

Example LOB Position Alignment & Mapping Playbook
Oracle and ACQ CO

DATE



LOB Mapping Timeline

Action	Date
LOB Mapping Kickoff / Data Released	DATE
Global LOB Mapping Deadline	DATE

We will communicate additional timeline information specific to the EMEA mapping processes as this can require additional consultation/steps.

Global M&A HR and Line HR Mapping Team**Global M&A HR Team**

Function / LOB	Name	Email
Global M&A HR Lead	Debra Carris	debra.carris@oracle.com
Global M&A HR Lead Assist & US M&A HR Lead	Freda Smith Greene Susan Van Alstyne	freda.smith@oracle.com susan.van.alstyne@oracle.com
EMEA M&A HR Lead	Paul Lewis	paul.lewis@oracle.com
Data Manager / DMT Administrator	Barbie Rucker	barbie.rucker@oracle.com
Consent Requests, EE Data Changes	Nicole Lopes	nicole.lopes@oracle.com
M&A HR Communications	Nicole Rasmussen	nicole.rasmussen@oracle.com
3 rd Party Temp / Contractors	Chris Sinsay	chris.sinsay@oracle.com

Line HR Mapping Leads

Function / LOB	Name	Email
Development	Allison Perkins Susan Phan	allison.perkins@oracle.com susan.phan@oracle.com
Development – PDIT	Stefanie Wittner	stefanie.wittner@oracle.com
Customer Support	Melissa Nichols	melissa.nichols@oracle.com
F&A - Finance, RE&F, HR	Carmen Clemens	carmen.clemens@oracle.com

Data Privacy and Confidentiality

The Employee Data provided to you is confidential and should not be distributed to individuals outside of your LOB Working Group List (WGL) assigned to ACQ CO. Please contact M&A HR for guidance if you have a business need to disclose the data for input to anyone else.

- **Important Note:** Do not email/forward confidential employee data. When sharing the data, you must use a Beehive workspace.
- Please be cognizant of employee data privacy and continue to stress this to your mapping management teams as you work through the process.
- When viewing the employee data in the DMT with others, it is possible to keep the information anonymous by viewing the Grid screen and hiding the employees' names, if required.

Employee Data Changes, including New Hires and Terminations

As we receive data changes for ACQ CO employees, we will update the DMT and notify you via email with the details. Please be sure to share this information with your LOB Leads.

Additionally, please review these changes and determine if appropriate changes need to be made on the Oracle side (example, manager change, salary change, changing a “yes” offer to “no offer” based on employee termination, etc.). These changes will need to be made in the DMT by the LineHR Lead if mapping has not yet been completed. If mapping has been submitted, please work with the Barbie Rucker to capture any needed changes on the Oracle side.

Mapping Process / M&A HR Data Management Tool (DMT)

ACQ CO employee data and Oracle LOB mapping data is housed and maintained in the DMT. Please see below for a brief outline of instructions and user resources.

LOB Mapping Process Steps

Step 1: Review the mapping for your LOB

Step 2: Determine how to disseminate the data to your LOB Leads

Step 3: Begin the LOB mapping process

- Schedule meetings with necessary leaders within your LOB.
- Coordinate your submission deadlines.
- Work with your LOB Leads to address any questions/issues with mapping, etc.
- Coordinate trades of employees between LOB's; trades require both the releasing and receiving LOB approval. **Notify Barbie Rucker and Freda Greene of LOB trades. For EMEA employees, include Paul Lewis.**
- Ensure all appropriate Oracle mapping is completed for the appropriate data fields in the DMT:
 - ✓ Offer Decision (Yes/No)
 - ✓ Position Type (Regular/Transition)
 - ✓ If Transition, Transition End Date

- ✓ Headcount Type (Incremental/Open)
 - Incremental: The additional headcount associated with the acquisition
 - Open: Filling a position that is already approved and open at Oracle
- ✓ Final Job Code
- ✓ Discretionary Title
- ✓ Cost Center
- ✓ Supervisor Data
- ✓ Location Code
- ✓ Salary data (if salary increases, provide justification and name of manager requesting the increase)
- ✓ ATV, if applicable (justification if non-standard)
- ✓ Car Allowance, if applicable
- ✓ Stock, if applicable (justification required)
- ✓ Retention Bonus Data, if applicable (justification required)

Step 4: Review/Audit/Finalize Data in the DMT

Step 5: Ensure appropriate LOB approvals are obtained

Step 6: Alert Barbie Rucker and Freda Greene once LOB Mapping is complete in DMT

EMEA Mapping Considerations

In EMEA, employees transfer to Oracle on their current Terms & Conditions, in their current role, therefore mapping should be on a like for like basis, to the closest Oracle equivalent. Also, as it is difficult to move an employee to a lower status role in EMEA, please err on the side of caution and map to a lower level role, maintaining consistency, if there is doubt on the exact level of the role.

