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# **IT Business Brief**

## **Implementing Effective Portals by Peter Brown**

**Enterprise Networking**

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## Portals: More than a Home Page

*Jim Metzler, Ashton, Metzler & Associates*

When you ask most people what they think of when they hear "portal," the most common reaction is a public Internet search engine like Google or AltaVista. But today, this concept pioneered on the public Internet is quickly becoming an integral part of the corporate information infrastructure, enabling companies of all sizes to interact more efficiently and effectively with their customers, business partners, and employees.

Portals are an important topic for two key reasons. One of the reasons is that portals provide a window into an enterprise's content and applications. As such, portals have quickly become the preferred method of access for many companies.

But portals are important for a more fundamental and personal reason. When an IT organization upgrades the "behind the walls" infrastructure, most Business Unit Managers (BUMs) neither know about it nor don't care about it. However, when an IT organization deploys a portal it is highly visible to these same BUMs.

However, successful portal deployment is not easy. It involves a tight linkage between business requirements and a variety of thorny IT issues, including security and content.

**Implementing Effective Portals** is a primer on portals written by Peter Brown of PwC, an end user who has successfully deployed an enterprise-wide portal. As Peter observes in the article, "Though the portal is a relatively new phenomenon, building one requires excellence in our age-old specialties: understanding the customer, operational excellence, and continued education."



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## Implementing Effective Portals

Peter Brown

Are you a forward thinker? Are you searching for innovative tools and ways to transform your business and demonstrate your leadership? If so, read on.

Portals are a new piece of IT infrastructure, and they are here to stay. Yes, they are relatively new to enterprises and not widely understood. But portals afford you an unprecedented opportunity to demonstrate leadership to your business counterparts and direct the transformation of your company into the electronic age.

To be successful, it helps to understand the portal basics—terminology, building blocks, potential global architecture, and lessons learned. Understanding these components helps position you as a critical contributor to the business transformation process.

There are many myths associated with portals, so let's start by reviewing the definition of portals and their evolution. Webster defines a portal as follows:

1. *door, entrance: esp. a grand or imposing one;*
2. *the whole architectural composition surrounding and including the doorways and porches of a church.*

The definition and reference to portals from Gartner, the IT research firm, reads this way:

*A Web site or service that offers a broad array of resources and services, such as e-mail, forums, search engines, and online shopping malls.*

In less than four years, portals have evolved into the premier entry point into the IT infrastructure. A portal itself contains no content and is not an application per se. Instead, it is a window into an enterprise's content and applications.

### Types of Portals

There are various kinds of portals, and what differentiates them is the nature of the content they display to the customer. There are four main types:

- Business to Client (B2C)
- Business to Employee (B2E)
- Business to Business (B2B)
- Business to Employee to Client (B2E2C)

A *B2C portal* usually presents global information to clients and customers around the world. Branding, intellectual property protection, and a consistent look-and-feel are usually some of the defining B2C characteristics.

By contrast, a *B2E portal* is likely to present local information and applications to the client, who, in this case, is an employee. This is easily understood when you consider the information that employees require to function effectively. A global organization's employees in the U.S., for example, require information on their own benefits and generally aren't interested in those of

their counterparts in Japan. However, there might be a thin layer of global B2E content accessible through a B2E portal, such as the corporate mission or message from the Chairman.

For its part, the *B2B portal* is structured to enable an enterprise to more easily interact with suppliers. It, too, is usually populated with local information and applications.

And finally, the *B2E2C portal* is the most recent variation to emerge. It tends to be focused on internal content that an enterprise wants to transmit to its employees who, in turn, will use it when interacting with their customers. Portals for internal use are often aligned on a functional basis (for example, the "human resources portal," the "marketing portal," and so forth).

### Business Drivers

Now that you have a clear understanding of the types of portals used in businesses today, let's explore why companies build them in the first place. The primary drivers for creating this interactive tool include the following:

- Decreased communications and marketing costs
- Decreased time to market
- Greater business agility
- Increased ease of doing business
- The ability to reach multiple markets with a consistent visual identity
- Consistent branding presentation
- Risk-and-privacy protection

The savings a portal will generate depends on the current level of self-service and intranet usage within the enterprise. Depending on its size, an enterprise with little self-service currently in place can save millions of dollars through portal usage. On the other hand, an enterprise already highly automated that introduces a B2E portal will more likely benefit by significantly easing the process of doing business. This advantage comes about by quickly enabling employees to reach all the applications they require to conduct a day's work with a single logon and password.

Internal B2E portals are usually introduced to reduce communications costs and to provide information to employees consistently and quickly. They also enable an enterprise to communicate the same information to employees with one simple posting, thus eliminating the barriers of time and distance.

