What do customers expect from digitalization? They want user-friendly, responsive and customized content, services and tools that are easily available at all points of contact with your company. Using customer portals, you can meet your customers’ needs and expectations and enable them to digitally communicate with you in a seamless, personalized way.

Since appearing as simple websites in the 1990s, portals have evolved into complex applications. Today’s portals are integrated into a range of back-end systems to provide a wealth of highly available personalized information and customized functionality. As digital technologies advance, the way people interact with brands and products is changing. Customers, retailers and employees, for example, all expect secure, personalized and easy-to-use interaction options. These must always be available across different channels - for example, via a smartphone app, voice assistant or a classic web portal. JustRelate provides B2B companies and public sector organizations with future-proof portal solutions that enable them to meet their customers’ expectations and create positive and memorable digital experiences.

90% of customers expect companies to have an online self-service portal.
Individual portal solutions

Depending on the industry and target group, as communication interfaces, portals can have a number of functional characteristics. Customer portals in the B2C environment, for example, have a different focus than channel portals in the B2B sector. There may be certain similarities on a functional level, but there are also distinct differences.

Customer portals

Customer portals digitalize the relationship between customers and companies. They replace classic communication forms such as email, telephone, letter or fax. In the past, these portals only offered relatively simple functions, such as access to documents or the ability to enter data using forms. Modern portals do a lot more. They enable users to interact directly with a company’s service and sales processes. The focus is not only on the uncomplicated provision of information and communication channels along the customer journey, but the company’s products and services can be connected directly to these portals. The key concept here is the Internet of Things (IoT). As an example, devices, systems or machines can report maintenance requests and faults themselves.

One important aspect of customer portals is service. Most customers expect self-service functions because they don’t want to have to contact you personally for every question they have. Since customers’ requests are often similar, they can be easily digitalized. Instead of calling support, customers can enter their requests via the portal at any time and track the processing status in real time. This reduces the need for support staff and increases the quality of your service. Other self-service functions include knowledge bases with frequently asked questions or live chats, where your staff or a chatbot can provide support and offer new deals to customers.

Customer portals are usually integrated deeply into existing IT systems where customer data is managed. These are primarily CRM, ERP and DMS. The front end is often provided via a portal solution or a content management system.

Examples of customer portals:

- Service desks
- Knowledge databases and learning / seminar platforms
- E-government portals
- Virtual events
- Ordering systems and shops
- Sector-specific portals, for example in medicine, education, finance, tourism, telecommunications or for utility providers
- Community sites
- IoT dashboards
Channel portals

Channel portals are used especially in a B2B environment to enable customers or merchants to order products quickly and easily. B2B buyers normally know which products they want to buy. The ordering process in these portals is designed in such a way that customers or merchants search for products via numbers or use preconfigured shopping lists to reorder them as required.

Pricing is often based on customer- or dealer-specific price lists with pre-negotiated discounts. The portal’s portfolio of offers can be highly personalized. Factors such as previous ordering habits, country, industry or expertise can influence the offer available to the merchant or customer and also influence pricing. Another feature of channel portals is their integration with a PIM or ERP system, which transfers product data, inventory levels and pricing information to the portal. These integrations as well as connections to a CRM system and a DMS provide portal users and companies with comprehensive information and services. After logging in, for example, users can view their current terms, invoices, delivery bills and credit bills.

Examples of channel portals:

- Partner portals
- Merchant portals
- Allocation platforms
- Craftsmen and service provider platforms
- Ordering systems and shops
Functions of JustRelate portals

Depending on their intended use, a series of powerful functions are available we combine to develop your individual portal solution. This includes, for example:

- User-related information such as news, messages, product recommendations, open service tickets, documents etc.
- Personalized content, for example on the basis of location, branch, turnover or order history
- Document upload and download functions, for example for invoices, delivery notes and contract documents
- Order status display and overview of products and services already purchased
- Streaming of video content such as explanatory, assembly and installation videos
- E-learning, for example through knowledge databases, videos and podcasts
- E-commerce components for direct orders and commissioning
- Communication, for example through text and video chats or customer forums
- Extensive evaluation of the use of the portal and its functions and content, which you can use to continually improve the portal’s range of offers
In B2B companies, there is a lot of catching up to do when it comes to portals. The B2C world shows where the journey in B2B is headed. Many companies invest little effort in building and maintaining portals, leaving huge potential untapped and conceding this field to market competitors. With a comprehensive and innovative portal, you can stand out from your competitors and make it clear that your focus is on your customers, products and services. Because expertise and trust are important factors for a long-term business relationship in the B2B world, the portal keeps you one step ahead of your competitors.

