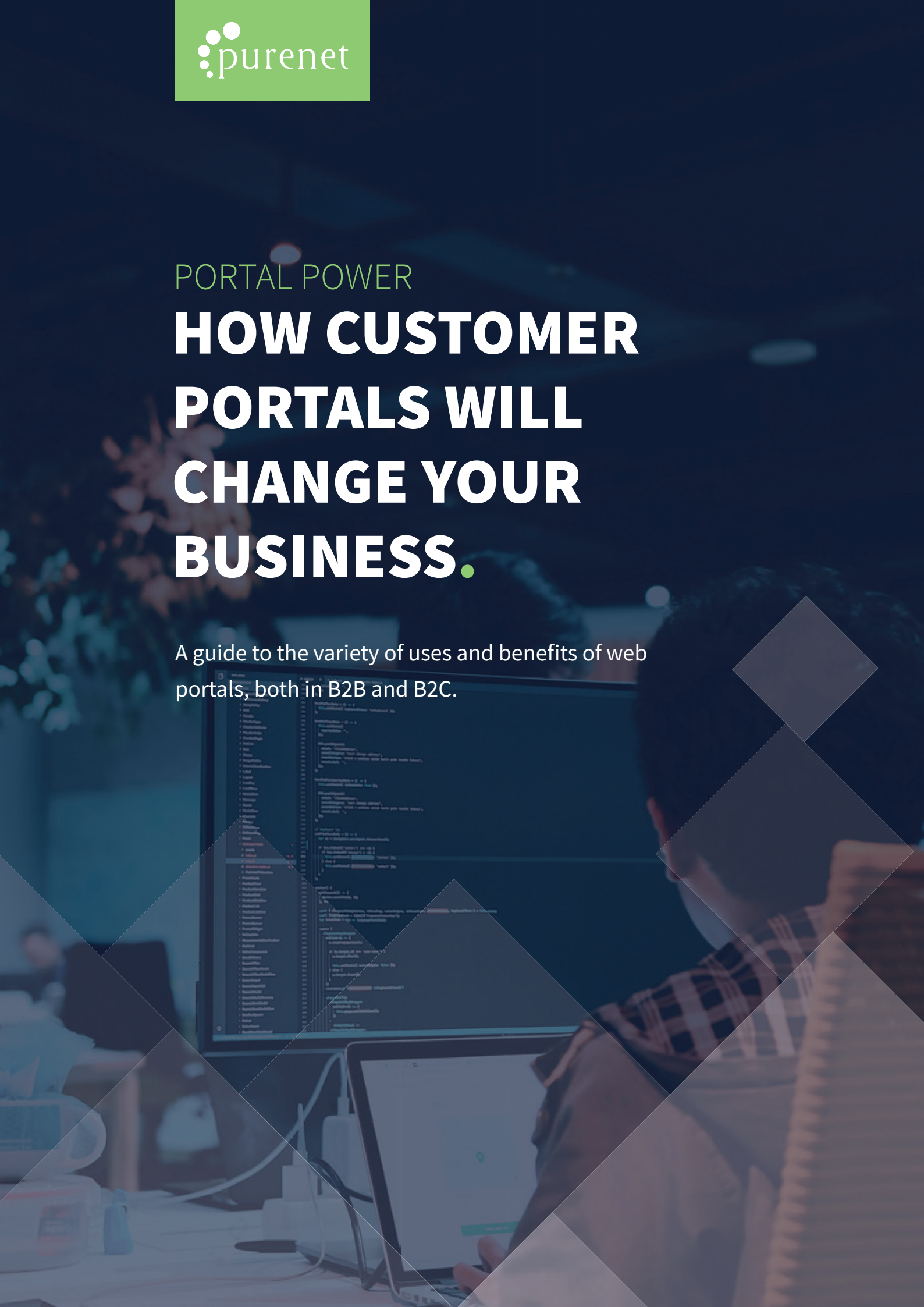


PORTAL POWER

HOW CUSTOMER PORTALS WILL CHANGE YOUR BUSINESS.

A guide to the variety of uses and benefits of web portals, both in B2B and B2C.



Foreword

Web portals have been in use since the 1990s and their purpose has developed over time, to deliver a variety of functions for B2B and B2C businesses, across a wide range of industries.

