

CRM Portals: Get Information to the People who need it the Most

Abstract

This white paper provides a basic definition of a Portal, and then details the key characteristics of a CRM Portal, a Portal that is a component of a CRM system. Different kinds of CRM Portals are discussed in terms of who uses these portals, Customer, Partners, and Employees. Examples are provided of kind of information that can commonly be entered, updated and accessed from each of these types of CRM Portals.

What is a Portal?

A Portal is simply, an access point, a web site featuring a suite of commonly used services, serving as a starting point to the Web. Web portals often include a search engine or directory, news, email, stock quotes, maps, forums, chat, shopping, and options for customization. Large portals may include dozens or hundreds of bundled services.

CRM Portals

What is different about CRM Portals?

A CRM portal is a portal that is a component of a CRM system. A CRM portal is a way to open up the CRM systems to people and organization that you work with, but who are not CRM system users. This allows them the ability to work with the company in an efficient way, regardless of time of day.

CRM portals usually ask the user to log in. When this is done, they are connected to the CRM system. Information about the person and the company for which the person works, can determine what they are able to do on the portal and what information they can access.

In CRM, it is important to record information about each 'touch' that your company has with its prospects and customers. A CRM link to the portal makes this possible. You are able to track who enters the portal, the information and the actions they initiate. This helps you enrich the data you are able to collect.

The CRM portal usually has two kinds of functions. One is to provide the ability to create and update records in the database. The other function is to provide access points to a variety of information that is relevant to the person logging in. All this access is controlled based on who the user is what their relationship with your company is.

Using the Portal

A well-designed Portal will ask the user to log in, and, based on CRM system information, such as Customer Type, provide the access that is authorized by your company and is relevant to that user. This may include the ability to enter information. For example, a Customer Portal might allow a user with a problem to search the company's knowledge base to see if they could find a solution. If an answer is not found, they might be allowed to create a new Customer Support Ticket. They also might be allowed to see status of existing Support Tickets that were previously entered, and to enter new information about the ticket.

In addition to CRM information like Customer Support Tickets, information from other data sources like accounting or order entry can be made available. Usually access to other materials is provided, such as sales and support literature, and company news.

The idea is to provide a means for those constituencies outside the CRM system to interact with your company and to get the materials that they may need, without involving a customer support or sales team member.

Soffront's CRM Portals

Soffront offers three CRM Portals: a Customer Portal, a Partner Portal, and an Employee Portal.

Customer Portal

The Customer Portal is often the most important. A common function of a Customer Portal is to allow "Customer self-support." Customer Self-Support can lower the cost of providing customer support, while at the same time, improving your customer's sense of being provided with quality support when it is needed.

The company's customers can log into the portal and access what has been configured for their use. This can include such things as:

- Obtain Self-Support by searching a Knowledge Management System for a solution to their problems, or referring to a FAQ document.
- Enter and Status Support Tickets.
- Enter and Status Returned Material Authorizations.
- See order status from the Order system.
- See invoice status from the Accounting system.
- Read or download Product literature and company news.
- Download software updates.
- Read and Print CRM reports, such as Service history report.

Partner Portal

The Partner Portal provides a means of distributing and managing Partner Leads, as well as providing the partner with the information they need to be effective. For a typical company, when a lead is assigned to the partner, they immediately get an email, and the lead information is available on the portal. The partner is able to update status, add opportunity information, generate a quote, and request support from the company.

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The company's partners can log into the portal and access what has been configured for their use. This can include such things as:

- Review new leads.
- Update lead status and opportunity information.
- Generate a quotation
- Enter a new lead.
- Review order status report for partner's customers.
- Review support tickets and status for reps customers.
- Enter Support tickets for Customers
- Enter RMAs for Customer
- Read or download Product literature and company news.
- Download software updates.

Employee Portal

The Employee Portal lets the employee enter support requests, and provides a place where the employee can get the information and forms that are needed. Some companies even use their Employee Portal to enter time-card information. Employee portals are often configured so that the employee can update their own information, such as address and phone numbers, etc. This saves time for the HR department. Employee Asset information can also be maintained through the portal.

The company's employees can log into the portal and access what has been configured for their use. This can include such things as:

- Enter Help Desk Ticket
- Review status of Help Desk Tickets previously entered
- Search the Knowledge base for a solution for a problem
- Update employee address and contact information.
- Access company Employee and procedure manuals
- Download employee forms, such as W9 and insurance forms.
- Complete Time Cards.
- See Company news, links, product information, available downloads, etc.

Soffront Software – Mid market CRM Experience, Technology and Focus

Soffront Software Inc., a pioneer in the CRM market since 1992, offers end-to-end, fully integrated CRM solutions consisting of customer and employee help desk management, sales force automation, marketing automation, asset management, contact center, self-service knowledge management and defect tracking. The main differentiator of the Soffront CRM Suite is its capability to auto-generate code based on a user's business specifications—a feature that is unique in the industry. With more than 500 CRM installations worldwide, Soffront's installed base includes Fortune 500 companies, mid-sized businesses, federal agencies and local/state governments. Soffront is privately held with no debt and has been profitable since 1995.





Conclusion

Portals are an important element within a CRM system. They expand the reach of the system beyond the company employees who use the CRM system, to the community in which the company operates. This community includes the company's customers, partners and employees.

Portals make the company easier to work with. This improves their ability to form and keep beneficial relationships with its customer, partners, and employees.

The improvements made possible through the use of CRM portals increase the productivity of the company and its community of customers, partners, and employees.