**Improve customer experience**

Perhaps the most important aspect of your portal is that it allows you to significantly increase your business partners’ and customers’ satisfaction with your company and products. It enables you to turn unloved processes into positive experiences and strengthen customers’ identification with your company. By doing this, you convey to customers that you are available to them around the clock. A perfect customer experience also ensures that the duration and quality of the customer relationship and thus the customer lifetime value (CLV) increase. The relationship between cost of acquisition (CAC) and CLV improves measurably, and your company becomes even more successful.

**Increase turnover**

The advantages of a portal for increasing sales are still underestimated by a lot of B2B companies. Many see it merely as a means to reduce the number of support requests. In fact, a well-designed portal is a powerful tool for customer engagement, for expanding your channels and also for your marketing and sales staff. Ultimately, the platform is a touchpoint that a majority of your customers and merchants will visit repeatedly - provided you offer the appropriate incentives. As soon as a customer or merchant logs on to the portal, you can offer them new deals, cross-sell and up-sell, invite them to events, let them take advantage of a bonus program, ask for feedback and much more.
Acquire new customers

Your portal is not just for existing customers and business partners. You can also make parts of the portal available to the public and integrate it seamlessly into your website. Interesting, search engine-optimized content will attract the attention of potential customers, inform them about your products and put them in touch with your sales department. You can offer exclusive content after a short registration process and inspire future business partners and customers with content that is just right for them in the exploratory phase. If they subsequently enter into a business relationship with you, more features and content will be unlocked for the next phase. Another important aspect is that potential customers perceive you as approachable, customer-oriented and reliable through your portal.

Save running costs

Your JustRelate portal does not require any initial investment in software or hardware, and the costs for ongoing operation are also low. You do not need your own IT infrastructure or personnel for operating it, or costly training for your employees. There is only a usage-based monthly fee with no hidden costs.

Get to know your customers and partners better

A customer portal also leads to lower support costs. In many companies, a large number of employees are kept busy informing customers about the status of their orders or dealing with complaints over the phone. Support staff are confronted with the same questions over and over again, and sales staff regularly receive questions about product specifications. The portal solves all these problems by allowing users to simply inform themselves. This saves costs and unburdens your employees enormously, so they can devote themselves to more important, revenue-generating tasks.

All portal activities can be tracked, measured and analyzed. What may sound a bit exaggerated at first glance offers you invaluable potential for the development of your business. Among other things, you get answers to these questions: Which customers or partners log in very frequently? Which help articles are read the most? Which keywords are used most often in searches? All these puzzle pieces add up to a detailed overall picture of the needs and goals of the respective user. Based on this data, you can work even more efficiently in marketing, sales, product management and support to better serve customers and partners.
A customer portal on the web can meet the unique needs of your customers by providing them with customized content and functionality. Developing a customer portal can require extensive resources. However, if you invest in high-quality web portal software, you can build an effective platform to better serve your customers. In particular, you should pay attention to the following points.

**Customer-focused functions**

Your customer portal should ultimately enhance your customers’ experience with your organization. Because organizations have different goals, it’s rare for two customer portals to have identical features. When developing your portal, focus on features that are most valuable to your customers. This helps them build a lasting relationship with you and gives them a direct link to your products and services.

If you gradually introduce several of these components and build a great web portal around them, you will create a perfect customer experience and foster a long-term relationship with them. In an increasingly digitalized world, a portal tailored to your customers’ needs is an essential component of your company’s success in the future.
Self-service

The term self-service covers all service activities where your customers no longer need to make personal contact with you and your employees. Examples of this are knowledge databases with information about your products, video tutorials with explanations in words and pictures, and FAQ lists that answer the most frequently asked questions. In one study, 90% of users surveyed said they expect companies to provide this kind of self-service functionality. That’s why self-service is crucial for a positive digital experience.

One example of this is where the portal offers your customers the option of maintaining their own data, changing passwords, or tracking the status of support tickets - regardless of location and service times.

Support

Even though your customers and partners can handle most tasks themselves through your portal’s self-service functions, some will still need personal support. There are always unforeseen questions or requests, and some customers will still prefer traditional personal contact with you. That’s why you can offer easy ways for them to contact you using different channels in the portal - for example, via phone, chat, or email.

