

Maximizing Efficiency:

6 Best Practices for Manufacturing Customer Portals



Introduction

As a manufacturer, efficient processes and the right tools to support them have always been crucial for you. But recent supply chain disruptions, changing customer demands, and the pressures of inflation have underscored the importance of efficient business operations.

Disconnected Systems and Tools Lead to Inefficient Experiences

With products becoming increasingly complex and customers being more connected and empowered than ever, your customer service is undergoing rapid and sometimes disorienting change. However, if you want to offer efficient, meaningful, and seamless commerce and service experiences, your customers still need to be at the center of how your organization thinks and operates.

All the systems and tools you use along the customer journey – from inquiry and purchase to aftersales and customer service – should be connected and aligned. For example, having to search for a spare part on one system, then ordering it through another system, and then using yet another site for aftersales support creates a disjointed, inefficient, and frustrating experience.

Making matters even worse: If your online presence is difficult to update and maintain, its content can quickly become dated, making it more challenging for your customers to find what they need and further contributing to a poor user experience.

Inefficient Processes Drive up Service Costs

A disjointed and inefficient customer journey will also lead to poor and inefficient experiences for your sales and service teams, who will have to field more calls and emails. This makes it harder to provide timely and effective support and drives up your customer service costs.

Better Experiences and Reduced Costs with a Customer Portal

Offering a customer portal is a great solution to integrate your systems and tools. At the same time, a modern customer portal can provide an easy-to-use publishing environment and lets you observe customer behavior both pre- and post-purchase, helping you anticipate new needs. All of this enables you to **streamline the complex manufacturing customer journey, reduce costs, and go to market faster** with important site updates.

In this guide, we'll dive into these six customer portal building blocks for making your customers *and* your service teams more efficient:

- 1 Streamlining customer onboarding
- 2 Simplifying everyday tasks with self-service
- 3 Simplifying complex ordering workflows
- 4 Providing a unified experience
- 5 Finding answers easily and quickly
- 6 Equipping your teams with intuitive tools that help keep your portal current

1. Streamlining Customer Onboarding

In a competitive manufacturing landscape, a seamless, efficient, and hassle-free onboarding experience gives you a valuable edge. The better and faster you educate your customers on how to get the most value out of your products and services, the more likely they are to adopt and recommend them.

But onboarding new B2B customers is different from the typical B2C onboarding process. In manufacturing in particular, customer onboarding processes can vary widely because organizations have different types of customers and products that require unique onboarding experiences.

On the customer side, you might be serving users with diverse roles, interests, and experience levels. On the product side, simpler manufactured goods like building materials may only require the creation of an online account to get started, while more complex machinery like an industrial robot or an aircraft turbine may require a combination of digital and in-person training as well as meeting with someone like a customer success manager (CSM).

However, streamlining the onboarding process is not just about replicating manual processes digitally. You need to use technology to eliminate inefficiencies and deliver a better, more efficient onboarding experience.



40-60% of B2B customers abandon onboarding processes in digital channels.¹

¹ Ultimate Guide to B2B Customer Onboarding

How to Make Customer Onboarding Easier for Both Customers and Employees

Traditional customer onboarding methods often have a variety of touchpoints, such as sending out a series of emails, scheduling appointments with your CSM, referring to FAQs and knowledge base articles, or accessing community forums for knowledge exchange with existing customers. That's a lot of potential disjointed processes and systems for your customers to navigate and teams to manage.

A customer portal can help you connect all steps of this journey, making onboarding more efficient for your customers and your sales and service teams. Here's how:



Define step-by-step journeys for both online and offline interactions between you and your customer. Those journeys can be defined differently based on customer type or purchased products.



Set up automated tasks, for example, for appointments with a CSM, welcome and follow-up emails, or scheduling training.



Use personalized, curated content to guide customers through their onboarding, showing them only the training materials, tools, and services relevant to their product portfolio and aftersales requirements.



Track metrics to see where your customers are in the onboarding process, and use **auto-trigger notifications** to remind them what steps they need to take next.



For account-based customers, include a step for **adding members to their account** (including email invites for other members, setting their role and entitlements, etc.).

Learn how to maximize the value of your customer portal for both customers and employees by improving onboarding with this [whitepaper](#).

2. Simplifying Everyday Tasks with Self-Service

The overwhelming majority of B2B customers prefer digital self-service to “in-person” contact.² Giving your customers unified access to systems and features through a single customer portal experience is an obvious starting point for maximizing their ability to self-serve. Your customer portal should allow your customers to perform basic tasks, such as:

- Managing their own accounts, orders, and returns
- Accessing documentation and user community forums
- Creating and managing service tickets, for example, for warranty claims
- Setting up recurring maintenance reminders
- Registering for product trainings or scheduling demos



Today, 100% of customers want to self-educate and manage the buying experience independently (up from 87% in 2021).³

Once you have the basics in place, you can use technology to make self-service experiences more valuable, including:

- Personalizing the information, content, and actions you present to your customers based on their equipment portfolio, enabling them to self-educate on the best practices on operating their specific equipment
- Incorporating mobile devices into self-service workflows when they are more convenient (e.g., to upload photos from the factory floor or a construction site)
- Transitioning from self-service to assisted service with a chat interface that retains the context of what the customer was trying to get done and passes that information to a rep

Most importantly, by studying the behavior of customers in your portal using analytics, you can keep evolving your self-service options to deliver more value and optimize the customer journey.