- Regular offers should be planned/mapped for all EMEA employees given the regional transfer process and with **no 'Transitional' offers** or DMT entry of any involuntary termination dates, for EMEA employees.
- Do NOT request resumes, interview or make formal commitments to any EMEA employees, as it is not a selection process.
- Please review and discuss the proposed job mapping for your LOB/function with the regional leaders who will be responsible for communicating the mapping to the employees in EMEA.

Paul Lewis, EMEA M&A HR Lead, will provide overall support in the reviews and ensure completion of the job mapping process with you. Ben Sawyer, EMEA Compensation & Benefits (C&B), will provide guidance on the EMEA guidelines for job mapping.

Following the completion of the global LOB mapping, the data will be reviewed by the country C&B and HR teams for consistency and legal compliance. As a result of this review, additional questions and/or clarification may be asked of the mapping leads.

In parallel, the region will also be undertaking a detailed local benefits due diligence exercise to determine the local country benefit and bonus harmonization strategy and whether this can occur at LEC or sometime thereafter. In addition, M&A HR and the relevant stakeholders are currently working to determine the most appropriate incentive compensation harmonization approach for EMEA.

There may be some changes to compensation from LEC as a result of these activities. Any proposed changes to compensation as a result of these separate harmonization activities will be shared with the LOB Mapping Leads upon completion of the individual analysis. As EMEA's approach is reliant on a number of factors, including integration methodology, LEC timings and employee and/or collective consultation and Corp approval for the EMEA sales harmonization strategy, this information is unlikely to be available prior to the global LOB mapping deadline.

JAPAC Regional Mapping Considerations

Employee mapping should be on a 'like for like' basis. In other words, the role at the target should be more or less the same role being offered at Oracle. If employees are to be offered substantially different roles, this needs to be highlighted to the Regional M&A HR team during the mapping process.

It is difficult in most countries to demote or move an employee to a lower job grade based on their existing role. Similarly, consider any increases to job grade carefully as it is much easier to increase the job grade after LEC than it is to decrease the job grade.

Any LOB initiated changes to compensation structure should be raised with the Regional M&A HR team for Regional C&B review.

Following the completion of the global mapping, the data will be reviewed by the regional M&A, C&B and regional Country HR teams for consistency across the Region and within a specific Country. As a result of this review, additional questions/clarification or changes may be requested/recommended of the mapping leads.

In parallel to the mapping process, the region will also be undertaking a detailed benefits harmonization exercise by Country. There may be some changes to compensation as a result of the harmonization. Any changes to compensation as a result of the harmonization will be communicated to the LineHR/LOB Mapping Leads at the conclusion of the Benefits Harmonization.

LAD & Canada Mapping Considerations

Please reach out to Alberto Brisola (LAD) and/or Sheryl Helsdon-Baker (Canada) for any regional specific guidance.

DMT User Resources

Please utilize the tools and resources specific to using the DMT that are located on the DMT Wiki, including DMT demos/viewlets that cover general navigation, search, running reports, etc.

[DMT Wiki](#)

[M&A HR DMT User Guide](#)

[DMT Oracle Data Field Reference Guide](#)

[DMT Frequently Asked Questions \(FAQ's\)](#)

[DMT Global On Demand Training](#)

Basic DMT Mapping Instructions & DMT Structure (Breakdown by Tab of each Section)

Please refer to the DMT Oracle Data Field Reference Guide for details regarding specific data fields to be completed as part of the Oracle LOB mapping process.

- In the **Grid screens** of the DMT, fields in BLUE are the Acquired Company data fields and the fields in GRAY are the Oracle data fields.
- In the **Details screens**, available Acquired Company data fields are grouped together separately from the Oracle Data fields which are required for the LOB Mapping Process.
- All **Oracle Data fields** are required to be reviewed and if applicable, completed by the LOB / Line HR Lead and/or designee as part of the LOB Mapping process.

