

# Harnessing

# Customer Services

**Customer  
Convenience and  
Automation for  
Better Relationships  
with Customer  
Portal**





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# Customer Convenience and Automation for Customer Relationships with Customer Portal

## Some Major Facts and Figures

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- 1** By 2020, the customers will manage their relationships with an enterprise without interacting with a human.
- 2** Americans will spend 9% more with companies that provide excellent service as per the American Express study.
- 3** By 2017, 50% of product investment projects will be redirected to customer experience innovations.
- 4** 90% of consumers said they have had poor experiences seeking customer support on mobile.
- 5** In the old world, you devoted 30% of your time to building a great service and 70% of your time to shouting about it. In the new world, that inverts.”, as quoted by Jeff Bezos – CEO of Amazon.
- 6** AmeriaIn the Customer Service Trends Handbook published by Microsoft, “90% of consumers say they expect consistency and continuity from a brand across channels.cans will spend 9% more with companies that provide excellent service as per the American Express study.

# Adoption of On-demand Services: Taking CRM Software to the Next Level

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Handling customers is a complicated affair and involves numerous factors. Different levels, roles, and processes are needed to run a good relationship with customers. But technology solves this complicity making it easy for them to manage such affairs. Out of numerous business tools, the most effective, productive and promising tool used to handle customer relationships is CRM.

CRM applications are helping enterprises to streamline their customer relationship exercise and drive them in a progressive direction. It sets up a well-designed process to interact with the customers, process their data between various departments and manage their involvement with the organization. This is how CRM operates for small to large scale enterprises. But all its features fall short when it comes to manage real time needs and engagement of users. CRM application alone cannot manage everything that customers look forward to. It creates the demand for a solution that works as an on-demand service providing product that takes your CRM application to the next level.

## Challenges That Enterprises Face Without Customer Portal:

### 1. Poor Attention to Customers

The best practice of the features that highlight Enterprises have numerous clients and customers. Managing their mass requests, complaints and queries is a tough task on CRMs and ultra difficult with their physical visits. In such scenarios, enterprises often miss out some requests, or lose crucial data while sharing in the interdepartmental web and not be able to give enough attention to the customers.

### 2. Spend More Time on Phones, Emails and on the Field

The most time taking part of the customer relationship practice is, managing customer requests over the calls. Employees also have to check numerous email threads that carries customers' needs and respond to them. And when required, they also have to visit customers or vice versa customers visit offices and employees have to engage with them to fulfill their needs. All these emails, calls and meetings consume a lot of time of businesses.

### 3. People do not always want to deal with People

According to Forbes, millennials prefer digital, streamlined and mobile-friendly assistance. If there can't be digital support or it is lacking, they'll take assistance from people. They prefer more to manage everything through technology and stay away from the hassles of face to face interactions. So when when they opt any services, they have to deal with the employees even if they don't want that.





Help Customers to Optimize  
the Internet Capability and  
Lead a Productive Involvement into Organizations.

# Where Does Customer Portal Become a Necessity?

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## Make Customers Manage Their Relationships

To manage a good relationship with users, businesses are relying more on Customer relationship Management tools. These tools help them to explore all the edges of their customer engagements, from getting the opportunity and prospecting the lead, to managing their after-tracking details. Within all the faucets of a CRM software, there are functionalities available to accelerate the the business processing while making it productive and dynamic.

But these features accelerate only at the enterprise end and excludes customer. The exclusion results into a slow process in the customers relationship activities where customers are involved. Parallel to this, a customer portal also gives convenience, ease to use services and get a good customer experience.

With general CRM functionality, only employees and sales team hold the control. This control entitles them with a responsibility to resolve each and every single request and query of customers by their own. Customer portal is a tool that gives necessary controls to customers and help them to manage most of their queries by their own. It allows them to manage everything that they want by their own and anytime they want.

## Automation with Customer Portal

On the flip side of this, it also has a drawback as it lacks automation. A CRM application runs most of the work digitally and automizes your operations up to a certain level, where information is automatically shared with other department, communication drafts are automatically sent to your customers and majority of the tasks are managed with auto generate emails as well as alerts.

