

## KINETIC DATA

**WHAT'S A TEAM PORTAL?**

*Team portals are basically webpages and apps to interface with teams. It can include ways to contact them, a menu of services and products and many other features.*

**THE BASIC NEEDS OF ALL INFORMATION CONSUMERS**

1. Easy
2. Clear
3. Fast
4. Powerful
5. Freedom

*And this is where your challenge begins. Understanding the users - ALL the users. From the customer, to the people on the queues to the people to whom they pass the work. Each wants to be heard and influence the design and execution of the portal.*

## 7-Steps to a Better Team Portal

### Building portals that delight teams and their peers

**Team Portals**

Team portals are any published material that help customers understand your capabilities, team performance and sets expectations. In these ways, portals serve both you and your peers. This content can take many forms. From a simple poster in the team area all the way up to a digital experience; portals serve to facilitate collaboration and meet demand to provide value.

Since portals can take many forms, they have different effectiveness, and impact on revenue, cost savings, scalability, governance etc. However, these goals will not be reached by adding a portal alone. They also require teams that can operate faster, be innovative and operate more effectively than competition.

This brings me to the most overlooked part of every technology project: the people.

You basically have three main customer groups for every portal. The customer, the provider and your team and peers. Each of these people have unique characteristics. From their unique competencies to their goals there are many misconceptions and assumptions that can be made of people. One place to start when building a team portal are the basic needs of all information consumers (list in the left margin).

These basic needs are the things that will make people happy in the moment they are using your portal. Librarians have known this for years.

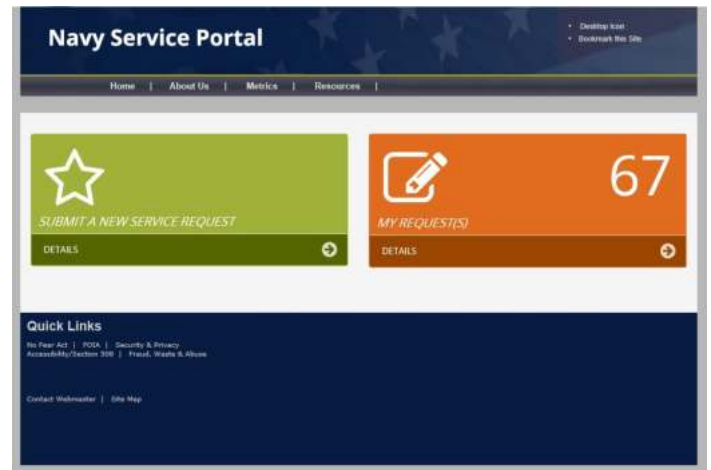
Since your team is also unique and provides a unique service or product, we can't provide much more advice than these very general keys. The rest is up to you to understand and research!

For instance, if you're a hospital exposing self-service check ins speed (#3) is probably more important than freedom (#5). And if you're an IT team, easy (#1) and clear (#2) are probably more important than any other.

And this is where your challenge begins. Understanding the users - ALL the people. From the customer, to the fulfillers on the queues, to the people with whom they share the work. Each wants to be heard and influence the design and execution of the portal.

**This doesn't mean you can take each frustrated user's input into consideration.** Group consensus and good design principles suggest that instead, you use this information as data to research the design.

If you're not a designer or don't have one on your team - well, it's not easy. Designing good systems is highly complex and is learned best through experience and practice. If you're not ready to learn about user research and design, we highly recommend hiring someone with the experience. Having skilled designers available is invaluable and an important step toward lasting success.



An example of an IT Department Portal

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**“we want to be like amazon”**

*...you can't afford to be like amazon AND unless you're in retail, your goals are NOT the same.*

*We often don't communicate well as a group because communication is difficult and people delude themselves into thinking it's simple.*

*So, the easiest way to start a portal is to get a webpage set up. If you don't have a webpage - try making a sign!*

### Step 1: How to get started?

When we look at the common needs of people using portals there are always trends and fads, however, we prefer to start with the basics and keep options open.

