



Web Based CRM

Tutorial

Part 4: Building an integrated online Portal

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Introduction

Web portals have been around for many years now – but they remain one of the most poorly understood and mis-described technologies. In fact, the word “technology” is also inappropriate because Web Portals are not represented by any one technological solution: they are rather a collection or agglomeration of several technologies all conspiring together to deliver a viable solution for the client. Or not, as the case can often be.

In simple terms, Web Portals are a common interface or gateway which users can interact with in order to find out information or transact with an organization. But even that covers a multitude of applications, standards, solutions and outcomes.

Therefore, you could equally argue that a Web Portal is any web site that is updated frequently by the host and delivers value to the user!

So, rather than get hung up in the semantics of what it is – let’s take some time and talk about **what a Web Portal does** and, more importantly, **what it can do for you** and also **why it is important** to the average business.

Before we get to the meat of the matter, it is worth taking a look at the projections being pumped out by Forrester, Gartner Group et al on the prevalence of portal technology:

“Forrester itself sees the (portal) market as a steady grower, with application integration at about a 4 to 6 per cent growth in 2004, and portals at about 10 per cent. It reckons the enterprise portal market is a \$1bn business but doesn’t see it extending beyond the \$3bn or even \$2bn stage within the next three years.”

Gartner broadly agrees with these figures and adds that the indicative geographical split of spending is 60 per cent North America, 24 per cent Western Europe, with Asia Pacific, Eastern Europe and minority implementations making up the rest. Drakos admits that this perspective is muddled slightly by the unaccountable number of homegrown implementations in Eastern and Southern Europe and by the use of open source technology, particularly in France and Germany.”

Source – Silicon.com.

All of the above suggests that portals are here to stay and that if they are not impacting your life now, they will be very soon indeed. The Enterprise marketplace is already adapting their businesses towards a portal based approach. The SMEs will be next.

Just to reinforce the point – try a search for “instant portal applications” in google and see how many matches are found...that’s slightly more than “comprehensive fire insurance”...



What should Web Portals do?

The catch-all phrase of “Web Portal”, as we have established, covers a multitude of technologies, opinions and solutions. But fundamentally they should do certain things or address certain issues. The word “should” is used advisedly here because depending on the definition of “Web Portal”, the solution may or may not deliver these outcomes. However all industry experts and analysts are agreed that a true Web Portal must cover all of these critical areas.

Integration

One of the key requirements in most organizations is the integration of disparate “legacy” systems into one coherent user interface. This has been a Holy Grail for IT professionals for decades: Systems Unification where data is shared and knowledge dispersed. Yet until now it has been extremely difficult to achieve. The technology, and more importantly, the standards being deployed within portal development mean that connecting up even very archaic legacy systems is now possible.

Imagine: one customer “Home Page” where you can go to find out all of the communications or interactions with a customer...all the sales opportunities, all the service issues, all projects, all documents, all products bought, all contacts, all financial information...irrespective of which underlying system it resides in. And then imagine going one step further and creating a single transaction (such as a timesheet entry) that updates the Customer Service record, the Project file and the Costing System automatically. Think of the time-savings that can create as well as the reduction (and possibly elimination) of re-keying errors as data is entered once and processed as many times as necessary.

That’s portal integration in action.

Niche Developments

In every organization there is a known truth: the software you buy to do a given task will perform 80-90% of that task perfectly but will fail in some areas. It’s how you deal with these failings that determine whether the solution will work. Also, you can’t stop change: what was perfectly adequate as a software solution last year may not cope with a specific new set of circumstances that may only exist for a few months (such as an ad hoc/one-off project or a pilot new venture). Every businessperson knows that the key is to be able to react quickly and be flexible.

The general weapons of choice to solve these deficiencies are MS Access and MS Excel. Both admirable products and both capable in their own right – but both fundamentally flawed.



For a start the applications rapidly grow beyond the original scope thereby diverting resources from doing “real” work to managing systems development. They are not well suited either to multi-user environments or environments where the information is dispersed remotely. Finally they tend to create even more “islands of information” and encourage empire building: what happens when you rely on one key Access database and only one person knows how to operate that?

A true Web Portal solution should come with a complete set of tools to allow you to develop your own applications quickly and without the need for expensive programmers; it should then allow this application to be deployed within the portal and covered by the security policies in place so that users can access the systems they need in a controlled way.

Driving down cost of ownership

One of the great things about Web Portals is that it is virtually free to add new users. That statement needs qualified of course: there is the cost of the portal software and also the deployment costs, but once those have been paid then it costs nothing to add additional users. This is in sharp contrast to traditional application models such as finance and CRM where the software is priced based on the number of concurrent users.

The reason for this portal pricing model is technological rather than benevolence on the part of portal software developers: a Web Portal “client” is a browser such as Internet Explorer. That software comes bundled with the PC or operating system and so the number of end users cannot, in fact, be determined by the portal application.

