

EMBRACE NEXT-GENERATION PORTALS

Advanced Portals Provide an Innovative and Flexible Infrastructure that Enable Companies to Capitalize on New Market Opportunities, Increase Cost Savings and Improve Organizational Efficiency

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NEW PORTAL POSSIBILITIES

Define the state of your company's portal: Is it fast and flexible? Interactive? Predictive? Most of all, is it helpful? Organizations in any industry have the opportunity to capture more customers and increase customer satisfaction, while also reducing costs, by using next-generation portal technology. For example, high-technology manufacturers can offer a better brand of customer self-service through lightning-fast searches of every back-end and front-end system—from service knowledgebases to customer-driven online communities. Insurance companies can entice their members to update personal information and submit or contest claims online. Municipalities can provide e-government portals for residents to pay their automobile taxes or parking tickets online.

Compared to when they first appeared, building an effective portal has become easier in some ways, and much more difficult in others. It has become easier because today's portal technology simplifies the process of creating fast and flexible interfaces that deliver information and applications to customers or employees in a single interface—the definition of an online portal. However, it has become more difficult because today everyone knows what a great portal looks like. Amazon.com, Facebook, Google, Flickr, Netflix and their Web 2.0-defining ilk have raised the bar for any portal experience. These leading sites continue to refine must-have portal features, including state-of-the-art interfaces, engaging interactivity and predictors for what customers will want to buy (or accomplish) based on previous activity. Either your portal resembles these sites, or it looks second-class.

FLEXIBLE FRAMEWORKS

Until a few years ago, portal frameworks were quite rigid, typically offering only a single, static view of information or content. The advent of Web 2.0 interfaces and Web Services—for easily sharing data between disparate applications and databases—combined with organizations' increasingly advanced CRM practices has led to the portal becoming a single location for delivering any type of information. As a result, portals—the Salesforce.com interface being one high-profile example—have evolved from being static HTML interfaces to something that is much more open, flexible and dynamic.

Today, organizations are also finding new ways to “mash up” their data. For example, when a customer requests a “live chat” for a service problem on a company's portal, the service representative's interface can display a list of pages on the site which the customer most recently visited, predict the top problems they are likely troubleshooting and list the best knowledgebase entry for each

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problem. In the time it previously took to “alt-tab” between different service applications, the service representative may have already identified and resolved the customer’s issue.

THE PORTAL PURSUIT

In today’s market, companies must pursue every opportunity to create differentiated offerings, attract and retain customers and reduce operating costs. Many portal infrastructures, however, expose very few business processes online, and do not take optimal advantage of a company’s existing technology investments and capabilities.

Based on its extensive experience in helping organizations refine their marketing, sales and service practices, Innoveer has found that any organization can get more from its portal by pursuing five best practices: identify the biggest opportunities for saving money by using a portal (almost always, this will involve self-service), review and streamline workflows exposed via the portal, manage data quality, find new ways to become more customer-centric and test all portal changes thoroughly. With these strategies, companies have a plan for creating innovative and flexible portal platforms to capture new market opportunities, increase customer goodwill, achieve ongoing cost savings and streamline operations.

PORTAL BEST PRACTICES

1. Identify the Biggest Opportunities (Hint: Self-Service):

To identify which portal improvement path offers the greatest opportunities, start by studying existing business processes: Which can be automated via a portal to save time and money and increase business opportunities and competitive advantage? Begin by tackling improvements which require minimal effort to automate, yet offer maximum return. For example, when one UK insurer reviewed its business processes to determine which to externalize via a portal, it found that customers who telephoned to update their addresses or personal information consumed the most service resources. Working with Innoveer, the insurer began handling such requests via its portal, which enabled it to retain fewer customer representatives—saving money and reducing administrative overhead. As an added incentive to use the portal, the company also started offering a discount if people renewed or applied for their plans online.

2. Revise Workflows:

The next biggest payoff for most organizations is to improve portal-related workflows. If portals expose business processes to customers, the prudent question is: Are they good enough to reveal,

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or are they so disorganized and repetitive that they should first be revised? One high-technology company, for example, needed to standardize its customer interactions. Previously, the company relied on many different processes, including a heavily customized computer telephony integration (CTI) application for service representatives to generate trouble tickets (service requests). However, customers preferred to generate and track these service requests themselves, online.

As part of a CRM software upgrade, InnoVeer helped the company revise its workflows and eliminate the old CTI technology in favor of a new eService module, including an online self-service portal, which has allowed customers to enter service requests and track repair statuses and dispatches. Going forward, the company also plans to tie a “cheap and cheerful” tool called Intimis into its CRM application, to help build customer profiles and create personalized, highly relevant offers, which will display in the customer’s portal.