Remember that the goal of a portal is to make people happy, getting them the information and action they need. So how do we start doing that?

Most portal projects jump way ahead into the future. They go straight to “we want to be like amazon” or some other phrase like this. Realistically, you can't afford to be amazon AND unless you're in retail, your goals are likely NOT the same. Your top priority should be happiness for your customers and your providers.

The most obvious and noticeable feature of all portals is communication. This is true for amazon - as soon as you go there, they tell you buy something. Think of your portal as a sign hanging on your door. What does your portal say? What does it say about your team?

Historically, and often famously, we don't communicate well as a group because clear communication is difficult and people also delude themselves into thinking it's simple. Portals start building the perception of your; a brand. This may be the first time anyone notices your group exists or the first interaction they've ever had with your team! What do you want them to think?

**“You know what I want and are ready to give me what I want.”  
- Customer**

If you can convince your customer that you understand them, on their first interaction; congratulations, you have reached success.

How did you get here? Understanding the customer. How did you understand them? By listening to them (most likely) - or maybe you were the customer once so you can empathize with them. By way of experience cloud your vision. Always go back to the customer and base your decisions on data. Trusting your gut is something most designers will avoid; you simply cannot trust yourself.

Enough planning - time to get started! So, the easiest way to start a portal is to get a webpage set up. If you don't have a webpage - try making a sign! Use the sign to introduce your team or give directions.

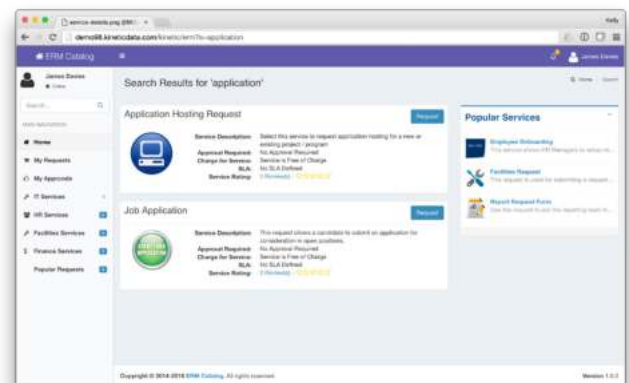
And that's it. Follow up with instructions on next steps or where to go. No fancy technology. No \$3m project. No integration, no automation... nothing. And already your customer has value.

### Step 2: Open the lines of Communication

At this point you've got a website (or sign) up, and you're communicating to your customers, which is adding value and improving their experience.

They want more - what's next? To the customers!

Again “it depends” and we certainly have our opinions, but consider your users first and ask questions.



*This is a demo portal we built as an example.*

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*...communication is a two-way street. Many designers recommend giving your customers a voice. It makes them feel valued and listened to.*

*...anything that allows two way communication will greatly improve the portal's value and demonstrate compassion for customers.*

### **HOW MUCH INFORMATION DOES YOUR TEAM HAVE REGULAR ACCESS TO?**

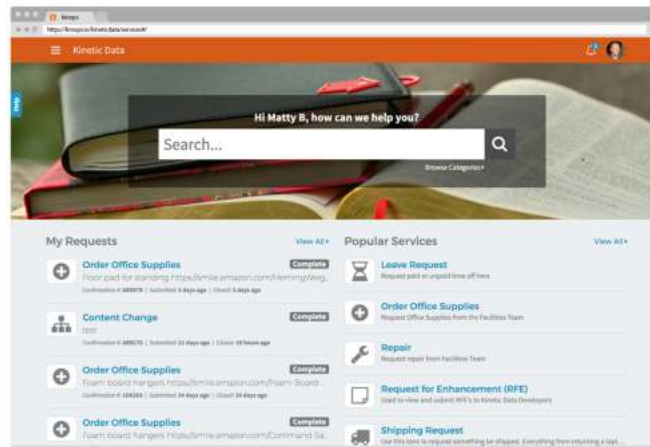
*Is it safe to assume your customers, client and peers would benefit from the same access to the same information? Leverage a portal to extend the data while still maintaining control and governance.*

Start with a story about your customer:

You're a customer of a garbage company. They missed your garbage pick up this week. You go to their website. Once loaded, there is a big banner or pop-up that says "We are experiencing a one-day delay in garbage pick ups" and offers the number to customer service.

