



Four Types of Portals That Solve Enterprise Problems



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Introduction

In this e-book, you will learn:

- How modern portals solve common problems in digital business
- Best practices for designing different types of portals
- How digital leaders use portals to achieve concrete benefits
- How portals will be influenced by new technology trends



01

What is a Portal?

What Defines a Portal?

A portal is a web-based platform that collects information from different sources into a single user interface.

For enterprises, portals are a way to provide a tailored experience to key audiences such as customers, partners or employees. Instead of making users navigate through multiple pages to find the content they want, portals surface relevant content based on the user's context.

To achieve this, portals leverage custom user roles, permissioning and reusable content. By automating much of the curation process, companies can quickly publish new content or applications and know that only the right users will see it.

The better you know your user, the more successful your portal will be at providing relevant content.

Portals vs. Websites

Websites are meant to drive traffic, whereas web portals are for limiting traffic to a specific group of users.

Most web portals require a user to log in, which allows the site to deliver more specific content and services based on who that user is. Websites are destinations that everyone can get to and are generally designed for a broader audience.

Before launching a new portal project, ask whether you have a big enough audience to justify a portal.

Does the audience have specific needs that can only be met with a portal? Portals make personalization easier, but also require careful planning and user research to ensure that the tailored experiences they offer are truly what users want.

A single portal can accommodate the needs of many audience segments by assigning user roles, but if the scope becomes too broad a website might be a better solution.

Modern Portals Have Broad Characteristics

When designing a portal, companies should hone their strategy according to three key areas:

Content, Access and Form.



CONTENT: AUDIENCE AND FUNCTION

Portals personalize content based on a balance of audience and function. The more specific the audience, the more specific kinds of functions the portal will need to provide.



ACCESS: EXTERNAL AND INTERNAL

Though portals usually require a login, they can still be either internal or external. An employee portal may show a login page to anonymous users, whereas a customer portal could show almost the entire site and ask users to log in for limited features.



FORM: GATEWAYS AND DASHBOARDS

Both gateway- and dashboard-style portal interfaces provide personalized information, but a gateway will usually have a set of portlets that update content dynamically. Dashboards, on the other hand, allow users to see applications or services that change depending on their role and what work needs to be done.

With the expansion of features in most web platforms, you don't necessarily need portal software to achieve a good portal. Think about what you need from each of these areas to meet the expectations of your audience and work with your development team to figure out the best way to achieve that experience.

What Problems Do Portals Solve?

There are many types of portals, but they overlap in functionality and purpose, even between diverse industries. Most enterprises use multiple portals in their organization to provide customizable experiences for different audiences.

There are several common problems that portals solve across the board:

1. Users have difficulty finding the content they need.
2. Daily tasks require users to log into different sites or search for different applications.
3. Current tools for collaboration and communication are inefficient and restrict access.
4. Users don't stay engaged beyond initial interest.

Of the many kinds of portals that exist today, there are four common types that enterprises use to solve the problems described above: Self Service Portals, Internal Service Portals, Social Collaboration Portals and Partner Portals.

A hand holding a white stylus is interacting with a tablet. The tablet screen shows a dashboard with various charts and data. A large blue semi-circular graphic is overlaid on the right side of the image, containing the text '02' and 'Common Types of Portals'.

02

Common Types of Portals



Self Service Portals

Customer self service portals are one of the most common types of portals and are an easy way to reduce costs for most companies. They allow customers to answer common questions without having to contact a service representative directly. They save time and money by decreasing the number of calls, and often improve customer satisfaction by providing answers more efficiently.

Self service portals are used to quickly deliver answers to users who don't want to spend much time on the site. Users only search for a self service portal when something has gone wrong, which means they are already frustrated or confused when they enter the portal. Self service sites frequently use intelligent search and a well-organized content library to make it simple for users to surface the answers they're looking for. Other functionalities could be forums, where users answer each others' questions, or chatbots to help users get to the right article more quickly. The key is to have tools in place to filter out irrelevant information so users can quickly get what they need.

KEY CAPABILITIES FOR BUILDING SELF SERVICE PORTALS:

- Web Content Management
- Search
- User Roles and Permissions
- Metadata and Tagging
- Integration with Customer Service Call Center Systems
- Chatbot Integration



Allianz Australia Insurance Ltd used self service features in its customer portal to give users a comprehensive overview of their insurance policies, account history and purchases. Using a portal platform allowed the company to create a personalized experience for more than two million policyholders in Australia.