As digital technologies evolve, they transform the way customers interact with brands and products. Clients, customers and employees expect secure, personalised and fully integrated self-service capabilities. To keep up with people's expectations and to stay ahead of the curve, many B2B and B2C businesses started using a new generation of customer and partner portals.

About the Authors



Dr Paul Gibson






Dr Gibson is PureNet's CEO. He has over 30 years of experience in software development, product development and business management within the manufacturing and retail sectors. He has led one of the UK's leading portal providers for 10 years overseeing its growth. He holds a 1st in Computing Science and a PhD in Artificial Intelligence (AI).



Paul Doherty

Paul Doherty is a PureNet director with 21 years' experience within the technology and web development industry. Paul has worked with major brands such as Sky, Microsoft, EMI, Coors Brewers, Diageo and The Royal Bank of Scotland on leading edge projects throughout his career. He holds a Masters degree from the University of York.

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What is a portal?

A web portal can mean many things to many people. The fact is, whatever people think of a portal, as a tool for improving business collaboration, improving communication and visibility, or connecting and accessing different systems, however it is defined, can deliver significant benefits to businesses. A portal means a doorway or entrance and that very much is what it is. A way of accessing a web system that will allow you, as a user, to perform a task. Web portals provide a single point of access to a variety of content and core services, and ideally offer a single sign-on point.¹

Where portals have particular value is very often about making time consuming, difficult or disparate functions quick and easy. Frequently, there is reporting or logging to make sure there is visibility. Often, too, the portal is connected to one or more systems to allow exchange of data through integrations so that the actions undertaken on the portal will update third party applications.

Portals have progressed rapidly over the years, evolving from on premise 'extranets' to typically cloud hosted platforms operating from highly secure data centres. Whilst portal development takes many learnings and best practice from standard websites there are also significant differences with an emphasis on collaboration and/or the aggregation and access of data. Equally, unlike most websites, usage is limited to those invited to use the system and often there is differing levels of access such as what users can see or do or depending on their user type, role or business.