How would you rate this experience? Pretty good? This is basically where a portal begins; one-way communication with the option to initiate further. It's a stepping stone to two-way communication.

There's a reason this exists - because communication is a two-way street. Many designers will recommend giving your customers a voice. It makes them feel valued and listened to. This also applies to fulfillment and agent staff; make it easy to communicate and everyone wins.



*This is the Kinetic Data internal company portal*

Now, depending on your culture, needs, audience size and web platform this could take many forms. Maybe you add a chat option so that users can chat with agents or fulfillers or staff directly. Maybe you need a webform? Maybe you just display a phone number call, or a agent chat.

If you've only got a poster outside your team area, put up a blank one and invite visitors to "Leave us a message", anything that enables two way communication

will increase the portal's value and demonstrate compassion for customers.

The chat option is the most advantageous for web pages because it also provides a universal "out" for customers who are stuck, can't find something or just have a simple question.

Test out multiple methods of conversation, and continue the dialog and feedback loop. How are your teammates responding on chat? What happens when no one is available? All of these things need to be taken into consideration when building this beast.

### **Step 3: Captivate Customers with Content**

Now your site is up and running and you can talk to your customers and they can also participate in discussions. Content comes next to provide value. Data. Information. Stories and videos; things that they want access to and examples of how your department or team helps people and the systems and data your teams use every day.

Consider how much information your team has. Building an interface into that information can produce some pretty unique and innovative ideas, solutions and value.

Let's say for instance your team runs a library at a medical device manufacturer. You have access to tons of resources that most people want to access and skim quickly - as well as in-depth research.

Can you extend access to the catalog via a web portal, API or guest access?

This simple integration not only saves time on employee productivity (direct access to information) - it could also lead to a more disciplined approach to product management; which translates to less risk and more profit.

Extending the data your company, team or project already leverages, adds value to your customer when they can do it themselves.

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*evaluate the return-on-investment of the integration, how much will you impact productivity/revenue and finally, understand the total-cost-of-ownership for this integration. Does it require a license? How about staff? Once these considerations are made, hopefully a decision can be made.*

## COMMON PORTAL INTEGRATIONS

- Systems of Record
- Employee directory
- Team directory
- Ticket portal
- knowledge
- databases
- Writing
- How-to
- Company updates
- Team updates
- Project updates
- Fileshare
- Checklists
- Links
- Downloads
- Events/Calendars
- Dashboard/Reporting

*you have just made a terrible mistake*

*Search is a huge part of how people interact with the web. Neglecting search is an active and intentional attempt to derail most modern technology users.*

Take another situation - if you're a bank providing financial services, surely your service partners have access to information and value your customers are begging to get at.

If a bank you offers the information they have, (like credit scores or tips to save money well), they have a way to differentiate from other banks. Some financial institutions have started giving away this kind of information as a marketing tactic to attract new customers and keep existing ones.

These integrations aren't particularly easy. It's not always as easy as copy-pasting an embed code from youtube. Sometimes, though, it is! So explore, test and try it out.

### What systems, information or things do they call your team for all the time, that they could just look up themselves?

Once you discover the systems to share, you'll need to evaluate if your software, website or portal platform can integrate well. Keep in mind, this is a key time to evaluate return-on-investment (ROI) of the integration, how much will you impact productivity/revenue and finally, understand the total-cost-of-ownership for this integration. Does it require a license? How about staff? Once these considerations are made, hopefully a decision can be made.

### Step 4: Seamlessness builds Trust

So far you've gotten a web page up and running, introduced your team, set up a way for your team to talk to customers and another for customers to talk to your team. Then you started exploring the possibility of integrating another system into your portal.

Whether you realize it or not, you have just made a terrible mistake.



No kidding.

The complexity of your little portal has more than doubled. Now that you have this other system "in there" it has the ability to hurt your customer experience! What if that system makes changes? What if the data fails? How will your customers feel? What perception are you giving them?