E-commerce

You can also use your expertise to show your customers how they can get the most benefit from your products - an aspect that is still neglected in many customer portals. So instead of just providing an instruction manual, for example, you provide valuable background knowledge as well as tips and tricks on how to make the most of your products. This is also an excellent way to improve customer satisfaction with you and your products and to build customer loyalty.

You can also use your customer portal as an additional sales channel by offering e-commerce functionalities. Your customers can thus not only view information about your products, but also order them with just a few clicks. Using data from your ERP and CRM systems, you present visitors with targeted offers that might be of interest to them at that moment.
Personalization

Customers want to be understood. They crave brands and products that meet their needs and which are made just for them. That’s why companies can increase revenue by personalizing their portals. Personalization can take many forms - from creating customized products, to leveraging AI, to individual, personal in-store relationships.

Further examples of personalization:

- Individual product configuration
- Loyalty and bonus programs
- Personal product mix
- Weekly individual usage and success reports
- Personalized recommendations through assessments
- Customer status display
- Gamification elements
- Detailed user profiles
- Appropriate further training and leisure opportunities
- Personalized recommendations and support
- Recommendations based on comparable purchasing behavior
Cross-sectional functions

In addition to the original and creative aspects to your portal however, there are also mandatory aspects to bear in mind. It is not uncommon for companies to neglect these more technical aspects because they are mistakenly taken for granted. However, these basic functions indirectly determine success, because the best idea is useless if the basics don’t work. Below are some points to consider.

- **User-friendliness**
  One of the most important requirements for a successful portal is its user-friendliness. All operating steps and functions must be intuitive. This applies to aspects as diverse as navigation, individual text and page layout and the way forms work.

- **Availability**
  Customers must be able to rely on your portal always being available - even at peak times or when there is an unusually high volume of visitors. Even if your portal is only offline for a short time, this can give customers a negative impression of your company and, at worst, damage their trust in you.

- **Support for mobile devices**
  In Europe, mobile devices already account for 56% of all website visits. Depending on the target group and the specific use case, this value can be much higher for your portal. Users thus expect your portal to work smoothly on smartphones and tablets and offer all the features and options of the desktop version. Responsive design ensures that the portal is optimally displayed on all end devices.

- **Customer information security**
  In addition to a customer’s login and password, customer portals can contain confidential information such as personal data, payment information, contract documents or invoices. Therefore, customers expect features like encryption or SSL and want to feel secure when entering private information or accessing confidential documents.

- **Search function**
  The portal’s search function should be easy to use and offer all the features customers are used to from other web applications. These include search filters, auto-completion and error tolerance when entering search terms. The search function should also cover all areas of your portal – including knowledge bases, products and news.
Your portal from JustRelate

★ A platform as unique as your company

Every company is different. You know best what your customers and partners need and how to satisfy them. That’s why JustRelate works with you to develop a completely customized portal, based on the Retain Suite. Instead of using an inflexible standard solution, you can design all aspects of the portal yourself and integrate your systems and processes into it.

Cloud software

The days of self-hosted portals, data centers and huge maintenance efforts are over. As a SaaS (Software as a Service) solution, your JustRelate portal is cloud-based. The applications do not run on your own servers, but on the global infrastructure of Amazon Web Services (AWS). You don’t need to purchase your own software or hardware or worry about updates, backups, and maintenance.

Integrate into your existing IT landscape

Your JustRelate portal can be seamlessly integrated into your existing IT landscape and connected to CRM, ERP and PIM systems, for instance. Information such as customer and product data, stock levels and prices are transferred directly to the portal and displayed there. There are no system interruptions, data is always up-to-date, and your customers’ user experience comes from a single source. It is also possible to integrate existing e-commerce systems into the portal so that your customers can order your products with just a few clicks.

Fast loading times and high availability

The content of your JustRelate portal is delivered via a global Content Delivery Network (CDN). All content is automatically and redundantly held at more than 215 edge locations worldwide. AWS is distributed across 80 availability zones (AZ) in more than 25 regions. Content is always as geographically close to users as possible and loads at lightning speed. This ensures a great user experience, and it can lead to a lower bounce rate of your visitors as well as better rankings on Google and other search engines. Even with poor internet connections - for example, when customers are out in the field - loading times are short. The availability of your portal is defined by a service level agreement and is 99.999%, even during extreme load peaks.

The availability of your portal from JustRelate is

99.9999%
Highest security levels

Security is one of the most important aspects of customer and channel portals. With their state-of-the-art cloud architecture, JustRelate portals minimize vulnerability to hackers and are thus protected from unauthorized access. You can trust the unsurpassed security standards of the global cloud market leader Amazon and our more than 30 years of expertise in operating critical infrastructures. Of course, our portals meet all the requirements of the General Data Protection Regulation (GDPR).