In such automated work environment, where everything is managed online by CRM, it becomes a bit unreasonable if you do not involve customers with the automated information sharing. With certain limitations, you can also not provide access of the CRM to all your customers. Thus, it leads you to manage your customer relationships activities without much of their involvement in the CRM. Here it creates a need for customers to visit the office, which takes your process offtrack from being completely automated and creates a demand for you to put hands on to manual activities.



## Allow Customer to Engage with You Anytime Anywhere

As businesses are managing their operation with Millennials, it is much required that they must operate in their way. Today customers wish to manage everything from their gadgets and smart devices, anytime they want. Most of them might not want to visit offices and adhere to their timings. Customer portal can help enterprises to meet such comfort centric requirements with utmost convenience.

A portal will allow them to access all their information from their home, office or from wherever they want. Whether they have some grievance or they want to submit a request, a few clicks can help them to convey their message. Most of the information that customers need, stays available for them right on the portal, which prevent the loads of requests and also allow customers to access these crucially useful information. In other ways, this also can be termed that customer portal is the most handy tool for enterprises to keep their information available all the time.

## Online Assistance for Customers

It is a common scenario for businesses, especially for service providers to see that their customers get stuck somewhere and need their help. In such circumstances, customer portal has all the knowledge base, live demos and tutorials that can help them. Save the need sales team to make support visits. Though these information is available via other source too, the major benefit of sharing this information through customer portal is the human assistance. As customer portal works as a dedicated support for your customers and has addition tools merged with these knowledge base like video, tutorial, chat support and umpteen others.

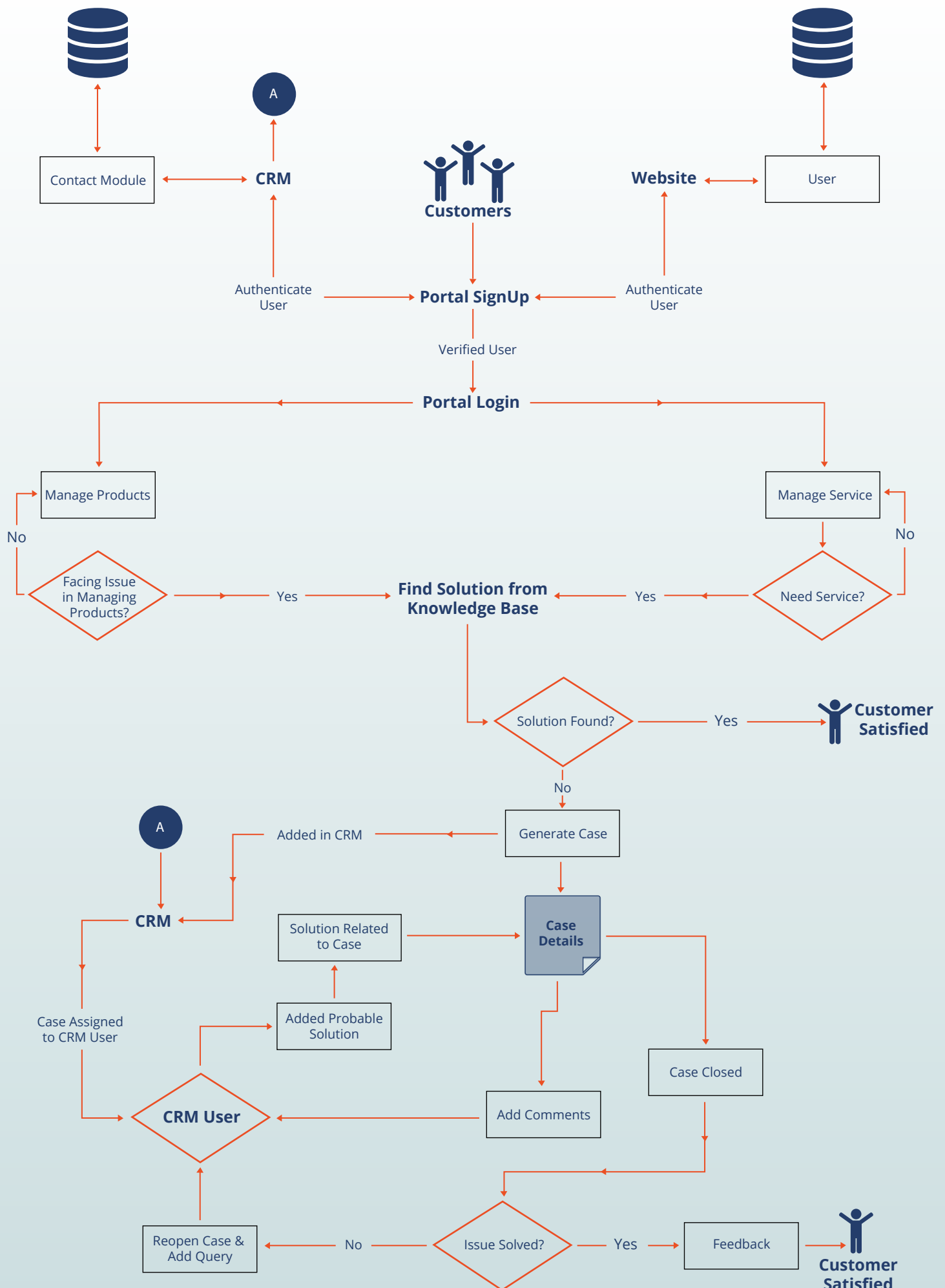
This way your knowledge base becomes more comprehensive to the customers and helps them in real time. Customer portals also comes with chat support tool that works with human assistance and with bots too. The chat tools are available round the clock and helps customers to find solutions 24\*7. Portal also saves the chat history that will help users to refer to their previous issues and find resolution without making new inquiry for the same problem.