Which brings us to another element each portion of your portal needs consider; seamlessness.

This is where the total cost of ownership for the portal is likely to increase. More services means more complexity means more operational costs to support the service. If your data source goes down, how does that impact the experience? Do the customers realize it's down? How many ways can you stop a good experience? Too many.

Putting safeguards in place may help. Can you replicate the database/app locally and serve it through the website? This way if it goes down, your copy stays up. Can you make the portal dynamic, so that if the data source is unavailable, users see a different page/experience? How about automated testing and alerting?

This stuff can be expensive - so it's best to know what you're getting into. Try things out, but always be ready to pivot. Partner with great technology teams. You will recognize them when they share your goals and burdens.

What else contributes to a seamless experience for users?

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*Always ask: "What else contributes to a seamless experience for users?"*

*Neglecting search is an active and intentional attempt to derail most modern technology users.*

*I'm working at 2am on my 23rd cup of coffee. I'm excited and inspired to make our company's next new product.*

*Take the opportunity to delight your customers by fulfilling their needs in their time of need.*

Colors, text and words.

This gets messy, but it's still important. To make any experience a good one, your content "should" match. This is a paradox of course. Like perfection; a truly "unified theme" is unattainable. There will always be out of date content. One website will update before all the rest, one document will be out there without an update, this is part of reality. Get ready to work on this for the rest of your life. Hopefully you have platforms that make this reality tolerable or enjoyable.

And as always - test these things and listen to your customers. They will tell you when your search results suck. They will tell you when they can't navigate to their favorite spot in less than 2 clicks. They are here for you!

### Step 5: Put your Portal in their Pocket

If you've made it this far and you now have a system of customer engagement; congratulations. This is a goal many brands fail at many many times before seeing success. What could customers want next?

Ask them! But here's a suggestion; give them access to the portal whenever and wherever they need it. Most modern users will expect this new system of engagement to be with them at all times.

"Oh hey, I should tell finance about this material shortage that is predicted by our research partners" - goes to finance portal on iPhone.

"I need to order 300 pounds of rubber." - goes to procurement portal on Android.

"I like Peter. What's his email address?" - looks up employee info on a web browser on his child's internet connected pillow.

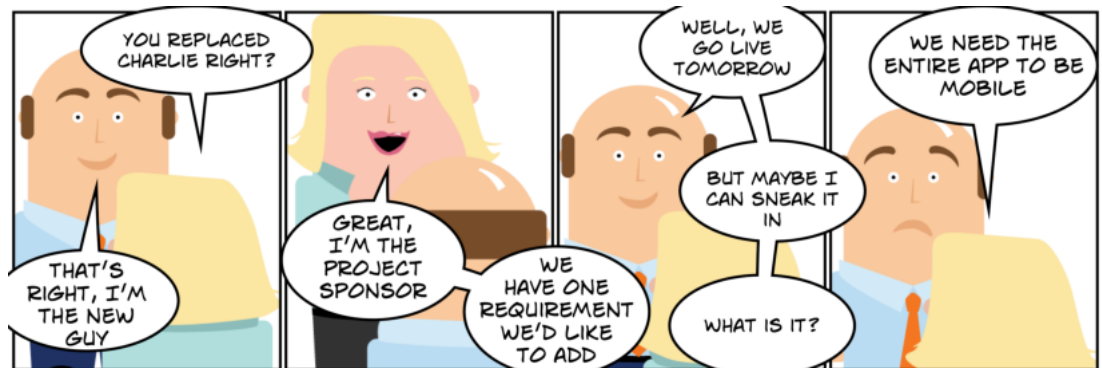
Take the opportunity to delight your customers by fulfilling their needs in their time of need. These are the realities of today. These are not predictions. Your colleagues and co-workers deserve the right to work freely and to do so when it's convenient to them and on their terms.

Does your portal require Internet Explorer 11 so that business rules can be enforced? Terrible.

Does your portal require an app be installed? Bad.

