



**Improving business productivity and  
client satisfaction with customer and  
partner self-service portals.**

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**Contents**

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- 2 Introduction**
- 2 Why aren't we there yet?  
Pressures facing your business  
in implementing a portal**
- 3 And then there's IT: building  
and administrating a customer  
portal**
- 4 Characteristics of an effective  
self-service portal**
- 5 How IBM solutions can help  
your business create an  
effective customer portal**
- 12 Why IBM?**

**Introduction**

Self-service portals for customers, partners and suppliers are becoming the business norm – for good reason. In a fiercely competitive marketplace, both business-to-consumer (B2C) and business-to-business (B2B) portals can help build client and partner loyalty, improve customer satisfaction, speed and enhance service, reduce customer support costs and generate significant revenue. When designed and deployed effectively, customer, partner and supplier self-service portals can potentially save a company as much as 15 to 30 percent by redirecting contacts, reducing call volumes and automating assistance.

Portals have become more than just a convenience – for most businesses, they are a strategic imperative and can propel an organization's growth and reputation to new levels.

**Why aren't we there yet? Pressures facing your business in implementing a portal**

When it comes to providing portals to customers, partners and suppliers, businesses face several challenges. Consumers demand more – and know more about the level of service now possible with online capabilities. Users expect their relationship online and offline with an organization or retailer to be seamless. They want accurate information delivered to them quickly, so they can make better, more informed decisions.

Realizing the risk of alienating customers and unsure of how to create a positive experience, many businesses are tentative about launching a self-service portal.

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Highlights

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***IT departments face many challenges in building and administering customer self-service portals, satisfying internal and external users, reducing costs, ensuring security and maintaining accurate data across multiple systems and applications.***

**And then there's IT: building and administering a customer portal**

The IT department bears the ultimate responsibility of delivering the right solution to users. In many cases, this is easier said than done. As a result of growth, changing technologies and mergers and acquisitions, many organizations are left with jumbled infrastructures – a mix of systems and applications that were not designed to work together. Because these systems often are involved in critical business processes and store vital information, they must be smoothly integrated and aggregated for a portal to be effective.

Against this background of multiple siloed applications, IT staff can find it difficult to:

- ***Respond to and satisfy business needs quickly.*** IT staff must deploy solutions that scale to the needs of both internal and external users, and that can adapt and integrate new functions quickly into an existing portal environment.
- ***Reduce the cost, administration and management burdens of applications.*** IT departments need to create a common infrastructure that makes it easier and faster to deploy future B2B and B2C portals.
- ***Ensure secure access to back-end systems.*** If a portal is going to provide federated access to information regardless of location, IT systems must be sufficiently secure, for example, exposing certain kinds of data to customers but not revealing other sensitive content.
- ***Maintain accurate, current data and integrate heterogeneous information.*** IT departments must work to manage conflicting or duplicate data across multiple systems and applications. If there are data errors, it is crucial to correct them before they are exposed in business processes at a self-service portal.

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Highlights

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***From a user's perspective, a self-service portal must be usable and efficient, offer fast access to consistent information and include advanced search capabilities.***

***IT departments also want self-service portals that users will embrace, because effective customer portals streamline business and significantly lower operating costs.***

### **Characteristics of an effective self-service portal**

When it comes to the ideal B2C or B2B self-service portal, users and IT staff have some different priorities.

Users want information and community

From the user's perspective, an effective self-service portal must be usable. It must be efficient and provide services that the user needs. If a portal is not embraced by users, it can be a costly experiment. An effective portal gives users access to information from many sources with single sign-on capability. Information across all accounts, such as address and account numbers, should be consistent and easy to update, and should quickly reflect any user changes. Advanced search capabilities should make finding information easy. Many portals have support for e-commerce activity, but a portal can also simply provide fast access to information and forms.

Modern portals must be interactive and give users a sense of community. Users want to interact and participate with other members of the community, ideally through Web 2.0 features such as Web logs (blogs) and wikis, to express opinions or provide feedback for the business.