## Exemplifying the Process

For example, an organization from banking industry is managing, sharing and processing every single information about their customers on a CRM's centralized digital platform. CRM sends the emails, reminders, reports, alerts and manage every activity by its own. All the employees and departments access the information from the CRM. But when there is no separate solution for customers, it makes it difficult to manage such self adhere practices with them. In such process, customers have to visit offices, make calls and email to reach the bank.

But when they are operating through a customer portal, the process becomes easier for customers as well as for bank officials. Customer would be able to communicate with the bank through the customer portal and raise tickets for their queries, request or any other customership activity. On the other end, banks officials can add the can address these tickets directly through the portal and resolve them by taking required action. With an easy process, a customer portal also help you to expedite your customer services with real time response facility.





# Here, **Major Points** Where Portal Helps Customers

1. Customers do not have to visit the bank and manage most of the things directly from anywhere.
2. Customers can access the knowledge base available on the portal to find crucial information.
3. Easy access to all their details, account status and other information that are useful for them.
4. The customer portal offers real time resolution of customers requests, queries and complaints.

# Here, **Major Points** Customer Portal Helps Employees

1. Employees can send notification and alerts to the customers for their dues and other schedules.
2. Address customer requests, queries and requests in real time and resolve them at quickest.
3. Store all the data related to the customers on the portal and eliminate the need of request repetition.
4. Save and share all the customer details on the portal to make it available for customers.

## Leaving Behind “Between the Office Hours Approach”

In this fast paced era of digitization and automation, almost every customer would like to get things done without the hassles of office visits. Garner survey indicates that by 2020, 85% of customers would like to manage their relationships with organizations without any human involvement. This figure refers their will to step over the traditional “between the office hours” and opt for the digital sources through which, they can drive their relationship on their own.

Customer portal works as a new operational system for an organization. It automates everything and helps customers to get resolution of their complex needs with ticketing system. Customers can put their concerns and requirements on their service providers table without visiting their office or without calling a sales person. They can simply send their request over the portal by raising a ticket.

## The Streamlined Customer Lifecycle in CRM

Ideally, a customer portal solution enables the customer relationship to be modeled as a seamless, end-to-end business process. It supports the entire customer lifecycle within an enterprise, beginning with the capture and management of contact data. The second stage involves determining the value of a customer and maximizing customer potential. Creating, adding to and analyzing customer profiles enables the business to understand better what makes customers “tick” and makes it easier to identify new ways of addressing and serving them better. The software draws together all information about a customer and its relationship with the company. All departments—including those with no direct contact with customers -- can then access the information of relevance to them in a suitable form.