B2C portals, on the other hand, are more focused on consistency in branding and the customer experience. They enhance a business's agility by enabling enterprises to adjust quickly to changes in the marketplace and to get information to customers in a timely fashion. And, of course, B2C portals position companies to excel at electronic marketing and sales.

B2C portals also allow an enterprise to reduce risk and protect privacy by having a single, controlled presence in the electronic marketplace. This way, organizations can continually monitor their brand and how intellectual property is presented to customers.

The opportunity to analyze the profiles of existing and potential customers is available with B2C portals, as well as tracking customer preferences and the ways customers react to specific information.

Portals, both B2C and B2E, usually support multi-language capabilities, broadening the potential audience for minimal added cost. Each type of portal also lets you know which individuals have access to each piece of information.

## Defining the Terms

Portals have introduced new terminology and capabilities to the IT industry. It's important to have the vernacular down before delving into the exercise of planning and building a portal. The terms and capabilities surrounding portals include *authorization*, *authentication*, *personalization*, *profiling*, and *search*, defined below:

- **Authentication** - Verifying whether someone or something

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is, in fact, who or what it is claims to be.

- **Authorization** - The process of giving someone permission to do something or gain access to information.
- **Personalization** - Preparing the information presented to each individual based on that individual's personal characteristics; for example, customizing information to be useful to a tax expert working in the coffee business in North America and who holds major investments in Brazil.
- **Profiling** - Grouping customers, vendors, or staff with common attributes (for example, all managers with five or more years of employment) for the purpose of personalization, targeted marketing, reporting, and service improvement.
- **Search** - To scan a large amount of information that has been appropriately tagged and categorized and return to requesters a list of references where they will find information on the specific topic they are seeking.

Most business people have used some or all of these capabilities via the Internet or in another capacity. Everyone is used to "authorizing" certain people to review specific elements of your business, for example, and we all are familiar with searching for specific information by sorting through a stack of reports. The power of portals is the ability to execute these functions in an automated fash-

ion so that individuals can quickly search vast quantities of information and distill it to a few meaningful trends and facts.

## Getting Started

Now that you understand the power of portals, I'm sure you want to get started building one. How?

The answer is the same basic one you have heard 100 times. From a business standpoint, you must first determine the following:

- Who is the customer?
- What are the real requirements (and how do you find out what they are)?
- What is the business strategy for portal use, whether internal, external, or both?

From a technology standpoint you must address the following questions:

- Are you going to adopt best-of-breed or out-of-the box solutions?
- Who owns the content?
- Is there a content strategy?

These questions are no different from others you have faced before from an IT standpoint. My suggestion in getting started is to enlist a key business sponsor who is senior in the enterprise. This individual must be a verbal champion, have the ability to remove political roadblocks, and be willing to provide funding for the effort or influence the key purse-string holders.

From a technology standpoint, I recommend dividing the portal into subsets or building blocks of functionality with separate but linked plans for each subset of the required functionality.

One technical segmentation approach that has been used successfully is to divide the overall portal functionality into four sub-elements:

- Core Portal Functionality
- Enterprise Infrastructure
- Content
- Legacy Infrastructure

A critical point to keep in mind when building a portal is that you need the structure to function as a global system, but you also need an owner of each subsystem. This is because the strength of each subsystem contributes to the functional success of the portal as a whole.

As with any IT system, major elements of a portal system can be outsourced. An enterprise can build its own enterprise directory system, authorization system, and search system, or it can outsource all or subsets of these systems. Clearly, though, the legacy infrastructure is a key to portal performance, because Internet connectivity, addressing, and other basic networking elements are fundamental performance building blocks. Core portal functionality can be purchased from leading suppliers, but all packages require customization to some degree to interact appropriately with the e-infrastructure and with an enterprise's own content.

The content to be “served up” to customers is usually the most under-planned and overlooked element of a portal. Content must be planned and architected concurrently with the procurement of the hardware and software elements of the base portal. Content is usually produced internally. It is dependent on a carefully planned, architected approach to segmenting information, tagging it, and making it available for searching. It is difficult, if not impossible, to externally source enterprise-specific content.

## Building a Winner

For an organization to create and operate a successful portal, significant time, talent, and energy must be focused on content preparation and presentation. Often, the business leader that sponsors the portal effort will need to personally drive the content planning and development, while the IT professional delivers the physical portal system.

Portals are requiring chief technology officers and applications leaders to integrate their efforts more than ever. The IT infrastructure leaders must become comfortable managing the real estate elements of the presentation or interaction layer of the portal. They must now also learn to value content and to connect to the elusive

“content-rich back-office systems,” which for decades fell under the sole purview of the applications officer.

Portals are global systems that have many critical sub-elements but, at a systems level, they are much like most other complex IT systems. To successfully introduce a portal requires careful planning, systems management, and customer focus.

Though the portal is a relatively new phenomenon, building one requires excellence in our age-old specialties: understanding the customer, operational excellence, and continued education.



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