Tab	Description	Fields
Status Tab	Data Fields for reference / Required for Oracle mapping	Acq company data fields and Oracle Compensation data fields including: Oracle Region, LOB / Line HR Lead, Oracle Decision, Position Type, Transition End Date, Headcount Type, Job Code, Job Title, and Discretionary Title
Job Code Tab	Data Fields for reference and required for Oracle Job Code mapping	Acq company data fields and Oracle Compensation data fields including: Initial (if provided by Oracle Comp) and Final Job Code, Job Title, Discretionary Title, Function, Specialty Area, Global Career Level, Compensation Type, and Oracle FLSA (US OT Eligible)
Compensation Tab	Data Fields for reference and required for Oracle Compensation mapping	Acq company data fields and Oracle Compensation data fields including: Job Code, Job Title, Employment Category, Oracle FLSA (US Job Code’s OT Eligible), Weekly Working hours, Salary Basis, Currency Code, Hourly Rate, Annual Base Salary, Auto-calculations if change to Salary, Justification data fields required for Salary Increase, Annual ATV Amount, ATV Type, Justification data field for Non-Standard ATV, Oracle Stock, Justification data field required for Oracle Stock, Monthly Car Allowance, On Call Pay Eligibility, Shift Differential Eligibility, and Oracle Retention Bonus data fields including amounts, effective dates, and required Justification
HRMS Req Tab	Data Fields for reference / Required for Oracle HRMS data load	Acq company data fields and Oracle Compensation data fields including: Org Cost Center, Location Code, Oracle Mapped Supervisor ID Type (Acq or Oracle), Supervisor and (as applicable) Host Manager fields

LOB Mapping Reminders

- In general, ACQ CO employees should be mapped into Oracle comparable job families based on their current job roles/responsibilities/function. Where legally appropriate, there are cases where an employee may be mapped into another job family based on the proposed Oracle role identified. For these situations, you should pay particular attention to the compensation component, as these types of changes may include exception compensation handling. It is best to discuss any proposed changes to compensation with the Regional Lead.
- As you work through the mapping, be mindful of internal equity within the current Oracle team.
- Career Level Mapping to M-level Job Codes: US managers mapped to M-level job codes must have 2+ direct reports. In EMEA, managers with 1 direct report should be mapped to an M code, given the regional transfer process.

- Oracle ATV's: Standard practices apply; Non-standard ATV's require GIC and CEO office approval. Discussions around the ATV component should be proactively discussed with Oracle GIC as part of your mapping and LOB submission approval process. Submission to M&A HR is with the understanding that GIC has reviewed the ATV proposal for impacted employees.

LOB Mapping Approvals

Oracle LOB approvals ARE REQUIRED per the M&A Approvals Matrix (available on the Oracle's [HR Professionals](#) website), prior to finalizing your mapping in the DMT. LOB approvals are required **prior** to the Mapping Deadline.

Non-Standard (Exception) Offers: Non-standard offers are those that contain a change in job responsibility/status, salary increase, retention bonus, stock options, etc. Oracle LOB management must be fully supportive of and approve **all** non-standard mapping and offer recommendations. **This includes job code mapping of M6 or higher and Oracle Discretionary Titles with VP or SVP (with the exception of two US Sales roles, discretionary titles must reflect actual job code).** The Oracle CEO Office closely scrutinizes all non-standard mapping and offer recommendations. The following justification requirements must be adhered to:

- A strong business justification must be documented in the DMT for all non-standard/exception offers.
- A LOB contact must be assigned during the mapping process to speak directly with the CEO Office to explain the justification if needed.
- Justifications such as “the manager from ACQ CO felt the increase was necessary and it seemed reasonable” or “the increase is to keep the employee’s OTE whole” are not sufficient.
- Salary increase justifications should address the specifics of the request, such as the value that you anticipate the employee will bring to the role, their experience, skill set, etc.
- Specific criteria must be met in order for an employee to be mapped to a VP title and above.
- VP jobcode assignments should also be approved by VP, HR as part of your LOB approval process. Please see below for more detail on this topic.

Key factors in determining if a role is an M6 level include the following:

- Responsible for multiple functions, departments, and or geographic marketplaces.
- Manages primarily through Senior Directors and Directors – identify by name and level each direct report.
- Span of Control, Reporting Structure (for example, reports to an SVP) and total size of organization.
- Responsible for setting direction and owns resource allocations for a significant organization or business unit.
- Develops and ensures the implementation of strategic business plans and objectives.

Quota could come into play when a decision is on the fence as quota amount(s) may be used to help determine the significance/impact of the role at Oracle.

IMPORTANT NOTE: Please address whether or not the proposed salary is comparable with the salaries of similarly situated Oracle employees within your LOB with the same jobs, career level, and experience. The CEO Office will typically look at how salary increases compare to other, similarly situated employees and where they sit in the salary range.

If your LOB is proposing non-standard (exception) offers (M6 or higher job code and discretionary title, salary increase, retention bonus, stock options, promotions, etc.), a representative from the LOB will need to be prepared to join a review meeting with the CEO Office to provide additional information/explanation/justification for proposed exceptions.

Please refer to the *Acquisition Employment and Compensation Playbook*, which outlines the general guidelines on LOB mapping, hiring, standard compensation processes, non-standard/exception processes and employee offer/notification timing.