# Reasons to Have a Customer Portal

### Gives More Control to Your Customer to Drive Their Relationships with You

The old traditional approach of “Between the office hours” does not really work. One of the most crucial role that a customer portal plays for you is self service facility that it allows customers to help their own self. Whether they want to update their information, official requirements, queries or simply wish to access their previous engagements, the customer portal has all such information available within a few click. This eliminates the need of visiting office for customer to visit the office.

### Focuses Your Manpower in Other Productive Engagements

A customer portal has the ability to take away a lot of work as well as burdens from your manpower. As it can manage most of the customer relationship exercises, it can reduce the demand of customer service and lessens the workload of a sales team. This saves time and efforts of your workforce and allows them to focus more on other productive engagements. It will also help enterprises to reduce their operational costs while accelerating the business process.

### Lower Load on Customer Support Team

A survey from Support Industry says that self service customer portal reduces customer support team load by 15%. Availability of information on the portal eliminates the need for customers to send emails or make calls for their queries. They can simply log into the system and find the solution they are looking for. Knowledge base of a customer portal can store information in all formats, from videos to audios and pdfs to MS doc file.

## More Work, Less Manpower

A customer portal minimize the effort requirement and helps enterprises to manage more work with less manpower. These portals drive an automated work process to handle customer requirements, which reduces the load of your sales and customer support team. Thus, this manpower can be focused to some other progressive strategies to push the business limits. Customer portal not just cuts down the effort needs, but also works round the clock without any error. Such work efficiency with sustainability and consistency is unfair to expect from your sales team with these kinds of tools.

## Customer Satisfaction

The best feature about the customer portal is that, it helps customers more than it helps business. All of its features are centred around the customer convenience and efforts towards making them happy with services. When customers are empowered to manage everything on their own through a self service portal, it makes them happy and also encourages them to recommend the services to others.

# Customer Portal Brings Future Prospective to Businesses

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## Analytics Powered Budgeting and Yearly Planning

Customer portals come with analytics about business processing. They also save records of all your engagements with customers. Both of these data play a crucial role in understanding your business requirements and customer needs. This knowledge base assists organizations to analyze their today and plan tomorrow. While thinking expansion scope, yearly budget and other future prospects, these features plays crucial role for organizations.

## Opens the way to develop a Mobile App and Gives an Established Base

The features of a customer portal give you an excellent starting point from where you can look for and push forward to a mobile application. A customer portal has all your business features and the functionality that suffice your need. This way, it works as a blueprint for you to fit all the features and functionalities in a smartphone application and enlists all these features into that. As mobile apps are crucial in taking your business to the next level, a well established customer portal makes it easy to give it highly productive features and usable attributes.



# Customer Portal Functionality Checklist

Many goals of self-service customer portal functionalities include allowing greater productivity opportunities for the business user and improved IT department efficiency. It also help them in reducing some of the costs associated with providing IT services. In order to achieve maximum efficiency, the following self-service functionality should be available in a customer portals are:

- 1 Standard and configurable request forms, metrics/dashboards, processes, interface, and navigation
- 2 Tracking and status updates via the web and email
- 3 FAQs and configurable knowledge base that answers common questions
- 4 Communication on service additions or changes
- 5 Self-service password reset or recovery
- 6 “How-to” tutorials or videos for self-discovered solutions
- 7 Engaging and intuitive interfaces/navigation for ease of use
- 8 Mobile or multi-device accessibility
- 9 Business intelligence and analytics
- 10 Chat, forums, social capabilities, and communication tools
- 11 Searchability
- 12 Intuitive interface design
- 13 One-click requests
- 14 Ability to automatically identify user and equipment