The IT department wants security and lower costs

From an IT perspective, the ideal self-service portal is one that customers will embrace and use. Not only does effective customer self-service streamline business, but broad adoption of a portal can significantly lower operating costs for IT departments. A portal must also be secure, protecting all data and information. A portal ideally provides different security levels among users and gives users access to integrated, cleansed information from different sources, corraling all pertinent information into one easy-to-use interface.

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**Highlights**

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***IBM provides a range of solutions that can help your IT team develop and deploy useful, full-featured customer portals, quickly and cost-effectively.***

For IT departments, the ideal portal is one that integrates easily with back-end systems. Simple integration speeds time to deployment, reduces administration and management costs and makes it easier to adapt and scale the portal as business needs change.

**How IBM solutions can help your business create an effective customer portal**

With these challenges in mind, IBM provides a range of solutions that can help your IT team quickly develop and deploy easy-to-use extranet portals that give customers, partners and suppliers access to the data, content and processes they need, regardless of where those components reside on the back end. IT employees can more quickly and cost-effectively deploy portals based on IBM solutions—and with less risk to security. IBM solutions deliver prebuilt services for managing important master information across applications, which makes portal administration easier than ever.

A number of IBM software applications support the creation of effective customer self-service portals.

**IBM WebSphere Portal software**

IBM WebSphere® Portal software provides the foundation for developing and deploying a customer self-service portal. Users gain a personalized, single point of integrated access to people, information and business applications.

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Highlights

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**IBM WebSphere Portal software enables IT managers to deploy business processes and critical applications quickly and effectively, lower IT infrastructure costs and improve access to relevant business information.**

With WebSphere Portal software, IT managers can:

- **Deploy business processes and critical applications quickly and cost-effectively.** The core portal platform, with an open, service-oriented architecture and rich support for Web 2.0 technologies, can help shorten deployment time, improve performance and develop highly interactive, desktop-like composite applications. Flexible, solution-specific business accelerators, such as the IBM® Content Accelerator or the IBM® Dashboard Accelerator offerings, dramatically speed time to deployment for these capabilities. And the IBM Portlet for Google Gadgets, one of the thousands of configurable components in the WebSphere Portal Business Solutions Catalog, enables developers to deploy more than 4,000 Google gadgets to a company's portal.
- **Lower IT infrastructure management costs.** Implementing all portal solutions with WebSphere Portal software provides a simple, consistent platform with infrastructure efficiencies including common functionality, management and administrative processes, and support for time-saving templates and reusable components.
- **Improve access to relevant business information, when and where it is needed.** Because WebSphere Portal software is role based, it helps you deliver the right content and applications to the right people. And with single sign-on capability, users have security-rich access to several integrated applications from a single location.

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***For extended capability, IBM WebSphere Portal software also integrates with other IBM solutions such as IBM WebSphere Process Server software, the prebuilt IBM Collaboration Accelerator offering, IBM Lotus Forms software and IBM Lotus ActiveInsight software.***

- ***Deliver real-time business process management.*** Your IT staff can use portlets and composite applications to streamline customer business processes. In addition, FileNet® Business Process Manager and IBM WebSphere Process Server software integrate with WebSphere Portal software to deliver business process capabilities such as order processing and tracking and inventory fulfillment.
- ***Enable better collaboration and communication through support for Web 2.0 capabilities.*** WebSphere Portal software transforms customer self-service into an interactive user experience, with support for blogs, wikis and other Web-based communication forums. IT developers can easily add collaboration features onto a WebSphere Portal solution with the prebuilt IBM® Collaboration Accelerator offering, which quickly integrates tools including IBM Lotus® Sametime® 7.5, IBM Lotus Connections and IBM Lotus Quickr™ software.
- ***Add on useful features in response to business needs.*** WebSphere Portal software works seamlessly with other Lotus applications to deliver the features that users want to see in portals. Your IT team can enable instant access to electronic forms with the help of IBM Lotus Forms software and can deliver business dashboards and scorecards with pertinent customer information with IBM Lotus ActiveInsight™ software.