¹ Indiana University, What is a web portal? <https://kb.iu.edu/d/ajbd>

Evolution of Portals

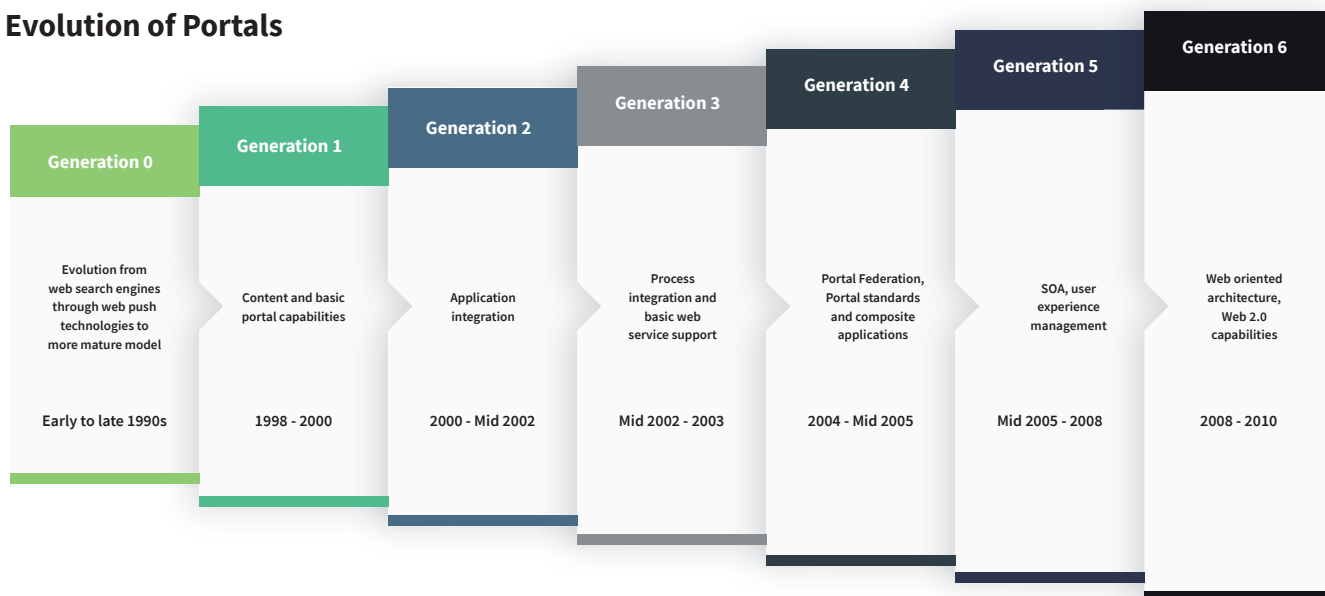



Figure 1, Evolution of Portals

Zhou, J. (2003) 'A History of Web Portals and Their Development in Libraries,' *Information Technology and Libraries*, Vol. 22, No. 3

CIGNEX Datamatics (2012) *Integrated Business Ecosystem*, <https://www.slideshare.net/cignexglobal/webinar-presentation-integrated-business-ecosystem-using-liferay>

Portals have been evolving into integrated software sites containing portal functionality and merged with technologies such as content management and business intelligence.² Portals will continue to develop and accommodate the needs of future businesses and their clients, making data both securely stored and easily accessible for authorised audiences.

² Tatnall, A. (2005) *Web Portals: The New Gateways to Internet Information and Services*, Idea Group Publishing, London.



Different portals for different uses

Whilst there is a range of differing portal technologies and types this white paper will focus on two primary types of web portal: customer portals and ordering portals. These portal types will be illustrated with examples from PureNet's own clients.

Customer Portals

Forrester³ conducted a survey of 319 professionals in North America and Europe to evaluate portal use cases, goals and benefits. Most of the companies included in Forrester's study received their revenue from existing customers and building strong customer relationships was critical. Main business goals to be met were increase in revenue and customer retention and loyalty. Digital customer experiences should be tailored towards these and customer portals are a great way of fulfilling clients' objectives.

Customer portals are interactive solutions deployed by businesses to engage with their customers. This might be to provide information, take a customer on a particular user journey with an end goal or result or to allow the customer to interact with their team in a structured and well-documented fashion.

PureNet has developed customer portals for a variety of clients. Haven Power and Auxillis stand out as prime examples of how a portal can be used to deliver a significant increase in KPI delivery, both in B2B and B2C environments.

³Forrester (February 2016) *Digital Experience Portals: A Modern Approach to Secure, Multichannel Customer Experiences*, Cambridge, MA: Forrester Research, Inc.

Case Study 1: Haven Power

Haven Power, part of Drax Group plc, one of the UK's largest generation groups, required a bespoke portal in order to offer a more rounded online package to its customers.

PureNet's solution delivered a secure portal for Haven Power's B2B customer base which provides convenient 24/7 access to customers and their consultants. The service is an online platform with interactive capabilities where both SME and I&C customers can login and manage their accounts with Haven.



Features of the bespoke portal include

- ✓ Personal information to the customer on the energy markets
- ✓ Information on the businesses' own bills
- ✓ Alerts to the user base and pre warns customers of projected spikes in energy prices
- ✓ Industry news and commentary, keeping customers up-to-date on the latest developments in the electricity industry
- ✓ Access to information and data posted by third party companies including Cornwall Energy

As a result of the portal roll out there was a significant increase in enquiries (35%) and users (133%) with customers saving significant amounts of time using the system (21% less time spent).

Case study 2: Auxillis

Specialists in accident management support and services, Auxillis Services Limited is a part of the £427.3m turnover AIM listed Redde plc. Auxillis handles client claims and provides hire vehicles to not-at-fault motorists on behalf of insurers, brokers, car dealerships and vehicle repairers following an accident. Before a rental vehicle can be arranged a Rental Agreement is produced and signed by Auxillis's customers.

PureNet was appointed to develop the solution with several key criteria



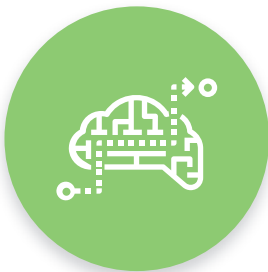
Firstly, the portal had to be legally watertight. The results of the solution had to be able to stand up in a court of law and traceability and clarity were paramount. PureNet provided extensive user logging and tracking interfaces allowing a transparent and demonstrable record of user-activity from login to conclusion. The solution integrated with the Proclaim legal case management system to document activity on the portal.