# Some Handy Tips to Design and Develop the Perfect Customer Portal

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- 1 Understand the demands and needs of your customers
- 2 Gather feedback from users on what they would like to accomplish using an IT self-service portal
- 3 Test out a small group of services with a sub-set of end-users
- 4 Continuously moderate, review, and improve
- 5 Maintain updated and relevant knowledge base content using the Knowledge Centered Support
- 6 Market and encourage portal usage
- 7 Gain leadership support to promote usage
- 8 Brand the portal with business logo and colors
- 9 Avoid technical jargon
- 10 Consider integrated tools, such as Active Directory for easy access

## Case Study on Customer Portal

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### Customer

The customer was a newly licensed commercial health maintenance organization based in Northern California. The company was affiliated with one of the nation's leading healthcare networks. With a strong customer base of 15,000 lives that was covered by health insurance products, the company is expected to have a very high growth potential.

## Need

The company was facing challenges in managing its existing portals pertaining to area such as member, employer, broker and provider. These portals were old and the customer had to spend significant amount of time and money on feature enhancement and customization. The performance and integration of these portals with other existing applications of the organization was therefore a cause for concern. The customer wanted to upgrade the portals into customer centric interactive ones that are equipped with self-service capacities and state of the art features. This would help them to enhance their customer satisfaction and also reduce the number of calls made to the customer service.

## Solution

The ITC Infotech team executed a cloud based portal rich in self-service features to enhance customer experience. Features and technologies were implemented after evaluating their potential contribution to the expected business growth of the organization. The responsive design of the portals helped extend usability to any mobile device with option to extend the portals as a standalone mobile app.

The tools and technologies used for upgrading these portals included HTML5, CSS, C#, ASP .NET MVC, AngularJS, JQuery and HealthRules. The project was executed on the onsite offshore model and followed a phased development timeline. The implementation phase was followed by production support and enhancements

## Business Benefits

The solution helped the customer in multiple ways:

- 1.** The self-service features on the portals ensured excellent customer experience which automatically reduced the number of customer service calls.
- 2.** The responsive designs of the portals ensured that the portals were easily accessible via smartphones.
- 3.** The portals were upgraded with performance centric design and were scalable for future expansion.

# An Umbrella of Solution for All Industries

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## Retail and eCommerce Stores

Customer Portal allows customers to connect better with the enterprise and establish a communication to quickly resolve their requests, queries and complaints. You can also connect with your customers to get them into the loop and send information about your latest offering, new arrivals, sales and other promotional activities.

## Education

A customer portal can help schools, colleges and other educational institutes to upload all their student data and share it to them along with their parents too. Students and parents can log into the portal and go through the reports, knowledge base and all sorts of content provided by the institute.

## Travel and Hospitality

Whether it is top rated hotel or a small travel agency, customer portal will be a crucial tool to simplify the work processing. It can save you customer information and eliminate the need for them to submit their documents and ask preferences everytime. The portal will have all their credentials, choice, schedule and other preferable amenities. For travelling agencies, it can work the most convenience solution as they will send real time notification to users, send their tickets, vouchers and passes directly via portal.

## Banking

There are multiple users having their grievances, requests, questions and other requirements to visit the bank. A dedicated customer portal can help them in various ways. With the help of such portal, they can communicate with bank officials, schedule appointments, request forms and execute umpteen other operation that require them to visit the bank.

## Logistics

This industry has vibrant needs and depends very much upon real time data streaming within your their system and for customers too. Here a customer portal can be the best tool for them as it can provide separate features for both customers and employees. It helps customers to track their shipment, scheduled delivery, change the delivery and do many more things with it.

## Manufacturing

A customer portal for manufacturing industry creates a circuit between the manufacturer, warehouse managers, inventory caretakers, vendors and all the entity that is linked to the unit. It gives an accurate status of the stock that supplies, required and manufactured. It also allows user to manage their quote, orders, contracts and invoices right from the portal.

# Engage Smarter.

## Add Value to Your Customer Base Through CRMJetty Portal.

CRMJetty is a business intelligence solution provider for corporates across all the industries. We specialize in CRM applications with major technologies like Microsoft Dynamics, Salesforce, SugarCRM, and SuiteCRM. Our next generation solutions add improvisation to your process to make it more productive, cost-effective, user-friendly and customer oriented.

Tour [crmjetty.com](http://crmjetty.com) to learn more.

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