Individual design

The design of your JustRelate portal can be individually customized. In this way, it matches your corporate identity and fits perfectly into your existing websites and applications. If desired, our UX and design experts will take on the creation of the portal and continuously ensure a state-of-the-art design that meets your current requirements.

Individual workflows

The Retain Suite lets you define individual workflows for editing and approving content. For example, you can specify that some editors are only allowed to maintain the knowledge base content, while others can only edit product information. This way, you always retain control over which content is published and by whom.

Collaborative content editing

It can happen that a number of editors are working on content at the same time, in particular on large portals. The Retain Suite therefore offers a working copy function that allows your employees to edit the pages of the portal together, simultaneously and independently. This eliminates conflicts. All changes can be easily discarded if necessary.

Fast set-up

If you have ever worked on the implementation of a web project, you may be familiar with this: The introduction of a new system is usually associated with a great deal of time investment, stress and lengthy training for employees. Because JustRelate pays great attention to an intuitive user experience when developing the Retain Suite, your editors can start working on the portal right away. Tasks such as creating new pages, changing texts or adding new content or functions are easy to perform.
Optimized for search engines

With a portal optimized for search engines, potential customers and dealers who might otherwise never have found you will now become aware of you. The Retain Suite offers all technical prerequisites for high rankings on Google, Bing and other search engines, for example through optimization for mobile devices and short loading times.

Configure Price Quote (CPQ)

If your products have many variants or can be personalized for your customers, you can offer CPQ functions in your portal – including guided selling. Your customers configure products themselves according to their needs, the system calculates the price and creates the scope of delivery as well as quotation and accompanying documents. Data from your existing ERP or PIM systems can be used for the configuration process. If you are already using a CPQ solution, this can also be integrated in your portal.

Simple user management

User management is straightforward with your JustRelate portal. You can easily maintain customer data using your CRM system. The portal can also include permission management, with which you define which users are allowed to access specific content. This way you can offer a portal for different user groups. Prospects, customers and dealers log into the same portal, but based on access management, each group may have different content and functions available.

Managing multiple sites

If your company has multiple brands, audiences or product categories, it may make sense to offer a separate portal for each of them. With the Retain Suite, you can quickly create new sites that access the same data. Digital assets such as images or videos can also be shared between multiple sites. If you sell your products and services internationally, your portal can be offered in other language versions or as separate country sites, without marginal costs.
Main advantages of your JustRelate portal

**Company**
- Improved customer experience, stronger customer loyalty and higher customer lifetime value
- Improved customer satisfaction with products and services
- Increased revenue through new marketing and sales opportunities
- Cost savings in support and sales through self-service
- Improved quality of the services offered
- Evaluations of user behavior with valuable insights for marketing, sales, product management and support
- No initial investment in software or hardware, low costs for ongoing operation

**IT**
- Cloud-native, based on AWS infrastructure
- No requirement for your own IT infrastructure or staff required for operation, maintenance, backups or updates
- Highest availability, scalability and flexibility
- No server attacks possible due to serverless architecture
- Easy integration into existing IT landscapes such as CRM, ERP, and PIM systems
- Headless: 100% of Web builder functions available via APIs
- Development with JavaScript (ReactJS), use of Jamstack
- Management of multiple sites in one system

**Sales**
- New sales opportunities
- Personalized offers for customers
- Cross-selling and upselling
- Direct communication with customers through text and video chats
- Customers can place orders in the portal themselves
- New customer acquisition through public portals
- CPQ functions
- Guided selling
- Omnichannel without additional effort, thanks to responsive and mobile frontends
- Short time-to-market
- User-friendliness, for example through WYSIWYG and widgets
- No extensive training required
- Customized workflows and role management
- Collaborative editing of pages
- Pre-optimized for search engines

Marketing

- Fewer customer inquiries due to self-service and knowledge databases
- Detailed statistics on frequently asked questions and other support requests
- Automated provision of billing, service reports, etc.
The JustRelate Advantage

- More than 170 highly qualified experts
- Deep understanding of marketing, sales and service
- Pioneers of the internet and web
- 650+ active enterprise customers
- 100k+ active users
- State-of-the-art technology
- Innovative full-service stack
- Agile project realization
- Based in the heart of Europe, used worldwide
- 30+ years of experience

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