See how to improve business efficiency and customer experience with self-service in this [whitepaper](#).

² Monitor Deloitte: Digitalization as a growth driver in after-sales service

³ Optimizing for the Self-Serve Buyer is Table Stakes - TrustRadius for Vendors

3. Simplifying Complex Ordering Workflows

It's no secret that your B2B customers expect their buying experiences to be at the same high level as the de facto standard of B2C. Today, you can no longer assume your customers will happily navigate to a catalog PDF in their emails, then look up product numbers in one channel, then order through a separate system. Such slow, antiquated, and inefficient ordering processes will negatively impact profits, customer satisfaction, and customer loyalty.

The same goes for the aftersales experience, where manufacturers often struggle to provide efficient customer journeys due to disparate systems, legacy technologies, and outdated processes.

A customer portal can simplify complexity by bringing data, applications, and processes together in a single solution that will reduce the cost-to-serve and ultimately make it easy for customers to do business with you.



According to a study by PwC, 73% of customers consider the ordering process an important factor in their overall experience with a company.⁴

How to Simplify Complex Ordering Workflows

An advanced customer portal solution can help you simplify complex ordering and aftersales workflows with:



Personalized catalogs: Tailor catalogs to specific customer segments or individual accounts. Digital product catalogs can store product attributes, specifications, part numbers, diagrams, and other criteria, allowing your customers to quickly search, compare, and select the right products.



Streamlined order customization: Complex ordering and aftersales workflows often involve customization options such as size, color, configuration, add-ons, or special bundles. Eliminate the need for back-and-forth communication and ensure accurate order specifications by enabling easy customization of orders through user-friendly interfaces.

⁴ Experience is everything. Get it right.



Multi-approval ordering: Overcome complex procurement processes by setting up automated workflows that allow orders to be routed to multiple approvers before they are shipped.



Volume ordering: Simplify high-volume ordering by providing bulk ordering capabilities and real-time inventory visibility through direct integration with your ERP or inventory management system.

Learn how to simplify and speed up B2B ordering for different kinds of B2B buyers in this [whitepaper](#).

4. Providing a Unified Experience

Providing a unified experience that is intuitive for customers is the chief driver for creating a customer portal. Bridging the gap between the old and the new by integrating your legacy solutions in a unified system eliminates silos, connects databases, and shortens business processes. In manufacturing, a portal can, therefore, help you drive important benefits for your company and your customers.

Make Updates and Accomplish Tasks in One Place

A customer portal can become a place to not only *access* but also *update* information in one location and have those changes automatically updated on all other connected systems. This could be a simple address change that gets updated in multiple systems, or it could be an order for additional manufactured goods and services that relies on several systems to execute.

This benefit also applies to your staff updating internal systems: Major updates to product specifications, inventory levels, or supplier information can be propagated across your ERP, PIM, PLM, WMS, SCM, etc.

Unlock Insights to Deliver Better Experiences

By bringing data together in a single place, a customer portal can also unlock new insights to help you serve your customers better. For example:

- You might be able to cross-reference your CRM data with your ticketing system, so you can see whether warranty claim processing times impact customer spending or equipment uptime. This enables your customer service teams to focus on improving service to at-risk customers.

- You can use CRM data to segment customers and personalize their customer portal experience accordingly.

Drive Consistent Experiences

Whether due to a history of mergers and acquisitions or simply the proliferation of systems over time, you, as a manufacturer, can accumulate multiple experiences with inconsistencies that may affect brand quality perception. A unified customer portal with a comprehensive publishing environment can help your teams create a single, coherent branding experience. For example, your customer portal can include time-saving templates, style guides, and asset libraries to secure design consistency.

Streamline Experiences

Finally, a unified customer portal can be a natural place to start re-defining common business processes that touch the many different systems and users brought together in the portal.

For instance, before implementing a customer portal, customers might have to go to one site to get product information, only to be taken to another site or multiple sites to complete different aftersales actions, such as ordering spare parts or consumables, entering a service ticket, or submitting a warranty claim.

At first, a customer portal can provide a single place to perform these actions separately, but over time, you can use the portal to streamline and efficiently automate the experiences along the customer journey. In the above example, your system might evolve to automatically suggest options for maintenance checks based on your equipment portfolio and recommend ordering the right spare part when a customer submits a warranty claim.



85% of customers expect cohesive experiences across departments.⁵

Learn how to unify customer experience with these 3 strategies [here](#).

⁵ State of the Connected Customer

5. Finding Answers Easily and Quickly

As discussed before, customers expect to self-serve, and this is certainly true when it comes to finding answers about your products. Fortunately, there are concrete ways you can use technology to help customers successfully navigate the many resources available to them and reduce the support burden on your staff.