Of course, some portal applications are priced per user and these tend to be hosted or Applications Service Provision (ASP) offerings where you rent rather than buy the software – solutions such as our own [iportinstant](#) for example. But even with such a model, the real cost per user is a fraction of the more traditional software model. For example; iportinstant costs \$10 per user per month for a very functional CRM solution...contrast that with a whopping \$1500 per user (plus annual support fees at 20%) for a similar packaged CRM solution and you can easily see why hosted portal solutions such as iportinstant are taking off.

Ease of use

Because Web Portals are deployed over the Internet and are therefore accessible to a wide variety of users, it means that by their very nature they need to be intuitive and easy to use. Web Portal software should be able, therefore, to be customized to look just like your business web site – albeit that there will be an additional login feature so that you can screen who is on and what they are allowed to do.



External access

The technology that is employed to develop your Web Portal means that it is instantly available from any remote location that has internet access. This makes Web Portals hugely powerful tools for the travelling business person or field sales personnel – a completely mobile office solution where they can have access to transactions, participate in online discussions and be updated with relevant news items.

This external access extends to customers, suppliers and stakeholders too and professional Web Portal software will encompass comprehensive security and relationship management tools to allow you to define User Roles as well as individual permissions on transactions, pages, and even data fields.

This gives you an unprecedented level of control over your information systems in terms of how you can use it, who gets to see it, the method of communication and how your business relationships develop.

Productivity gains

There is little point in deploying any software unless you get something back for it and Web Portals are no different. Where we have found the main ROI to exist is in squeezing out the waste caused by duplication of input, operator errors, data mining and subsequent rehashing through spreadsheets, data fragmentation and inadequate adherence to procedures.

In addition to the internal savings, by deploying a customer service focussed Web Portal you can dramatically reduce your administration costs by having your customers do a large proportion of your administration.

Let me illustrate: Customer A has a problem and calls your customer service staff. They are on the other calls and have to call the customer back. When they call, the customer is busy and so they leave a message. Customer calls back and the service staff are in a meeting...and so it goes on. This kind of telephone ping-pong sucks up vast amounts of time and resource, adds to frustration and drives out value from the relationship.

Contrast that with this scenario: Customer A has a problem and logs onto your Web Portal. They browse the knowledge base and find an answer to most of it allowing them to continue but still have some questions. They log a call which is routed directly onto your service Q. A service engineer picks up the call from the Q and deals with the issue by replying online or calling the customer back.

Simple. Efficient. Productive. Profitable.



Innovation

It is a fact that if you use application software such as Microsoft Dynamics Great Plains, you will run your business in pretty much the same way that all the other MS Great Plains user do. Ok – there are parameters and a fair degree of scope within that, but fundamentally application software works the way application software works and if you do not adapt at least some of your business processes to it then you will have to plug those gaps in some other way.

Web Portals however are a blank canvass. You can take a system such as MS Great Plains and radically alter how your business processes its information and how it interacts with the outside world by fronting it with a Web Portal solution.

Personally this is what I like most about Web Portals: up until now almost all software decisions have been predicated on a “keep up with the Joneses” approach. Web Portals allow you to completely redefine how you do business and how you can service your customers, staff and stakeholders.

In short – if you can imagine it, you can do it!

What should Web Portals do for you?

It's all very well looking at the functionality of a Web Portal in general terms and for sure you need to be aware of all of the preceding; but what makes it all so important is what it could do for you and for your business. The answers are different for every organization of course, but some of the following are more than likely to figure in your shopping basket.

Executive Dashboards

This is THE current hot topic and MUST HAVE feature. Dashboards however have been around for years (we launched our own within our iport portal back in 1999) but it is only now, with the advent of the integration tools that are available within Web Portals, that they are gaining such traction in the marketplace. The basic concept is simple: a Dashboard consists of a set of early warning indicators (ours are red amber and green traffic lights) that show the status of various Key Performance Indicators (KPIs) within your organization.

The concept may be simple but accessing the data required and building the right rules is not always so straightforward.

Care must be given to how the data is measured and what trigger points are employed or, rather than management by exception, there could be a tendency to micro-manage. Also the old adage "What gets measured gets done" needs to be tempered by the fact that what gets measured changes behaviour and not always for the better. If you build KPIs that do not reflect your organizational goals but simply satisfy management curiosity then you will very quickly find your Web Portal Dashboard telling only what you want to hear, not what you need to know!

Great examples of KPIs are monitoring service levels or project deadlines. Sales tasks too are easy to classify: it's either done by a date and time or it isn't! Slightly more difficult (but not impossible) are HR type objectives where the outcome is not so cut and dried and evidence is not easy to quantify.

In any event, Dashboards are a major feature of any Web Portal and deliver very powerful task based analytical tools to individuals which helps them manage their own time and also to management to help them manage the individuals.

Operations Improvements

Every operation can be improved. There are no exceptions. That does not say, though, that every operation can be improved by a Web Portal. Certain processes, though, do lend themselves extremely well to portal environments:



- Single point of data capture
- Several underlying systems that use that data in some shape or form
- Data that needs to be re-keyed into these systems in order to satisfy management information requirements.

A classic example is the Timesheet entry which is used to a) record and analyse staff time b) update customer records and/or project records c) update costing information in the finance system. Many Time Recording systems are contained within project management software of course and so already function in this way, but just as many are stand-alone and have to be analyzed and re-input several times to different systems. We have even seen one “system” where it was a sackable offence for the staff not to complete a paper timesheet, but the volume of paperwork was so great that management couldn’t analyze them and actually had them shredded every week in secret!