Consider an example. Prudential Financial, a large insurance and financial services company, needed to improve customer service while lowering operational costs. With the help of IBM and WebSphere Portal software, the company developed an integrated Web portal in just five months that merged real-time account access with insurance product information and planning services.

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### Highlights

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***With an IBM WebSphere Portal solution, Prudential Financial reduced call-center volumes by 23 percent, increased Web site traffic to 300,000 registered users and enabled customers to download nearly 155,000 mutual fund statements.***

***IBM WebSphere Commerce software uses advanced Web 2.0 capabilities to deliver a natural, personalized shopping experience for customers.***

As a result, Prudential lowered call-center costs, with a 23 percent year-on-year reduction in call volumes; increased Web site traffic to include 300,000 registered users, with 400 new registrations and 8,000 unique visits a day; saw 15 percent of exchanges and 5 percent of redemptions processed online; and enabled customers to download nearly 155,000 mutual fund statements since the portal's inception. "Insurance customers are enjoying a much richer experience with Prudential," says David Kennington, Vice President of Information Systems at Prudential. "They can tap into an array of information resources to plan their finances."

IBM WebSphere Commerce software

For customer portals focused on retail and sales, IBM WebSphere Commerce software provides a rich customer experience across multiple channels and devices enabling online retailers to:

- ***Revolutionize*** the customer experience with dynamic Web 2.0 interfaces and precision marketing.
- ***Deliver*** high performance processes and productivity tools that make online shopping easy and convenient.
- ***Enable*** customers to seamlessly traverse channels doing business when, where and how they want.
- ***Integrate*** back-end resources quickly and easily.

WebSphere Commerce software applies contextual marketing, sales and order processes across all channels including the Web, call center, mobile devices and in store. Advanced Web 2.0 capabilities deliver a natural shopping experience that keeps customers on the path to purchase, while accommodating different buying styles, motivations and criteria. These capabilities have consistently helped enable WebSphere Commerce software's online retailers to optimize cart size, conversion rates and customer loyalty.



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Highlights

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***Customer self-service portals can deliver electronic forms and drive forms-based processes with IBM Lotus Forms software.***

Staples, the world's largest supplier of office products, was looking for new ways to interact with customers and create a unique retail experience built around the needs of the customer. The company deployed WebSphere Commerce software for its B2C and B2B businesses. By leveraging WebSphere Commerce software's advanced online marketing and merchandising and order capture processes, Staples drastically simplified the buying process. As a result, conversion rates increased by 60 percent, and Staples captured as many as 9,000 orders per hour (or 2.5 transactions per second) with no adverse impact on performance or reliability.

IBM Lotus Forms software

Lotus Forms electronic forms software enables IT staff to streamline customer processes by quickly building powerful portal applications, rendering electronic versions of paper forms and simplifying complex forms. With Lotus Forms software, your customer self-service portal can be used to deliver forms and drive forms-based processes electronically. For many industries, such as financial services, healthcare and insurance, every processed form adds revenue. When customers can complete and submit forms online, it benefits your bottom line.

With Lotus Forms software, IT managers can:

- *Deploy electronic forms with prepopulated fields, enabling customers to complete forms with fewer errors.*
- *Speed IT development with a platform based on the open source Eclipse technology framework. Within the Eclipse platform, developers can share assets, consolidate application maintenance efforts and write less low-level code, which helps improve productivity and lower costs.*

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***The province of Nova Scotia used IBM Lotus Forms software to reduce land-record transaction time from seven days to just one business day.***

***IBM OmniFind Discovery Edition software has add-on modules, such as the Commerce Module, that enhance B2B and B2C self-service portal solutions.***

As an example, the Land and Property Programs, Corporate Registries of Service Nova Scotia had an electronic database of land records, but manually recorded transactions in the database. The agency needed to minimize paper transactions to help citizens and businesses buy and sell land more quickly. Using Lotus Forms software, the agency developed online electronic transaction forms, prepopulated with basic property data. The online forms system has reduced transaction time from as many as seven days to just one business day and considerably reduced manual errors.