Gone are these old limits of web development. Now there is only disruption, connection and communication. The rest is just a check-box on a management system.

Get every customer engagement on mobile to keep them as a customer.



### Step 6: Improve Navigation and Taxonomy

Before search, the internet was pretty simple. You either knew someone who knew where to look for thing, or you knew where to look. Is your portal the same way? Is tribal knowledge required to find the right things?

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*Search as a function of a web page is also much simpler technologically than ever before.*

*Portals with personality are the best thing on earth.*

*Bonus points if you take the time needed to understand, listen and sympathize with their problems.*

**WHAT'S NEXT**

Ready to build a team portal?

Let us learn with you.

<http://kineticdata.com>

Want to talk to Wally? Contact us at [sales@kineticdata.com](mailto:sales@kineticdata.com) or 1-651-556-1030.

Without search, it's difficult for users to find what they need. Search as a function of a web page much simpler technologically than ever before. Therefore, adding powerful and meaningful search to your content is basically a given. Enable search.

Okay, so now search is turned on, what's next?

Make sure search works well! Does it find the things people want? Can you watch what people are searching for and landing on? Maybe what you call your "ERP system" is what most users call "Domino" or "MyApp" or something else, enable search to find the right thing when these terms are searched!

After search is working well, look out for other nonsensical "browsing" type taxonomies. This would include the ever-terrible categorization of things. What makes sense to one user may not make sense to another.

### Step 7: Stay Fascinated with the Customer!

Personas allow you to present the right things to the right people. And if you ask the people, they will tell you the right time to present them.

Portals with personality are the best thing on earth.

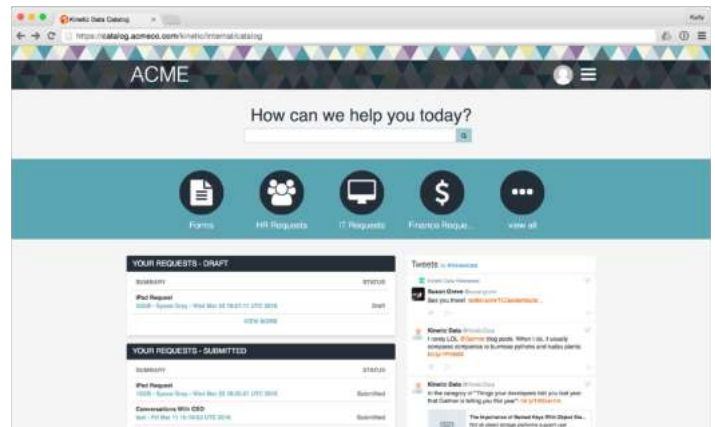
Amazon is great at suggesting things related to what customers have purchased, but what if they could also change the navigation, browsing and prioritization of product presentation based on who they are? If they are a creative person in marketing so amazon knows they buy tools to fulfil those roles. What are similar tools and information in my your teams' roles?

This is one place where you have a major advantage over Amazon. You can know your people much better. You probably also serve a MUCH smaller market. Take advantage of this by knowing your customer and delighting them. Show them the tools they can leverage, and help them do so. Bonus points if you take the time needed to understand, listen and sympathize with their problems.

Categories of things usually aren't going to be friendly to those unaware of how things are divided between those categories. Essentially, each person probably has their own way of understanding "where" different services and products *should* be. Put your categories/departments and various views in front of customers and see if they can tell where to find things. Time them. Then give them search. Time them again. Which one wins? Is there a use-case where the customer wants categories? Can you segment that experience? Maybe it's for a specific group, or batch ordering - can you give that access to a select set of customers?

This basically covers most navigation needs - there are other non-product and non-services navigation items to consider. Things like profiles, shopping cart (if you have one), information, FAQ, contact and other secondary content should be accessible with navigation.

Navigation is impossible to get truly perfect. Simplicity is usually the key. If your portal software doesn't have a default, consider hiring great designers and get constant feedback from customers. Do a bunch of user research. It's going to take a lot of work to even get close to appealing to customers.



*This portal is shared across multiple teams.*