Companies can gather valuable data by tracking user behavior on self service portals, such as the questions that receive the most traffic. This can be applied to the current product to improve its weakest areas, so the portal also acts as an additional channel for valuable user research.

The screenshot shows the Allianz 'My Insurance Portfolio' web interface. At the top, it displays the Allianz logo, the user's login status ('You are logged in as:'), the current date and time ('Thursday 23 July 2009 (4:08 PM EST)'), and a 'Return to Allianz website' link. Below this is a navigation bar with 'My Portfolio Home', 'Change Password', and 'Update My Details' links. The main content area is divided into three sections: 'My policies', 'My quotes/applications', and 'My policies with other insurers'. The 'My policies' section contains a table with columns for Type, Details, Policy number, Premium, Valid until, and Action. It lists two policies: Car Insurance and Life Insurance. The 'My quotes/applications' section shows a message that the user has no quotes or applications. The 'My policies with other insurers' section includes a form for adding new policies with fields for Type, Insurer, Policy number, Premium, and Valid until. A sidebar on the right offers a 'Get a quote and buy online' section with buttons for car, home, landlord, and life quotes.

Type	Details	Policy number	Premium	Valid until	Action
Car Insurance			\$585.45	26 Aug 2009 Renewal due	Renew Policy View/Change
Life Insurance			\$33.69 monthly	-	View/Change

Type	Details	Reference number	Premium	Valid until	Action
You have no quotes or applications in your insurance portfolio.					
Life Insurance	If you have a saved life application you can retrieve it online.				Retrieve life application

Type	Insurer	Policy number	Premium	Valid until	Action
Car			\$		Add policy



Internal Service Portals

There are many flavors of employee portals, but one of the most valuable is an internal service portal. Like self service portals, internal service portals allow users to take independent action when something goes wrong. For companies with thousands of employees, an internal service portal relieves the burden of manually tracking people's requests, while still ensuring that any issues they raise are resolved. Whereas a self service portal is usually for customers to quickly find information, an internal service portal is for employees to both find answers and submit requests to address issues in the office.

KEY CAPABILITIES FOR BUILDING INTERNAL SERVICE PORTALS:

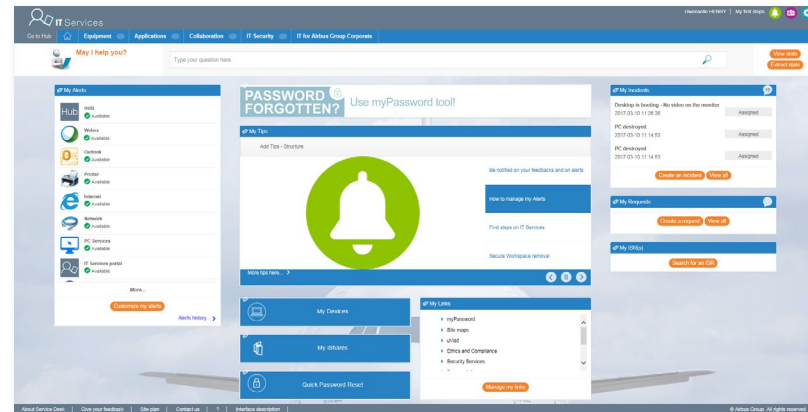
- Workflow Management
- Form Creation and Data Collection
- Mobile-Ready or Native Mobile App
- User Management
- Web Content Management
- Application Integration Platform

Most organizations have a number of internal services that receive frequent requests, such as IT support, facilities management (such as turning down the air conditioning) or the status of financial reimbursements. Usually, this type of portal will include the ability to track the status of a user's request, so they can see it move through its workflow and know when it will be completed. Robust communication tools aren't necessary; rather, the goal is to let employees get in and out as quickly as possible, so they can move on with their work.

AIRBUS

When Airbus found its service desk overburdened, it launched an internal service portal that decreased incidents by 30%. The new site makes it easy for employees to track the progress of service requests.

