

Portal Best Practices

Getting the Most From Your Portal

Five Best Practices to Ensure a Successful Portal Initiative

Choosing the right technology is important, but organizational support is key. Enterprise portals have reached a level of maturity in today's software market where it is no longer the technology that inhibits return on investment. Unfortunately, many obstacles to successful solutions persist chiefly because of the cross-organizational nature of portal business objectives. Portals uniquely sit

in the intersection of multiple departments, serving the needs of diverse and often competing sponsors. The technology of portals has moved beyond hype and into a productive phase of the market cycle, so it is more critical than ever that leaders of enterprise portal initiatives emphasize organizational change as a crucial performance indicator.

Here are five best practices to keep in mind to maximize your portal investment:

Five Practices for Portal Success

1. Identify Business Ownership

Portals cross organizational boundaries and require sponsorship from the executive level.

2. Establish Governance Guidelines

Governance keeps content relevant and puts the right applications in front of the right people.

3. Fit Your Business

The most effective portals will be customized to the way your business works.

4. Think Big, Act Small

Don't attempt to meet every requirement at first. Get it out quickly and incorporate feedback into the next iteration.

5. Think Beyond Portal

Identify web initiatives that can benefit from the jump start a portal framework provides.

1. Identify business ownership and secure sponsorship at the highest level

Portals often face the danger of promising too much and delivering too little. Although technology sometimes gets in the way of delivering promised benefits, more often a lack of clear business ownership is the underlying problem. Sometimes no single department is willing to allocate budget for a portal because the benefits are seen to be cross-organizational.

Alternatively, a portal that started as a single department's efforts grows to encompass a greater scope, but the original owners find no one else is willing to take responsibility.

Both situations can be remedied by aligning portal strategies with the enterprise-wide portal vision and by securing portal sponsorship from senior management. In most cases, it makes sense to set the portal as the foundation for internet policy and strategy (including website, extranet, intranet) enterprise-wide.

2. Establish guidelines on portal governance

Getting the right content and applications in front of the right users is one of the primary goals of a portal. But without proper governance and processes, content will become outdated, redundant, irrelevant or difficult to find, potentially compromising applications security.

To avoid these situations:

- Create guidelines on creating, updating and expiring content.
- Facilitate the content creation and approval process with built-in workflow.
- Create well-defined roles for application access and approval capabilities.
- Finally, review the portal periodically for stale content and redefine roles as business realities evolve.

When choosing a portal framework, it is important to understand what capacities are provided for assigning access rights, managing and assigning roles, and creating workflow processes. Capability and ease of use in these areas are key considerations to take to your vendor.

3. Develop a portal that fits your business

Portals are unique in that they exist at the intersection of infrastructure and application software. Good vendors will provide some level of functionality out of the box, but ultimately a portal will only be effective if it is properly integrated into the wider enterprise. This means both back-end application integration and business process integration. It also means customizing the portal to fit the way your people work.

Open source software provides unique benefits to this end:

- Its lower cost of acquisition means budgets can be more effectively allocated toward customization.
- Access to source code allows you to “fit” the software to your business in a way proprietary software cannot.

Of course, finding a commercial open source vendor to provide support, indemnity and ongoing development is key to mitigating risk. On the other hand, only open source software allows enterprises to avoid the risk of being tied to a vendor’s software release cycle, which may lead to tremendous opportunity cost in today’s quickly-moving market.

4. Make a quick first deployment, then evolve your portal horizontally and vertically

Enterprises often make the mistake of taking a “big bang” approach to portal deployment. Lengthy phases of requirements definition, development, testing and deployment lead to a portal that is over budget and out of touch with what users really need.

Because user adoption and productivity are at the heart of portal success, an iterative approach to portal deployment is recommended to ensure relevance. Get the first version of your enterprise portal in front of users quickly, and immediately incorporate their feedback into subsequent rollouts. This will ensure that users are getting what they want and will continue to come back to the portal on a daily basis.

Another healthy practice is to deploy horizontally across all business units and iterate over them evenly. Allowing a single department to dominate the portal's initial stages will skew the portal's “DNA” unevenly toward their perspective on the business, and the portal will be at risk of being pigeonholed and abandoned by other stakeholders. Even development across business units keeps owners invested and the portal relevant.

5. Think Beyond the Portal

These days, the best portal offerings provide much more than a simple integration framework for aggregating content and applications. In fact, with sophisticated user management, directory integration, and built-in content management and collaboration capabilities, a good portal can serve as the foundation for almost any web-based application use case.

E-commerce websites, for example, typically display relevant or related products to a user, who can log in to the site and view a personalized version with their account information and order history. Though this is an external facing application, the portal can be used as the foundation for the site, especially if extensive back-end integration with payment systems, logistics and fulfillment, supply chain, billing and CRM systems already exists. Re-use is a cornerstone of SOA best practices.

Integrating web initiatives with an enterprise-wide portal strategy can reap benefits in maintainability, reduced infrastructure cost, ease of development and a unified experience for all audiences that interact with your business.

In Conclusion

Invest Wisely

Now more than ever, portal platforms are ready to deliver the promises first envisioned by the market in the early part of this decade. But as with any technology, portals are simply tools to be used toward achieving an enterprise's business goals. Used properly, an enterprise portal will become an indispensable part of your infrastructure, touching every part of the business and allowing customers, partners and employees to interact more efficiently and personally. It is crucial that today's enterprises keep up with increasing demands for immediate, personalized and collaborative interactions in business environment. With a strong commitment to organizational change and the right technical tools, enterprises can stay ahead of their competitors in providing the best service possible to their customers.

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