In every case where a Web portal has been deployed to manage capture and update of multiple data systems we have seen a huge improvement in productivity, accuracy and even morale.

Workflow & Procedures Management

Workflow (and its bigger brother Business Process Management) is at the heart of every good Web Portal. Part of portal software should always be some form of process management software whereby your organizations critical activities can be defined and scripted so that they flow more smoothly. This is particularly important when legacy systems are being “joined” up: you need to make sure that data being passed between them is backed by solid process logic and procedures in order to maximize the value of the integration.

Many legacy systems offer the capability too of storing information in a “raw” form i.e. the data is simply recorded as an afterthought or addendum to the main purpose. A good example here could be the Payroll or HR system storing details of a staff member’s professional certifications. You can then use that “dead” data to hook into a portal driven process that checks the certification, maps it to the renewal dates and then takes the staff member through a process which insures that he/she takes all the necessary steps in order to make certain the certification is renewed on time.

Task Orientation

Perhaps the most productive aspect of Web Portals is the bias for action that they engender. Staff logging on to the system are automatically fed with key tasks that they have to perform; be they sales, service, project, document, business plan related. This task orientation helps drive the organization forward constantly and ensures that objectives are met.

Of course, many legacy systems and CRM systems have the ability to record tasks and track them through to resolution. But the unique dimension a Web Portal brings is that these tasks can be organized and delivered to the user *together* i.e. the user doesn't need to log in to the finance system to see the credit control tasks, nor the service system to see the service tasks, nor the HR system to see the objectives...they are all presented on their home page for action. It's also possible to link the task system into diaries such as MS Outlook. And finally, the fact that the entire system is web-based means that tasks can be accessed and progressed from any internet connection, at any time, anywhere.

Relationship Management

By relationship management I do not mean CRM. CRM is a software application and, whilst portal solutions such as our [iportprofessional](#) and [iportinstant](#) have CRM applications already inbuilt, what is really important in a Web Portal is a wider capability to manage relationships at all levels. Relationships between staff, between data sets, between legacy systems, between customers, consultants, stakeholders, projects, assets, events...the list can go on.

The best Web Portal solutions will allow you to create deep and complex relationships within the system, yet deliver these to the user seamlessly and in a manner that is simple to understand. For example: let's say that you want to see all the contact points you have with a customer – sales, service, finance, projects, documents, products sold...on reaching product sold you want to browse “sideways” and see more info on that product: training manuals; datasheets; technical drawings; other customers who have bought it; service issues...you then want to access details of the project manager who looks after that product: personal details; certifications; accounts they look after...

Web Portals need to have the capability of building these relationships throughout your systems so that they can deliver real value and ROI.



Remote Access

Well, it wouldn't be a Web Portal if it did not support remote access! There are some considerations to be borne here though: how well has the security policy been defined and can the system cater for User Roles. Roles allow you to define global permissions, processing and access policies to data and underlying legacy software.

These policies need to extend right down to individual Users, but it is also imperative that you can define a generic "customer" and make their access rights different from a member of staff or a supplier. In all cases, users should be able to do the same things remotely (i.e. an Extranet) that they can in-house (i.e. and Intranet).

Security and Audit is paramount. The Web Portal must be totally secure and every login, process, screen accessed, data filed updated and pathway through the portal must be tracked and audited end to end. This is essential: if you are integrating several legacy systems then a mistake in one place could precipitate a cascade of errors and you need to be confident that you can back that transaction out again. It also tells you which part of the portal is working for your "customers" and which parts are not.

Summary

Web Portals are becoming more and more mainstream, particularly in the Enterprise arena, and cannot be ignored by the SME sector. The key though is to build them in a strategic fashion:

- 1) Select a key area where user buy-in can be secured quickly
- 2) Develop a “pilot” or “proof of concept” policy that ensures you do not need to spend vast sums on infrastructure, hardware and software (a hosted solution for example initially)
- 3) Identify a number of champions who will run with the solution and test it thoroughly
- 4) Build a staged or phased approach to the project so that the entire solution develops in line with the benefits you receive.
- 5) Drive everything you do through the portal so that it is continually used and seen as the main contact point for information and transaction processing in your organization.



About iport4business and the Author

The author of this series is Chic McSherry, CEO of iport4business. Chic started his first IT company 20 years ago – a reseller business most recently involved with Sage and Microsoft Dynamics - and he has been deploying CRM solutions since 1994. In 1999 he developed an Enterprise Information Portal with CRM at its heart. That software is called iportprofessional and has been sold successfully, winning several innovation awards, both here in the UK and in the USA. In 2004 he created a separate company to market the product called iport4business and established a US office in Houston, Texas. In 2005 he launched iportinstant – a web-based CRM product based on iportprofessional which has a growing user base due to its simplicity and low cost (\$10 per user per month). A fully functioning 14 day free trial CRM system is available from the iportinstant web site. In addition, he runs a Sales Training company called AchieveMore.

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