By showing the status of different requests, companies can reduce the time spent contacting co-workers for updates. Automatic notifications can let departments know when there's a new request, and categorization can simplify the process of prioritization and scheduling of new tasks. Internal service portals can be independent sites or incorporated into the corporate intranet.





Social Collaboration Portals

Another type of employee portal is a social collaboration portal, which brings communication tools into an interface with a social media-like experience. Employees can share information, comment, reach out directly to coworkers and collaborate on projects within one site, rather than storing communication across email, online word processors and other applications.

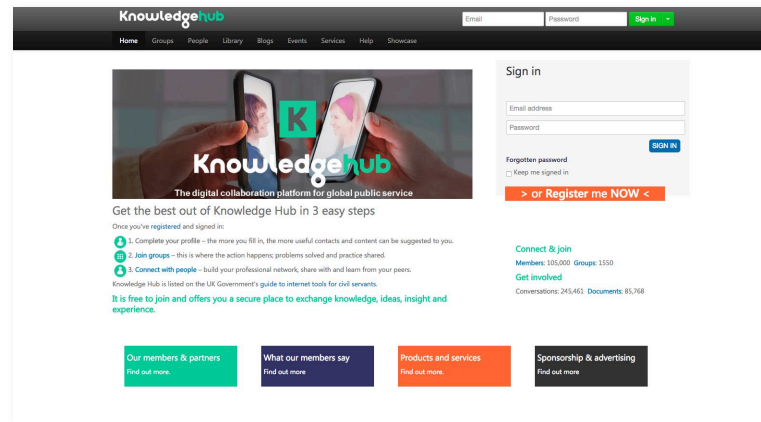
One concern companies have about social collaboration portals (sometimes called social intranets) is that they will negatively impact productivity and become a distraction for employees. To avoid this, you should carefully curate the features available in the portal. It doesn't need to work exactly like Facebook; focus on creating useful tools that solve communication problems in simple ways.

KEY CAPABILITIES FOR BUILDING SOCIAL COLLABORATION PORTALS:

- Blogs and User Profiles
- Direct Messaging or Chat
- User Management and Group Management
- Document Versioning, Commenting and other collaboration features
- Unified Document Library
- Mobile-Ready Website or Native Mobile App

Knowledgehub

During 2016, Knowledge Hub saw more than six million page views, one million visits, 25,000 conversations and 10,000 documents shared in its newly updated social collaboration portal. Membership currently spans 80 countries, with a success rate of 70% for all of its communities.



One of the greatest benefits of social collaboration portals is the transparency they bring to projects. Pulling everything into one site makes it easy for your employees to go back and search for comments, feedback, old versions of documents or other conversations. It also makes it possible for adjacent departments to keep up with new projects that may affect them. Permissioning or creating private pages can handle any access concerns for projects that shouldn't be exposed to the entire organization.



Partner Portals

Most large enterprises benefit from a robust partner network. Because partners are neither an external (customer) audience or an internal (employee) audience, having a dedicated, personalized partner site ensures they stay connected and receive critical updates on company information.

In many ways, partner portals are just another flavor of an employee portal or intranet. The guiding principle in designing the portal is understanding what information partners need to get their work done. Partners shouldn't be burdened with all company conversations, so content should be pruned as much as possible. Partner portals also provide direct access to representatives within the company. Establishing a positive partner experience that allows them to feel heard and makes them more successful at their jobs is essential to maintaining a successful partner program.

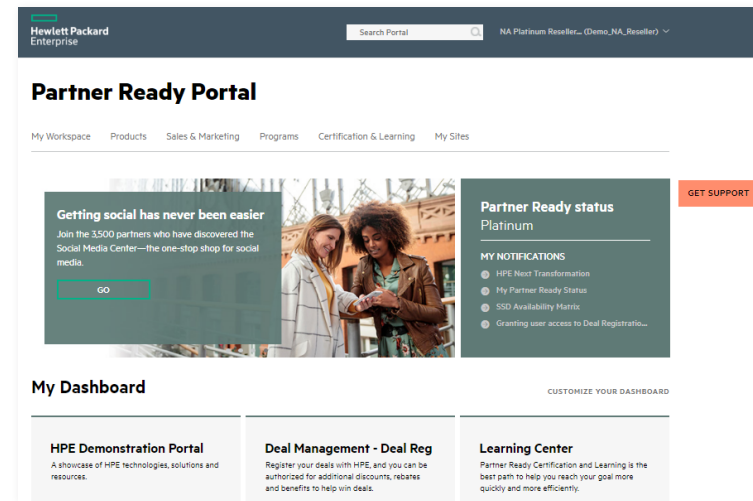
KEY CAPABILITIES FOR BUILDING PARTNER PORTALS:

- Web Content Management
- User Management
- Mobile-Ready Website or Native Mobile App
- Site Hierarchy and Site Creation for different partners
- Email, Chat or other messaging features
- Forums



Hewlett Packard

Hewlett Packard united 170,000 channel partners across 174 countries in 25 languages with the launch of their global partner portal. This audience is crucial to the success of its business, and the new portal tripled partner satisfaction across the board, while simplifying the work it takes to maintain the site. At first glance, the capabilities for a partner portal seem identical to other portals. The distinguishing features are realized in the unique needs of a company's partner network. Just as a company's public website is most influenced by its target audience, a company's partner portal ultimately depends on what services need to be provided to partners for a positive experience.



Demands Are Growing

New technology, especially in the form of connected devices, is growing and influencing the expectations users have for digital experiences.

- 35.6 million Americans use a voice-activated assistant device at least once a month in 2017.
- B2B IoT devices such as industrial sensors or in-store analysis devices will grow from 2.5 billion connections in 2017 to 5.4 billion devices in 2020.
- Wearable devices will grow from 28.3 million units sold in 2016 to 82.5 million units in 2020.
- 40% of consumers do not care whether a chatbot or a real human helps them, as long as they are getting the help they need.

How might the growth of these devices impact the content within your portal? Employee portals may need to include data analytics drawn from industrial sensors in factories. Customer portals might need to be viewable on smart watches or other wearables. Chatbots and voice may be able to replace traditional search, but require more natural content and possibly AI software to execute.

Enterprises need to view new technology and devices as part of a unified, omnichannel strategy to get the most of out of their technology investments and leverage data across the organization.



03

How Are Portals Evolving?

Portals Are Designed for Integration

One way to prepare for the rise in devices is to use a platform that facilitates customization and integration.

Portal software was designed to integrate different systems under one presentation layer. It is uniquely suited to solving the integration challenges that come with the rapid growth of devices and software today.

There are many applications that are useful across different types of portals. Enterprises can extend the value of their portals by building on a single platform and reusing applications at different touchpoints. Sharing data across systems can also lead to additional business insights that can be applied to improve processes and communication, ensuring that unwieldy technology is never getting in the way of your business strategy.

Should You Add New Technology to Your Portal?

With so many opportunities available for companies, it can be hard to know if it's the right time to bring in a new technology like chatbots or virtual reality. Is it best to be one of the pioneers, or should you wait until other companies jump on board?

There is one question companies should answer when considering when they want to add new components to any portal project: Does it solve a problem?

When mobile apps first became popular, many companies rushed to release apps for their customers. However, without a long-term incentive to download and use the app, most users ignored them, leaving companies with a costly and ultimately wasted investment.

We're seeing a similar pattern with virtual reality and other innovations today. Before you work it into your portal project, make sure it solves a problem for your audience and still serves the purpose of delivering the right content to them.

Conclusion

Digital transformation requires significant shifts in business models and corporate culture, and portals play an important role in guiding different audiences through that. Portals have evolved over the past 10 years, but they have always been defined by one core priority: delivering a personalized experience that filters out the noise and offers only what is relevant to the end user. With the increasing emphasis on customer experience, portals remain a key part of any digital transformation strategy.

Moving Forward

Liferay Digital Experience Platform helps you create portals that connect people and systems through a modern interface focused on getting work done. Learn how at liferay.com/solutions/portals.

Want a free demo of what Liferay DXP can do? Let our Sales team walk you through how Liferay DXP can solve the business challenges you're currently working on in your portal. liferay.com/request-a-demo





Liferay makes software that helps companies create digital experiences on web, mobile and connected devices. Our platform is open source, which makes it more reliable, innovative and secure. We try to leave a positive mark on the world through business and technology. Hundreds of organizations in financial services, healthcare, government, insurance, retail, manufacturing and multiple other industries use Liferay. Visit us at liferay.com.

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