Per Oracle Sales/Consulting Compensation T&Cs

All Non-Standard compensation proposals require Global Incentive Compensation and or Local C&B review/approval. If you are proposing Non-Standard compensation elements (i.e. non-standard variables, etc.), then you **MUST** obtain approval from Global Incentive Compensation (GIC) and Regional C&B as part of your LOB approval process prior to the LOB Mapping deadline.

ACQ CO LOB Trade Process

Types of Trades

1. LOB Internal Trades (e.g., WITHIN the Major LOB)

Example: Trade request for employee within F&A LOB should be moved from F&A - Treasury to F&A – Investor Relations

Trades WITHIN an LOB are managed by the LOB Mapping Lead and should follow whatever internal approval processes the LOB has in place. Ideally, both management teams within the LOB would agree to this, and if there are issues, the LOB executive or designee (e.g., LOB Deal Lead) would assist in making a determination.

2. Trades From one LOB to another LOB (e.g., LOB Switch or Trade)

Example: Trade request to move employee from Consulting LOB to Customer Services LOB

These trades may cause conflict as they involve two (or more!) different LOB's. There are two scenarios that may present:

***“The Friendly Sports Trade”:* Agreement from Both LOBs**

- A LOB Mapping Lead requests that an employee be moved from one LOB to another LOB, and both LOBs agree on this movement; trade request could be to move the employee out of one LOB or to move an employee into an LOB.
- Both LOB Mapping Leads receive required approvals from their respective LOBs documenting this agreement.

- The LOB approval could be in the form of an email trail, or a LOB Lead can indicate that the needed approval has been received in an email exchange, verbally, etc.
- The required LOB approvals are determined by the LOB based on their internal processes.
- LOBs may request “concessions” whereby the employee may be assigned certain tasks/projects or agree to time commitments to a LOB as part of this agreement.

“The Vegas Fight”: Two LOBs Cannot Come to Agreement on an Employee Trade Request

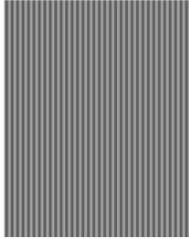
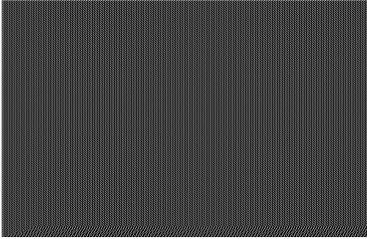
- LOB management must work with each other in an attempt to reach a mutual agreement.
- LOB Mapping Leads should work together collaboratively and strategically facilitate a decision within their respective LOBs.
- It is the LOB management's responsibility to work within their LOBs, up to and including the LOB executive, if needed, to attempt a resolution.
- If no agreement is reached, the LOB Mapping Lead should contact M&A HR to assist in facilitating a resolution, and this “Vegas Fight” can be scored in one of two ways:
 - Technical Knockout (TKO): M&A HR will review and make a determination based on the employee’s job function and organization structural alignment with Oracle’s business model.
 - Decisions go to the Judges (CEO Office): A decision is not clear-cut, or the LOBs want to further pursue their position, or challenge a decision made by the referee (M&A HR).

Special NOTE: M&A HR will provide guidance as needed, however, M&A HR will not become directly involved unless all other options have failed, and the two LOBs have exhausted their attempts to reach a decision.

Trade Process and Updates to DMT

- The LOB Mapping Leads will work together to obtain the necessary approvals from their respective LOBs as detailed above.
- An email detailing the trade should be sent to M&A HR.
- The email can be sent by either LOB Mapping Lead (receiving or releasing); however, both leads (and M&A HR) should be copied on email.
- Subject Line should read: LOB Trade from <current> → <new>: EE (or group) name; example: LOB Trade from F&A → Marketing: John Doe
- It is not necessary to forward actual approvals from the LOB management; however it is fine to include this with the email to M&A HR.
- This email record of the LOB trade assumes that the appropriate LOB approvals have been obtained, as it is the LOB Mapping Lead’s responsibility to obtain these approvals prior to requesting any changes in the DMT.
- The LOB Mapping Lead where the employee currently resides (releasing LOB) will need to make the switch by requesting that the following fields are updated in the DMT:
 - Oracle LOB: change from current LOB to new LOB
 - LOB / Line HR Lead: change from current LOB / Line HR Lead name to new LOB / Line HR Lead name
- DMT will be updated by M&A HR and the LOB Mapping Leads will be notified once the applicable fields have been changed.

The new receiving/gaining LOB is now responsible for all mapping decisions made for that employee.



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Hardware and Software, Engineered to Work Together