

3 Strategies to Unify Customer Experience with a Customer Portal

Introduction

Providing a unified experience that's intuitive for customers is the foundation for excellent customer experiences. But it can also drive internal efficiencies, such as consolidating customer data and automating business processes.

However, delivering unified experiences often is hindered by siloed and disparate systems and applications. Most businesses already have multiple systems in place to help serve their customers; in fact, the average enterprise uses 120 marketing tools.¹ As businesses grow, this number will only increase and result in a disjointed tech stack, siloed data, and inefficient processes.

In this whitepaper, we'll discuss how you can overcome this challenge and what strategies are needed to deliver a unified customer experience that can help both customers and internal teams to be more efficient.

3 Strategies for Unifying the Customer Experience

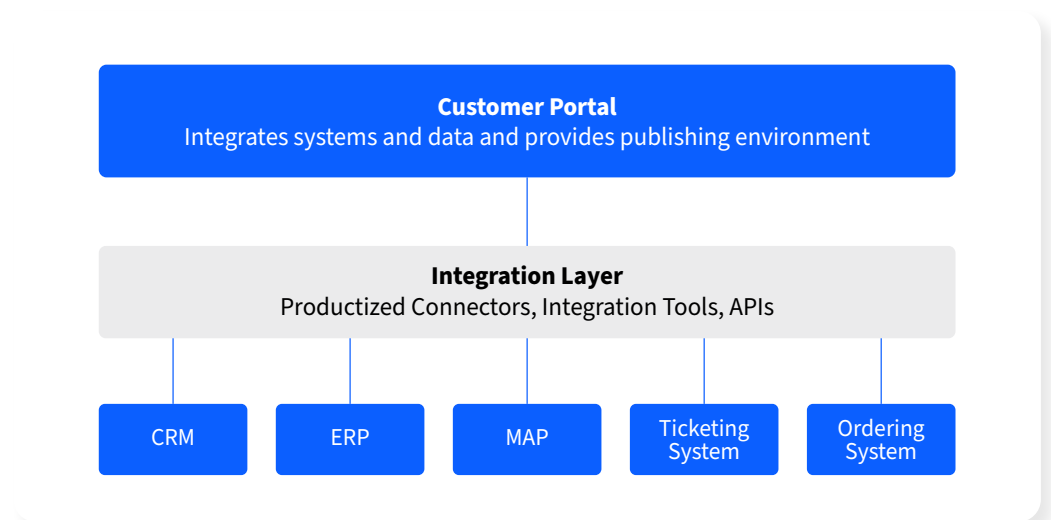
Unifying the customer experience begins by providing your customers with a single gateway to access the content, tools, and resources they need – and doing so in a way that's consistent with your brand. A customer portal can help you accomplish this by connecting systems in your tech stack to each other, automating business processes, and delivering a consistent look and feel across your site. Ultimately, this helps you streamline the overall customer experience and enables your teams to operate more efficiently.

Here are three strategies you can use to ensure that your customer portal is able to deliver a unified customer experience:

¹ 10 Data Stats for Your Martech Stack

1. Connect Siloed Systems to Streamline Customer and Employee Experience

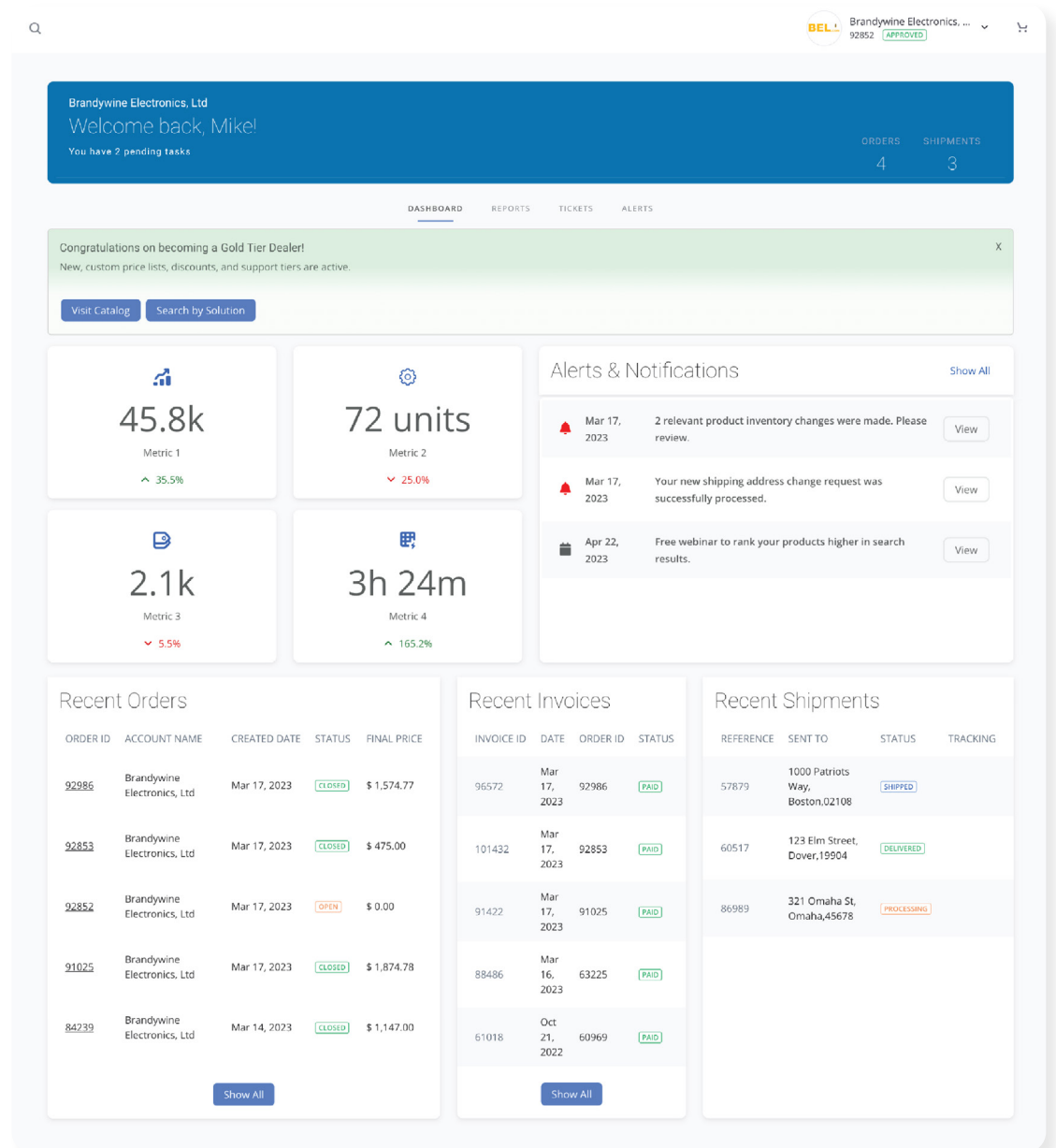
Before you can streamline the user experience for your customers and employees, you need to ensure that the relevant systems and applications in your tech stack are connected.



A connected system makes it easy to automatically pull in relevant documents, tools, order status information, or important notices your customers care about in one view, so it's easy for them to access what they need.

It also makes it easy for your sales or service teams to access the information they need to serve their customers.

For example, a dashboard could automatically display customer invoices from your billing system, orders from your ordering system, and past issues from your ticketing system. And all this information would provide your teams with the relevant context they need to help better serve their customers without needing to go into separate systems to gather that information manually.



Customer Dashboard

A customer portal can provide different ways to connect the applications in your tech stack together. Depending on the vendor you choose, below are some of the ways different customer portal solutions can help you connect your systems:

Productized Connectors

A productized connector is a product that is pre-built to work with a specific system such as a CRM, MAP, or ERP. Productized connectors accelerate time to market by allowing you to connect to systems using basic configuration options instead of having to build your own application. A connector is typically the fastest path to

integration, but it's usually only designed to perform a predefined set of functions. If you need extra functionality, you would need to build it yourself with an integration tool or API.

Integration Tools

Integration tools, such as Talend Open Studio or Mulesoft Anypoint Platform, provide an interface that makes it easier for your developers to build and test integrations. An integration tool makes it possible to customize integrations so that you can support custom objects, fields, or functionality that isn't supported in a productized connector.