3. Encourage Data Quality:

Achieving cost savings and increased organizational efficiency through portals hinges on the completeness and accuracy of the underlying data. Furthermore, portals often touch—but may not link up—with many other systems. For example, if a customer changes her address on the portal, will the invoicing, supply and customer service systems also record the change? Accordingly, as part of a master data management program, organizations must map data flows and ensure that any change in one system also updates the other required systems.

Arguably, however, data quality begins even earlier, with customer data entry. Namely, any miskeyed data requires time and money to fix. To prevent this, many organizations now use input validation tools to verify that any address,

10 Portal Payoffs

These 10 portal techniques reduce service costs while increasing customer satisfaction:

- **Delegate data entry:** Enable customers to update their own information
- **Prevent errors:** Validate all data as it is entered, before accepting it
- **Allow live chat:** Help keep customers online, even when they require live assistance
- **Use configurators:** When selling configurable products or services, provide customers with tools that configure and price their choices
- **Standardize workflows:** Automate business rules and processes to complete more sales without requiring more personnel
- **Quote automatically:** Ensure fast price quotes, which help capture additional business
- **Bill immediately:** On the back end, eliminate batch processing and invoice customers more quickly to improve cash flow
- **Share the knowledgebase:** Enable customers to search service information and FAQs
- **Track assets:** Show customers an inventory of all products purchased, outstanding service requests and repair statuses
- **Modernize the interface:** Integrate self-service, profile management, e-commerce, inventories, online communities, mashups and more into a single portal interface

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email or other information is accurate. Some organizations also go a step further, using tools such as Trillium Software to ensure not only data quality but to prevent duplication, by reviewing existing accounts to prevent salespeople from duplicating accounts or prospects in the CRM system.

4. Liberate Back-Office Data:

Refining and exposing business processes to customers via a portal gives organizations a surefire technique for streamlining internal workflows, eliminating roadblocks and automating many processes. But the most successful organizations take it a step further, by digging into their back-office systems, which traditionally—from an information perspective—have been very difficult to share.

For example, for its largest customers, one high-technology manufacturer now provides a list of all service requests—including statuses and whether a replacement or repair has been dispatched—as well as a complete asset inventory. Now, in one interface, a CIO or asset manager can see a complete list of all products purchased, as well as whether they are under repair. Especially for customers which must account for every last purchase, this capability greatly simplifies asset tracking, which of course creates customer goodwill as well as a portal on which they can rely. This capability also provides the manufacturer with a new channel for cross-selling and up-selling to its biggest customers.

5. Be Customer-Centric by Testing:

While leading Web 2.0 websites such as Amazon.com and Facebook may show the way, no simple formula exists for how to build a great portal. Rather, creating an excellent portal involves trial, error, testing and then more testing. But how can companies entice and organize groups of customers or geographically-distributed employees to help refine the portal?

InnoVeer has helped many clients address this problem, starting with creating clear objectives for what the portal must enable, as well as metrics for success. InnoVeer also helps organizations organize pilot groups to test portal beta versions. Some organizations offer customers rewards to participate, but for sites with extremely devoted members—like eBay and Flickr, for example—simply being on the pilot team may be reward enough. Beta testers also serve as ambassadors and de facto frontline support teams for the new portal, promoting adoption.

THE PORTAL PAYOFF

Regardless of industry, having a great portal is no longer optional. The more customers can accomplish online, the less they must contact customer service, which saves a company time and money.

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In addition, consumers are happier—and more loyal—when they can conduct business online instead of waiting in customer service telephone queues. To go one step further, many organizations can also use their portal to up-and cross-sell products and services to existing clients, maximizing revenue.

Accordingly, organizations that want to capitalize on new market opportunities must advance the state of their portals. Only flexible and innovative portal infrastructures will enable them to take advantage of their existing CRM capabilities, streamline business processes, decrease costs and rapidly test and release new products and services, one high-value feature at a time. For organizations that embrace next-generation portals, these are the payoffs.

ABOUT INNOVEER SOLUTIONS

INNOVEER SOLUTIONS, an award-winning CRM consulting firm, provides advanced services to life sciences, high-technology and insurance companies, among others, in the areas of planning and strategy, technology implementation and optimization. The company's deep industry knowledge, broad technical skills and Multishore Methodology enable organizations to address their critical customer-facing issues and achieve an integrated view of all customer information. With an exclusive focus on customer management since 1998, Innoveer has worked with more than 400 organizations to increase their overall business growth, improve internal efficiency and enhance the customer experience.