Additionally, the portal had to be easy to use. Although the process the client was completing was extremely complex, the user experience needed to be highly intuitive and make significantly complicated actions straightforward. This meant it was imperative to simplify even the most intricate actions within the portal. Through easily identifiable Calls-to-Action, breadcrumb trails showing where the user was in the journey, and clear navigation to guide users around the portal, the wireframes offered a site architecture that had to be intuitive and engaging.

The project set out to meet two primary KPIs; to limit the inbound-calls into the telesales team to enable more outbound, business development calls and to reduce the number of legal cases that arise from the claims process. These have reduced by 78% and 40% respectively, far higher than anticipated.

Ordering portals

KPMG⁴ define six pillars of behaviour in B2B experience. These neatly encapsulate the factors that contribute to a long-term sustainable and profitable relationship between businesses and between companies and consumers. Ordering portals provide the perfect platform to effectively manage these pillars.



Personalisation



Time and Effort



Expectations



Integrity



Resolution



Empathy

Ordering portals are typically, but by no means always, deployed by business to business (B2B) focused organisations to allow their customers to order products regularly, quickly and easily. This type of portal is typically transactional with payment usually made in the form of invoicing allowing the customer levels of credit. However, credit/debit card payments are often used as well as, or instead of, the standard credit arrangements. Another must-have feature of ordering portals is mobile optimisation. Miller⁵ in his LinkedIn blog post about the most important B2B digital marketing statistics suggests that a vast majority (84%) of millennial B2B buyers think of their mobile device as an essential work tool and 76% of older B2B buyers do as well.

Regarding product management within ordering portals, in a B2B scenario, very often a customer knows what they want. Ordering is provided in such a way that the products can be ordered by part number, with saved shopping lists and the ability to repeat purchase quickly. There is less often a need to browse or explore the product information in too much depth.

Pricing is often based on bands or can even be customer specific, depending on what the customer has negotiated with the supplier. With some portals some customers may only have visibility of certain products due to factors such as their location, industry, level of expertise or other limitation.

Another common feature shared by ordering portals is integration into an ERP system which holds product information, stock levels and details on pricing which are then displayed within the portal.

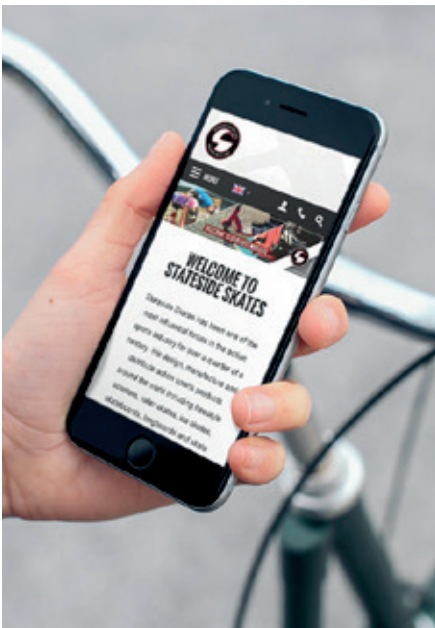
The following case studies from Stateside Skates and Saddleback illustrate how ordering portals deliver a secure, easily-managed and seamless B2B user journey.

⁴KPMG (2017) *B2B Customer Experience: Winning Moments that Matter*, <https://home.kpmg.com/content/dam/kpmg/uk/pdf/2017/05/b2b-customer-experience-report.pdf>

⁵Miller, J. (2017) *Our Pick of the Most Important B2B Digital Marketing Statistics for 2017*, LinkedIn, <https://business.linkedin.com/en-uk/marketing-solutions/blog/posts/B2B-Marketing/2017/Our-pick-of-the-most-important-B2B-digital-marketing-statistics-for-2017>

Customer case study 1: Stateside Skates

Stateside Skates has been one of the most influential forces in the action sports industry for over a quarter of a century. The company designs, manufactures and distributes action sports products around the world including freestyle scooters, roller skates, ice skates, skateboards, longboards and skate protection, all under its own exclusive brands.