API Integration

If your developers already have their own integration tools or if you prefer not to rely on a third-party for building complex integrations, you can use APIs, such as REST, GraphQL, and SOAP, to integrate different systems.

APIs allow you to exchange data and perform different functions, such as importing products or synchronizing orders and accounts within your systems. They also allow your developers to create integrations faster since they can use their preferred tools instead of having to learn something new.

Bringing Everything Together

The largest insurance company in Kuwait, Gulf Insurance Group-Kuwait, wanted to improve their digital presence since their applications were siloed, leading to frustrated and confused customers as they tried to navigate dissimilar interfaces and tools.

With their new self-service customer portal, Gulf Insurance Group was able to bring everything into a single solution, so customers can easily navigate without disruption. Now customers can submit claims, request quotes, and update applications online.

Read more to see how Gulf Insurance Group was able to reduce time-to-market and their total cost of ownership with this new unifying solution [here](#).

2. Streamline Processes and Deliver Better Experiences

Once your systems are connected, you can create workflows, unlock insights, and simplify global updates to streamline processes and deliver better experiences to your customers and employees.

Automate Tasks with Workflows

Workflows enable you to simplify tasks for your customers and the employees that serve them. For example, if a customer order requires multiple approvals from their organization, you can set up a workflow that automatically routes an order to the right people for approvals. You can also use other criteria for a workflow, such as triggering an approval process when an order is over a certain value or is being shipped to a new address.

For your own teams, workflows can help ensure better accuracy and service, especially in the case of complex orders. This could be the case for complicated products that have known compatibility issues. In such a situation, you might want someone from your team to review the order to ensure it's correct before shipping. Using a workflow to make sure an order is reviewed before it's sent can save you time and reduce the costs associated with returned merchandise. It can also help you better serve your customers by providing them with the right products in a timely manner.

Accomplishing More through Automation

International insurance company, HDI Assicurazioni, wanted to deliver a modern customer experience. So with their new customer portal, clients are able to submit payments, file claims, and manage their accounts independently.

This is possible because the company was able to automate and digitalize these processes.

Read more about how HDI Assicurazioni was able to bring in over 50,000 new registrants through their new solution [here](#).

Unlock Insights to Deliver Better Experiences

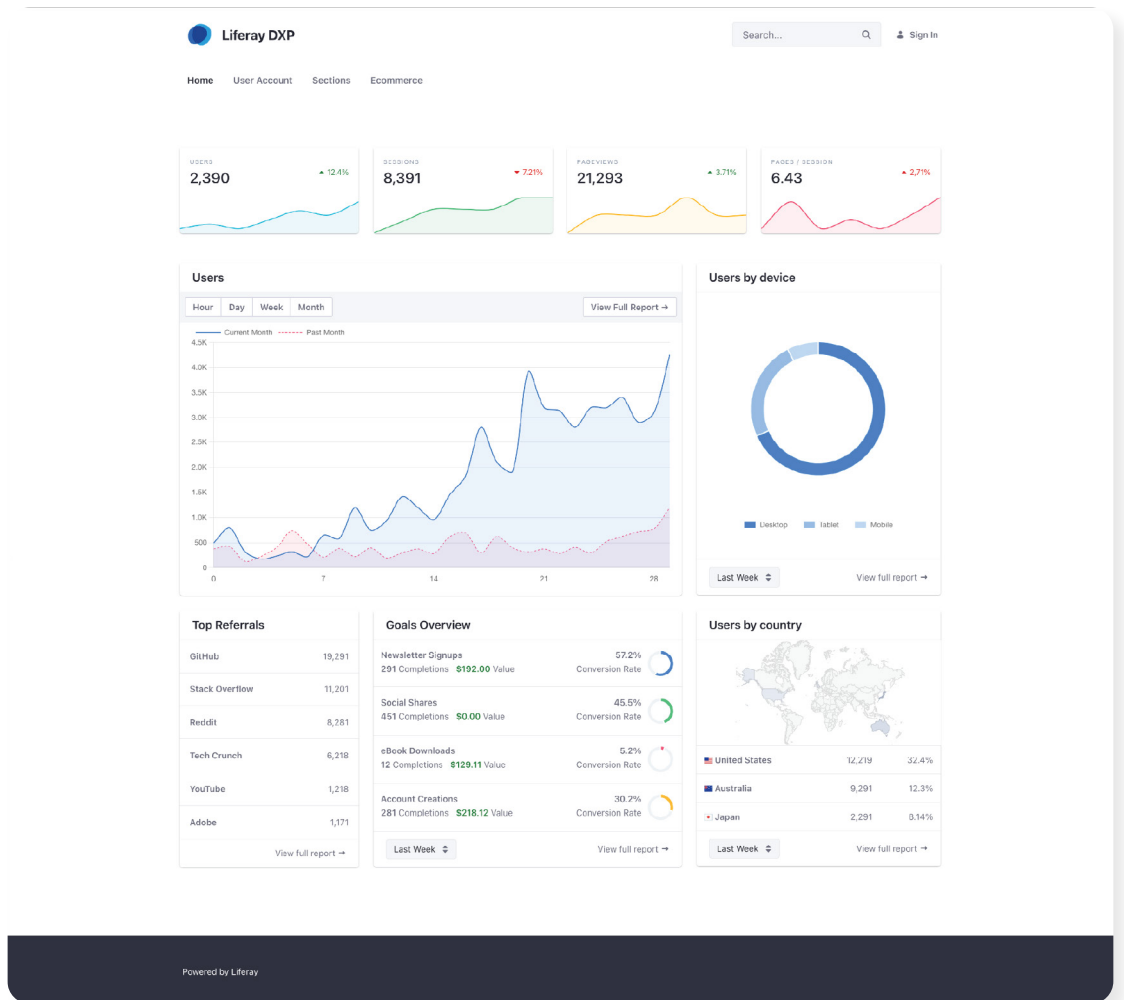
A customer portal can unify all your data in one place so you can unlock new insights that can help you deliver more value to your customers. With these new insights, you can be proactive when it comes to serving your customers as follows:

- Focus your service team's efforts on improving service to at-risk customers by cross-referencing your CRM data with your ticketing system to see whether issue resolution times impact customer spending.
- Only show customers content, tools, promotions, and other resources that are relevant to them by using CRM data to segment and personalize experiences for your users.
- Ensure you have enough inventory to meet the needs of your customers by pulling in forecast data that shows how much your customers have purchased from you historically.
- Help your customers stay on top of equipment maintenance by displaying usage data from integrated sensors.

Monitor and Validate the Information on Your Site

It's harder to track user behavior and content effectiveness if your customers are interacting with multiple sites or experiences. Connecting your systems allows you to consolidate analytics in one place so you can quickly access the following key performance metrics and determine where improvements may be needed:

- **Behavior Metrics:** Based on traffic and path analysis of your customers, you can see how they are getting to specific pages and where they commonly go. Gathering these insights can highlight how customers are navigating through the site. This information can help to streamline page paths and identify where customers are getting stuck.
- **Site Metrics:** Performance indicators such as page views, top pages, search terms and interests, and visitors by day and time can help inform what pages are most critical and which need to be updated more regularly.
- **Asset Metrics:** Seeing metrics such as number of downloads and engagement levels for different assets, including blogs, ebooks, or videos, will provide insight into what content customers find most helpful and what assets should be prioritized.



Site Metrics Overview

Airbus Helicopters Boosts Operational Efficiency

More than 3,000 civil and military operators rely on Airbus Helicopters' customer portal to keep their aircraft operational.

Aircraft operators can now see the most relevant information related to their helicopters in a personalized dashboard. From the dashboard, they can get warranty support, view their maintenance requests, and see usage reports for their helicopters – thanks to data that is collected from integrated sensors and automatically highlighted in their portal.

Learn more about Airbus Helicopters' solution [here](#).

Simplify Updates Across Systems

Not only can a customer portal be the single place to access information but also to update information and have changes automatically propagated on all other connected systems. This change could be as simple as an updated address or as complex as an order for additional products and services that relies on several systems to execute.

This benefit also applies to your staff updating internal systems. For instance, your teams can make a major update to a price book in one place and have those changes propagated across your ERP, PIM, and other systems referencing this data. Or they can update documents in a central library and have any sites that reference those documents updated automatically.

Once your systems are connected, making global updates across your organization becomes much easier and much more efficient.