IBM OmniFind software

IBM OmniFind™ Discovery Edition software provides scalable and secure enterprise search capabilities to self-service portals, including advanced search features and prebuilt integrations to more than 25 enterprise sources. OmniFind Discovery Edition software has two add-on modules that are particularly useful for B2B and B2C self-service solutions.

The Commerce Module for OmniFind Discovery Edition software helps online retail and catalogue companies convert shoppers into buyers by making it easy for people to find the products and services that best match their specific needs.

For example, Campmor, an outdoor specialty equipment retailer, noticed that the rate of repeat visitors to its Web site had tapered off. The retailer needed a comprehensive search solution to help improve customer service, increase conversion rates and enhance overall sales. Campmor implemented the Commerce Module for OmniFind Discovery Edition software to its WebSphere Commerce solution and increased revenue derived from online searches by 64 percent after the first six months. Since then, the click-through rate has risen by 9 percent, and the average order size for search orders is 14 percent higher than orders that are not initiated by a search. “IBM Commerce Module for OmniFind Discovery Edition [software] delivers the best end-user experience by synthesizing the seeker’s request, translating it into an effective response and organizing the information returned in a manner that makes it easy for our customers to act,” says Campmor CEO Daniel Jarashow.

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## Highlights

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***The IBM Self-Service Module for OmniFind Discovery Edition software helps portal users make effective business decisions with sophisticated query processing, proactive guidance along with search results and security-rich, native access to enterprise content repositories.***

IBM Self-Service Module for OmniFind Discovery Edition software helps organizations increase portal adoption and reduce customer service costs. This software makes it easy to tap into disparate information available across intranets, extranets and corporate portals to answer questions and make effective business decisions. OmniFind Discovery Edition software:

- *Combines an understanding of both user intent and application context to return relevant information to users. For example, the query “what is a Roth IRA” will return a definition, while the query “loan” will be filtered against the customer’s account information.*
- *Guides the discovery process by presenting answers, navigational refinement options and proactive guidance in a format that helps people take action.*
- *Enables business managers to continually enhance the self-service experience without imposing additional demands on IT developers.*
- *Provides native access to dozens of enterprise content repositories without compromising security.*
- *Offers prepackaged industry vocabularies, configuration logic and application user interfaces (including portlets for WebSphere Portal software) to speed implementation time.*

Micrel, Inc., a leading manufacturer of integrated circuit solutions, was receiving customer complaints about its portal and search capabilities. The company needed to quickly improve response time and relevancy of information delivered before losing proposal opportunities and customers. Less than three weeks after implementing the Self-Service Module for OmniFind Discovery Edition software, Micrel saw a 300 percent increase in portal usage, a 25 percent increase in retention rate of new site visitors and a cost savings of US\$40,000 a year.



## Why IBM?

IBM understands that businesses need solutions that improve customer service and enable customers to gain access to the information and processes they need. These solutions must be easy to use, easy to implement and compatible with existing IT applications. As a leader in portal technology with several award-winning solutions, IBM knows how to make self-service work for customers and business partners. IBM customers can take advantage of extensive experience implementing self-service solutions and developing best practices and processes for these solutions. IBM offers comprehensive online self-service solutions designed to address business, IT and end user needs. The company has a long-term, multimillion dollar commitment to developing portal solutions and a proven track record of thought leadership and business innovation.

## For more information

To learn more about IBM customer self-service portal solutions, please contact your local IBM representative or IBM Business Partner, or visit:

[ibm.com/websphere/portal](http://ibm.com/websphere/portal)

[ibm.com/websphere/commerce](http://ibm.com/websphere/commerce)

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