PureNet built a fully integrated ordering portal for Stateside Skates that had addressed several core requirements for the business:

- ✓ Robust, powerful and fully extensible, the system is now at the heart of the organisation's business
- ✓ Clients across the globe use the system 24/7/365 allowing orders to be placed around the clock
- ✓ The solution provides customer specific pricing and updates stock from the Prima ERP

The results highlight the benefits a highly accessible ordering portal can deliver including a business wide uplift in orders (12%), and increased average order value placed of 16% and the ability to outreach to 55 countries.

Case study 2: Saddleback

Saddleback is a leading UK distributor of some of the most recognisable brands in cycling including Castelli, Sidi and Silca. Saddleback wanted to replace their offline ordering processes and deliver a secure and easy to use B2B ordering portal to allow dealers to buy and manage their account online.



Custom built by PureNet, Saddleback's online offering is a key aspect of their strategy going forward, encompassing a B2B portal with customer-specific pricing, integrated into SAP. The portal system provides a flexible, and scalable solution to adapt to their ever evolving business and offers Saddleback customers an intuitive, 24x7 online experience.

Saddleback's ordering portal incorporates full integration to SAP providing an efficient workflow that complements the company's existing business processes.

The business has grown substantially since adopting a successful portal strategy and the system is responsible for the bulk of transactions from Saddleback's network of suppliers.



Planning a portal

Now that we've looked at what we defined as the two primary web portals and how they can be successfully utilised, we will recommend the planning process to be used to find the best solution for your business needs.

Look at the pain points

Without doubt the first thing to address when considering implementing a portal is identifying pain points within your business. The Forrester WaveTM suggests that the Holy Grail for enterprises is a single view of the customer across all touchpoints and devices.⁶ To achieve this, you will need to ask the following questions.

How do you want your customers to interact with your business? Where in the engagement are they not interacting in the way you want them to? What data and information are you not gathering? How would you like to dissect and analyse this data to turn it into meaningful data? What elements of your engagement process take too long, are inefficient and/or are not as effective as you would like them to be?

Once you have addressed, frankly and honestly, these questions you will be in a position to formulate a portal strategy that could deliver significant business benefits to your company.

Taking away the pain

At this point of the portal planning process it is time to involve an expert. This can be a standalone consultant or consultancy who can help you firm up desired processes and formulate a brief or a portal development agency with strong consultancy credentials who can guide you through a Discovery Phase to ensure all your requirements are being captured and suggestions made on approach.

As part of this process of documenting requirements there will be a need to closely analyse different user journeys between your team, customers and potentially even third party stakeholder such as brokers, advisors or other roles.

A scope document will include such things as mapping user journeys, processes, goals that require completing, information that needs to be made available or submitted and documents that need uploading. This should all be documented and agreed before any significant portal development commences.

Integration

A common requirement in portal builds is integration with one or more systems. This allows the portal to push and/or pull data to and from third party databases. This automation can significantly save time and ensure the integrity of information by ensuring it updates across multiple platforms. Equally, it means information accessed by portal users will be accurate at point of consumption as it is updated in real time.

Each integration will need to be documented and specified and the most appropriate method of integration can be determined. Any portal developer selected should have a good back catalogue of delivering integrations as this requires considerable experience and skill in planning, specifying and delivery.

⁶Ask, J. A., Stanhope, J. & Naparstek, L. (2017) *The Forrester Wave™: Mobile Engagement Automation, Q3 2017, Automate Hyperpersonalized Engagement In Consumers' Moments*





Standard portal features

It is likely when assessing portal technologies and providers you will encounter two different avenues to go down. One is an 'off the shelf' portal solution and the other is a custom or bespoke portal. These have different appeals and it is likely your approach will be determined by your short, medium and long term requirements.

Off the shelf portal solutions

An off the shelf portal solution will typically have a large set of functionality 'baked' into the platform. These portals can be reasonably generic (e.g. a customer collaboration portal or an ecommerce ordering portal) or they may be extremely specific to a certain industry (finance, HR, heavy industry, etc.).

To many businesses this will have a large number of immediate short-term advantages, e.g.:

- A set of rich functionality 'out of the box'
- Industry specific standards

Off the shelf portal solutions provide the scope for configuration (i.e. making changes within the native platform) and, to a much lesser degree, customisation (i.e. making software code changes to alter the functionality).