Merkur Simplifies Document Maintenance

Merkur Versicherung AG is Austria's oldest insurance company and insures its customers' lives, health, and assets.

Document management was a major priority for Merkur. They wanted the ability to update and distribute documents to their various portals quickly. To achieve this goal, they centralized their documents in one place where they can be easily updated by their employees and then automatically distributed to their various sites.

You can learn more about Merkur's solution [here](#).

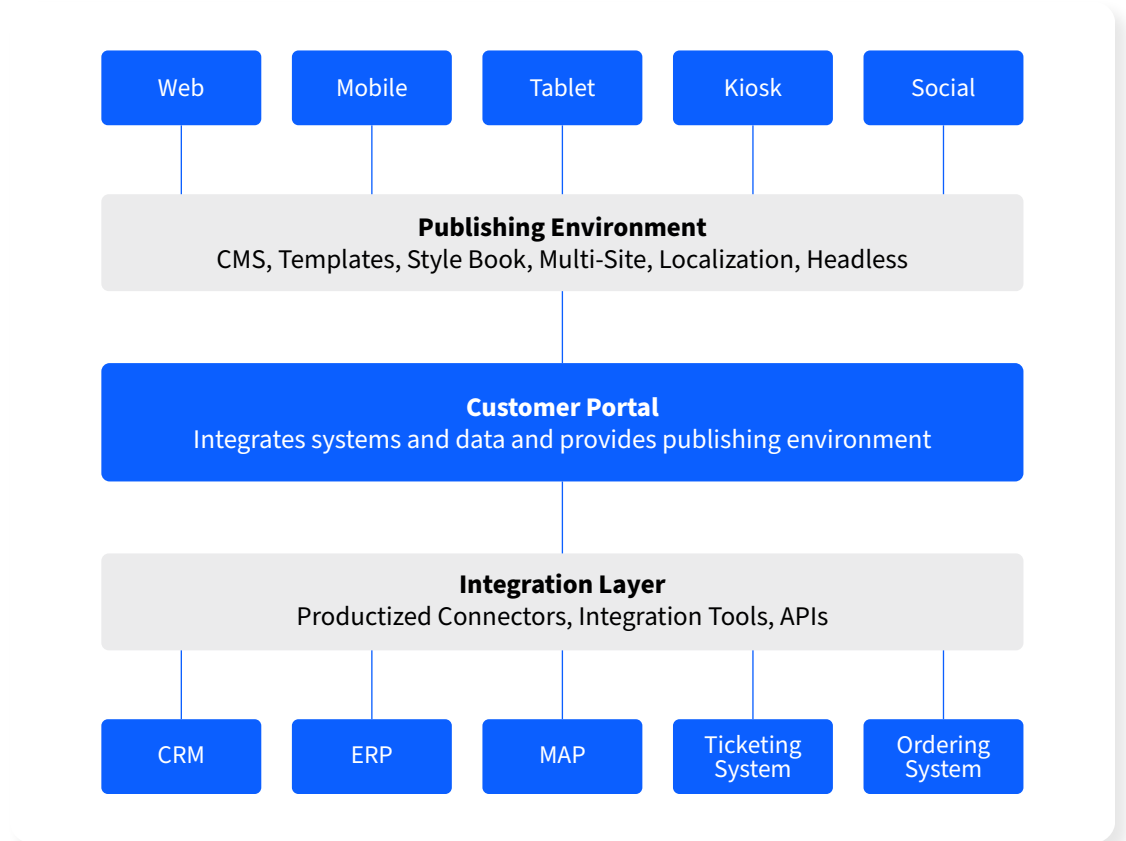
3. Deliver Consistent Brand Experiences Across Single or Multiple Sites

Whether due to a history of mergers and acquisitions or simply the proliferation of systems over time, companies can accumulate multiple digital experiences whose inconsistency may affect brand quality perception.

A customer portal with a comprehensive publishing environment can help your teams consolidate these disjointed experiences into a single unified experience with consistent branding. Or it can simplify maintaining and updating multiple branded experiences by providing a central location for your team to access and make changes to your sites.

It can also provide time-saving templates, style guides, and asset libraries to ensure design consistency and usability.

Additionally, a robust publishing environment can help you deliver digital experiences to your customers in the right language and across multiple channels and devices.