63% of customers say that they are annoyed with the search field found in most portals.⁶

How to Make Answers Easy to Find



Personalized dashboards: Deliver relevant content without requiring customers to search. Consolidate your customers' equipment portfolios in one place by providing insights on past purchases and offering manuals, documentation, and service records of machinery. You can even display performance and service data through IoT telemetry.



Enable autonomous problem-solving: When a customer is about to open a service ticket, suggest existing knowledge base articles that help your customers' technicians execute maintenance tasks autonomously, preventing the need for creating that ticket.



Search tuning: If certain search terms your customers use don't match up to the keywords in your content, you can train your search engine to show the most relevant results for those terms



One search for all content sources: By connecting all systems to your customer portal, you can ensure search results include everything that might be helpful, from relevant content and blogs to manuals and data sheets.

⁶ The Value of Customer Self-Service in the Digital Age



AI-powered chat interface: Some customers prefer chat-like interactions to traditional search bars. Chatbots can use AI and natural language processing to scan your content and offer your customers what they might be looking for. A chatbot can also escalate an issue to a customer service rep if the customer is still not able to find what they need.



Customer forums: Allow customers to answer each others' questions through user community forums organized by different topics.

Read about 3 strategies you can employ to make discoverability and search easier for customers in this [whitepaper](#).

6. Equipping Your Teams with Intuitive Tools That Help Keep Your Portal Current

In the manufacturing industry, meeting customer needs is a core component of any customer portal. If your customers encounter issues with your products or services, they will naturally turn to the portal for prompt assistance and guidance.

Understanding your customers through meticulous research allows you to offer comprehensive solutions within the portal. However, it's important to recognize that customer preferences, motivations, and goals evolve over time, especially during periods of economic uncertainty and disruption.



39% of users would think twice about using a product or service if the website isn't current.⁷

⁷ 81% of People Think Less of a Business if its Website is Outdated

By implementing the right customer portal solution tailored to your business requirements, you can proactively identify changing customer needs and strategically plan improvements. The right solution can also give your teams the tools to swiftly address urgent requests, rapidly create content and applications, intuitively set up workflows, and automate critical business processes.

Such tools play a pivotal role in ensuring that your customer portal remains current and optimized, resulting in satisfied customers and a competitive edge

How to Keep Your Customer Portal Current

Keeping your customer portal up to date requires the right set of tools to measure its effectiveness and enable swift content and site updates. You'll need a purpose-built portal solution that empowers you to:



Monitor and validate the information on your site so customers receive the most up-to-date information and notifications. Reminders can automatically provide you with a report of old pages to plan updates or remove irrelevant content. For example, if you use the portal to provide documentation on highly specialized machinery, you can identify outdated documents quickly to replace them with the latest versions.



Use analytics tools to see behavior, page, and content performance and better understand what information is helpful and where customers are getting stuck. For instance, track how customers use your content on maintenance procedures (e.g., troubleshooting guides, calibration manuals) to discover common pain-points. This allows you to adjust the portal's navigation and user experience accordingly.



Use low-code tools that make it easy for any user to launch new applications, streamline workflows, and build new pages without writing a single line of code. This allows your business teams to go to market faster with changes and frees up your IT teams to work on more strategic initiatives that do require more customization and coding. You could, for instance, streamline your quality control procedures using low-code tools by building a quality control application that allows real-time tracking of product inspections, automates data entry, and generates comprehensive reports.



Provide strong out-of-the-box capabilities and templates to further accelerate time-to-market. Look for a customer portal vendor with pre-built capabilities such as content management, digital experience management, personalization, and more. For instance, create personalized product catalogs for different customer segments effortlessly by leveraging out-of-the-box personalization features that consider customer preferences, industry-specific needs, or regional variations.

Dive deep into the 3 tactics needed to keep your customer portal current [here](#).

Make the Most out of Your Customer Portal

By choosing the right customer portal platform for your manufacturing organization, you can make your customer experience more streamlined while better equipping your internal teams with more efficient tools.

Is your customer portal able to execute on the six tactics we've discussed? If not, you can build a more effective tool with Liferay.



The Complete Platform for Tailored Solutions

Liferay is a complete platform that empowers you to tailor the digital solutions you need without sacrificing speed, flexibility, or budget. By using Liferay to build your customer portal, you will be able to:

- Give customers one place to quickly perform crucial tasks on their own, such as updating their information, checking the status of an order or warranty claim, or paying an invoice.
- Unify all the systems and tools your organization owns into a single gateway that's more efficient to use and preserves investments in existing technologies.
- Empower your business users to launch tailored digital experiences faster using low-code and no-code tools.

Your customers' expectations for excellent digital experiences will only increase. Be on top of these expectations by not only delivering a customized solution for customers but also doing so more efficiently with Liferay.

See how you can leverage Liferay's out-of-the-box capabilities to build an effective [customer portal for manufacturing here](#).



Contact our sales team at liferay.com/contact-sales for more information.



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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