The disadvantages of an off the shelf solution are that, even with rich configuration tools and the option of some custom development, the 'baked in' functionality may not meet your initial requirements and you may have to make sacrifices on your plans for processes and how you wish your business to engage with your clients.

Additionally, over time, your business is likely to change and adapt. You may wish to leverage your platform in a way that is not sustainable and you may lack flexibility in approach.

Bespoke Portals

A bespoke portal can be very similar in look and feel to an off the shelf equivalent. There are some quite profound differences, however. Typically, they are built on a portal framework (that is to say a set of components and tools that exist within a product environment) rather than an out of the box solution.

These components will typically use pieces of functionality such as a Content Management System to allow your site administrators to post text, images, PDFs and generally manage the content of your site. Many bespoke ordering portals will have a large number of components to allow products to be displayed and managed and may approximate an out of the box solution closely. However, due to the nature of the code they are more easily expanded upon and customised than an off the shelf product.

The advantages of a bespoke portal include:

- **Flexibility.** The ability to tailor the solution to match your preferred way of working rather than vice versa
- **Longevity.** As it is easy to adapt and change, even the most profound changes to your business processes and engagement models can be accommodated

A bespoke portal can often, but not necessarily always, be more expensive in the short term and this may present budgetary barriers to adoption. Additionally, they can take significantly longer to deploy as they are being built specifically for your organisation (think ordering food from a restaurant versus from a fast food outlet).





Benefits

Many of the benefits of implementing a portal solution have been covered above but it is useful to summarise them and highlight the very real differences a portal solution can make to a business in saving time, reducing costs, gaining revenue and providing peace of mind to stakeholders.



Increased Revenue

When deploying a portal you are making it easier for your customers to use your services or to buy your products. The direct impact of this is to increase your revenues. An investment in a portal can dramatically change how you do business and as time goes by and revenue generated by the portal increases you will be able invest more in fine tuning or completely altering your portal to better capitalise on your investment.



Cutting costs

Through automating manual processes and providing clear reports, a well implemented portal solution can significantly cut costs for businesses. Offering a straightforward interface into your processes means fewer customers will drop off mid-way through a task. By providing them with access to a portal offering information, products or goal-orientated journeys we have seen from the previous Auxillis example dramatic falls in inbound calls as customers are able to self-serve.



Customer Retention

Whether your portal is focused on helping your customers engage with your processes or making it easier to purchase from you, a portal can dramatically help the way you engage with your customers. By giving them an easy to use tool to interact with your business they will find dealing with your company a simpler and more positive experience which in turn leads to a higher level of customer loyalty.



Customer Acquisition

Many customers actively look for suppliers who can offer them a superb, online-only experience. Many customers may actually insist on this as a prerequisite for doing business with you and a customer portal will often appear in Request for Proposals (RFP) as a necessary qualification for bidding. Even if it is not specified, providing access to a high quality portal may differentiate your company and be a unique selling point when winning new business.



Integrated solution

By having information and data aggregated in a portal from across a number of ERP, finance, warehouse management, line of business applications and other systems, it can provide real interoperability across your organisation. Also, these systems need not be limited to your own platforms. External integrations to other 3rd party applications can also mean you are linking your portal outside your business to gain access to information you or your customers require.

Putting your customers in front of the right people

A key challenge for a business is routing its clients to the right person. As the processes and communication channels of a portal necessarily direct engagement channels to the right person or team, this reduces frustration from the customer and frees up your staff from trying to find the correct contact to help with an enquiry. FAQs, documentation and helpful contact information will provide what customers need, including online chat systems to further help with more complex requirements.

These days people's working times vary hugely and many individuals choose to engage online (in both B2C and B2B scenarios) across a 24 hour period. A portal will maximise this round the clock interaction with your clients. In addition to this, many of your customers will actually expect and demand this availability of access. The result of doing this will allow your business to service customers and/or trade with them when the office doors are shut and your employees have left for the day. It also helps address difficult surges in demand during standard office hours.

**WORKING
FOR YOU
24/7/365**

GET IN TOUCH

PureNet has been at the forefront of portal development, delivering successful solutions for content management, knowledge delivery, communication, social collaboration and business process automation to our clients for over 12 years.

If you would like to find out more about how PureNet can provide you with the ideal bespoke portal solution, contact us

portals@purenet.co.uk or 01904 898 444