If consistency, usability, and time-to-market are important to you, here are a few of the capabilities you should consider when evaluating a customer portal solution:

Content Management System (CMS)

A content management system should give your teams everything they need to quickly update or create information pages, product pages, forms, applications, and other types of content on your portal. Your CMS should also allow authors to preview what their content and related assets will look like on different devices and automate the content approval process for quicker go-to-market.

Templates

Templates allow your teams to define exactly how your content should display to your audience on your site. You can specify what elements, such as headings, graphics, text, and banners, should appear on a page and where they should appear.

Templates should also give you the ability to apply them to your entire site or to a collection of similar content, such as articles, press releases, blog posts, and product pages.

Style Books

Style books let your teams control what the different elements in your templates should look like. For example, you can specify line spacing, fonts, button colors, border styles, page backgrounds, table attributes, and other design elements. This allows you to ensure that the look and feel of your site is consistent with your brand.

Multi-Site Management

Multi-site management tools allow your teams to create, manage, and organize multiple sites from one central location. They also make it easy to generate a site quickly from a set of pre-built templates which can be easily modified to reflect your brand(s). Additionally, administrative tools enable you to assign permissions to users or members of the site that control what they can see.

Asset Libraries

Asset libraries are virtual spaces where you can create and store reusable assets, such as graphics, documents, articles, and pages. You can use these libraries to save time and implement standards as follows:

- Re-use assets from one library on multiple sites to ensure consistency across sites
- Group together content for departments, teams, or even individual products and campaigns
- Store content and related assets in smaller, focused buckets that are easier to manage

Content Localization

For companies with customers in different countries, it's critical to have a publishing environment that supports content localization. This type of support can include visual editors that help your content team manually add translated content to your site themselves. Or it can include plugins and dynamic translation tools that allow external providers to add these translations.

Other localization features could include auto-translation, support for different time zones, or a file extraction-based translation process that enables your translation agency to extract content from your site via FTP and push it back to you in the same manner.

Headless Delivery

If it's important to make your portal and the tools and services inside your portal available on different devices and channels, you need a publishing environment that supports headless delivery. Headless APIs empower your front-end developers to deliver richer, faster, and more responsive user experiences. These digital experiences include virtual assistants, kiosks, IoT/smart devices, and a number of different social media channels.

Putzmeister Delivers Stellar Customer Experiences Globally

A world leader in construction and underground mining, Putzmeister created a dealer and customer self-service portal that serves as a unifying omni-audience platform. The platform, named MY Putzmeister, has united all online offerings and platforms under a single touchpoint that offers personalized content and data to dealers, customers, and employees.

The new solution benefits more than just end users, however: using Liferay as the central hub for content, employees can reuse content across different sites easily, simplifying a once-tedious process of adding data like product information or machine options.

Read more of Putzmeister's digital transformation story [here](#).

Delivering a Unified Customer Experience

Unifying customer experiences is not only beneficial for customers. Connecting processes, technologies, and applications together also helps increase internal efficiencies and decrease operational costs.

If your customer portal isn't properly equipped to connect disparate technologies, streamline processes, or drive consistent brand experiences, look to a solution that has been recognized for its ability to do all three: Liferay.

Liferay provides a single, unified platform that empowers businesses to tailor the solutions they need without sacrificing budget, time, or flexibility. With native content management, commerce, analytics, and cloud capabilities, Liferay makes it easy for businesses to build and connect multiple solutions, like customer portals, intranets, websites, and more.

Liferay's extensions architecture and portal heritage also make it well-suited for sophisticated B2B and B2E use cases that require challenging integrations and custom development.

With Liferay, you can build a customer portal that can easily bring together different systems and applications. And you can ensure the content, design, and usability of your site are consistent no matter how your customers access it.

See how you can unify your customer experience with a customer portal built on Liferay [here](#).

Contact our team at liferay.com/contact-sales to learn more.



Liferay helps organizations build for the future by enabling them to create, manage, and scale powerful solutions on the world's most flexible Digital Experience Platform (DXP). Trusted globally by over a thousand companies spanning multiple industries, Liferay's open-source DXP facilitates the development of marketing and commerce websites, customer portals, intranets, and more. Learn how we can use technology to change the world together at liferay.com.

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