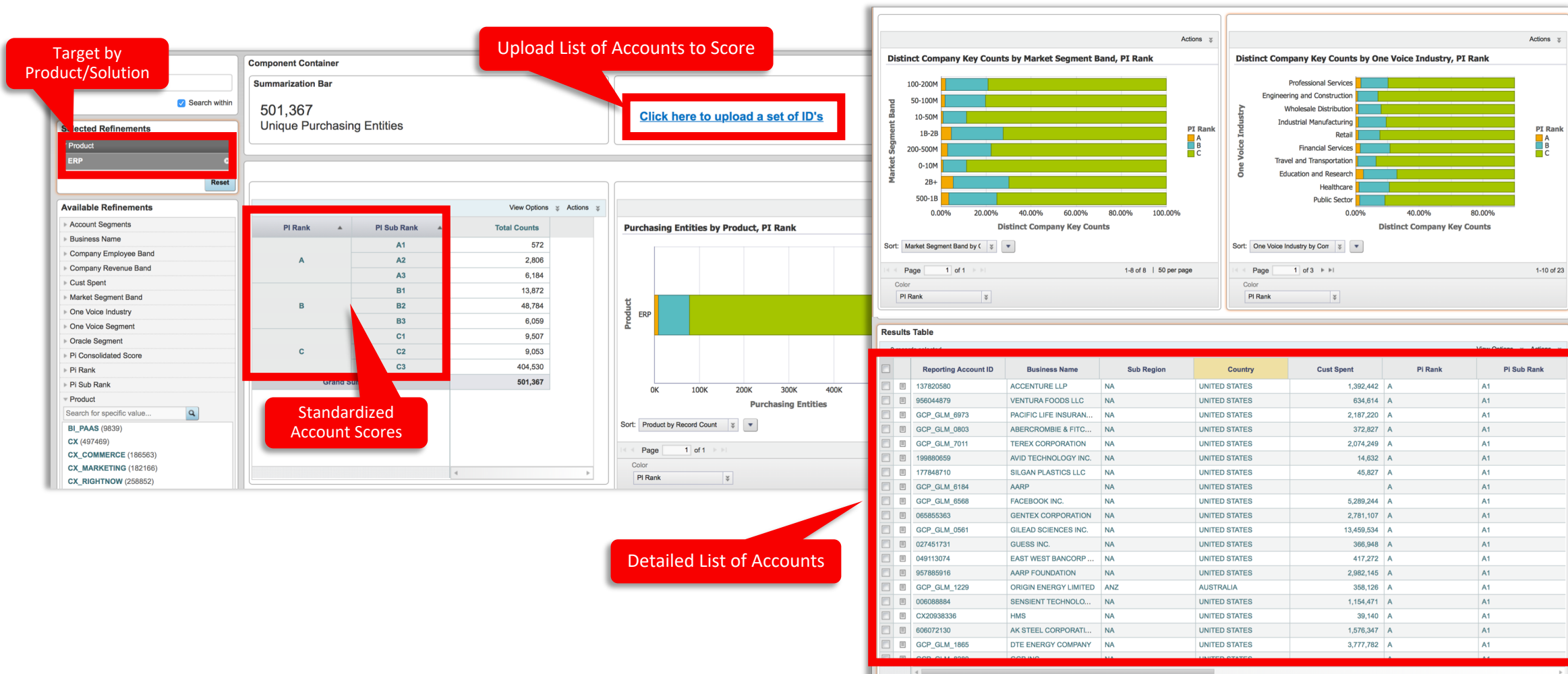


# Oracle's Predictive Intelligence Framework

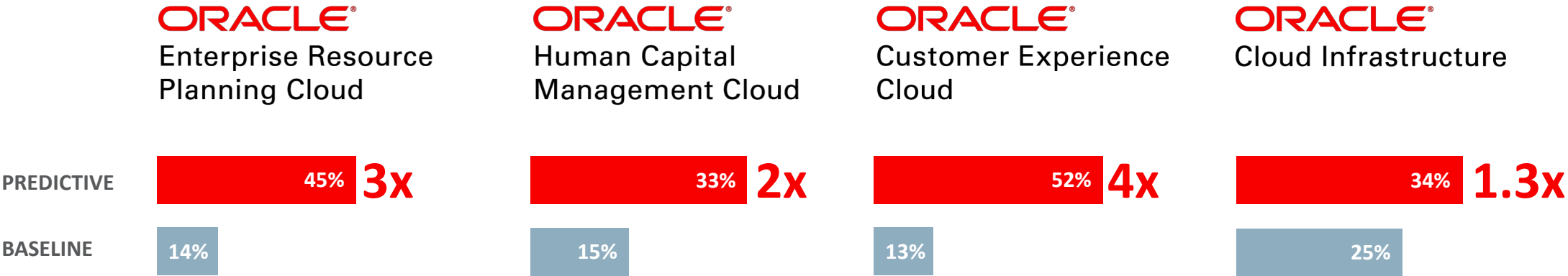


NEW

# Endeca Predictive Intelligence Segmentation: Self-Service Account-Based Targeting at Scale

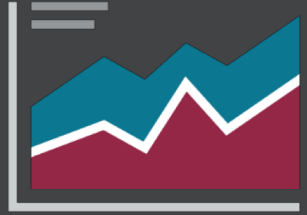


# Predictive Intelligence Delivers **Significantly** Higher Win Rates Across Solutions





# Predictive Intelligence Is Delivering **REAL** Results



**\$635M**  
**Open**



**\$133M**  
**Won**



**Don't Let Perfection Be the Enemy of Good**

**AB** **v.s.** **ABM**



A photograph of a basketball game. In the center, a player in a purple jersey with "LEBANON" on it is jumping high, reaching for a basketball. Several other players in white jerseys with blue and red accents are also jumping, their hands reaching towards the ball. The basketball is orange and has "EVOLUTION" written on it. The background is a blurred gymnasium with blue and white walls. A red banner with white text is overlaid on the left side of the image.

**Sometimes It Takes a  
While for a Team to Gel...**



Good Teams  
Never Give Up

ORACLE®





Our story is still  
being written...

# A Tale of Two Campaigns

Bringing Oracle's ABS to Life







# Thank You!



Kelvin Gee | [kelvin.gee@oracle.com](mailto:kelvin.gee@oracle.com) | @kgee

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