# BE CONVENIENT
# BE HELPFUL
# BE IMPRESSIVE

How to Design, Develop, Manage & Measure Success of Customer Portals

tenlo
an amg company

# What Is A Customer Portal?

**88%**
OF CUSTOMERS
**EXPECT A**
CUSTOMER
**PORTAL**

In short, a customer portal is an information center. It's a secure website that makes it easy for current customers to access personal data about their interactions with your company. This account-specific information can include everything from orders and payments to shipping and deliveries.

# Why Are Customer Portals So Important?

## To Meet Customer Expectations

We live in a “now” economy. Thanks to the internet, customers are in control of the marketplace—not businesses. If customers want something now, they expect it now.

**Make a purchase? Now.**

**Track a delivery? Now.**

**Make a payment? Now.**

If the question is “When?” The answer is “Now.”

A customer portal empowers customers to instantly access all of their account information when and where they want it. No phone calls, no emails ... just immediate answers.

## To Build Customer Lifetime Value

A customer portal gives businesses the opportunity to learn more about their customers. By monitoring their preferences, shopping behaviors and purchasing habits, you can personalize their experience with your company.

This allows businesses to cross-sell, up-sell and recommend related products that are meaningful to the customer. This high-value service ensures ongoing customer engagement.

A customer portal fuels the company’s ability to offer customized service, personalize the experience, and ultimately, increase customer lifetime value and retention.

# Common Design Challenges of Customer Portals

Our team members have 35+ years of combined experience designing, developing and managing customer portals for B2B and B2C applications. Those experiences have taught us that, in order to be successful, a customer portal must deliver the ideal experience for users. Here are some of the biggest hurdles we've encountered and overcome along the way.

**1 IN 3 CUSTOMERS LEAVE A BRAND THEY LOVE AFTER JUST ONE BAD EXPERIENCE**

## Difficult Sign-On

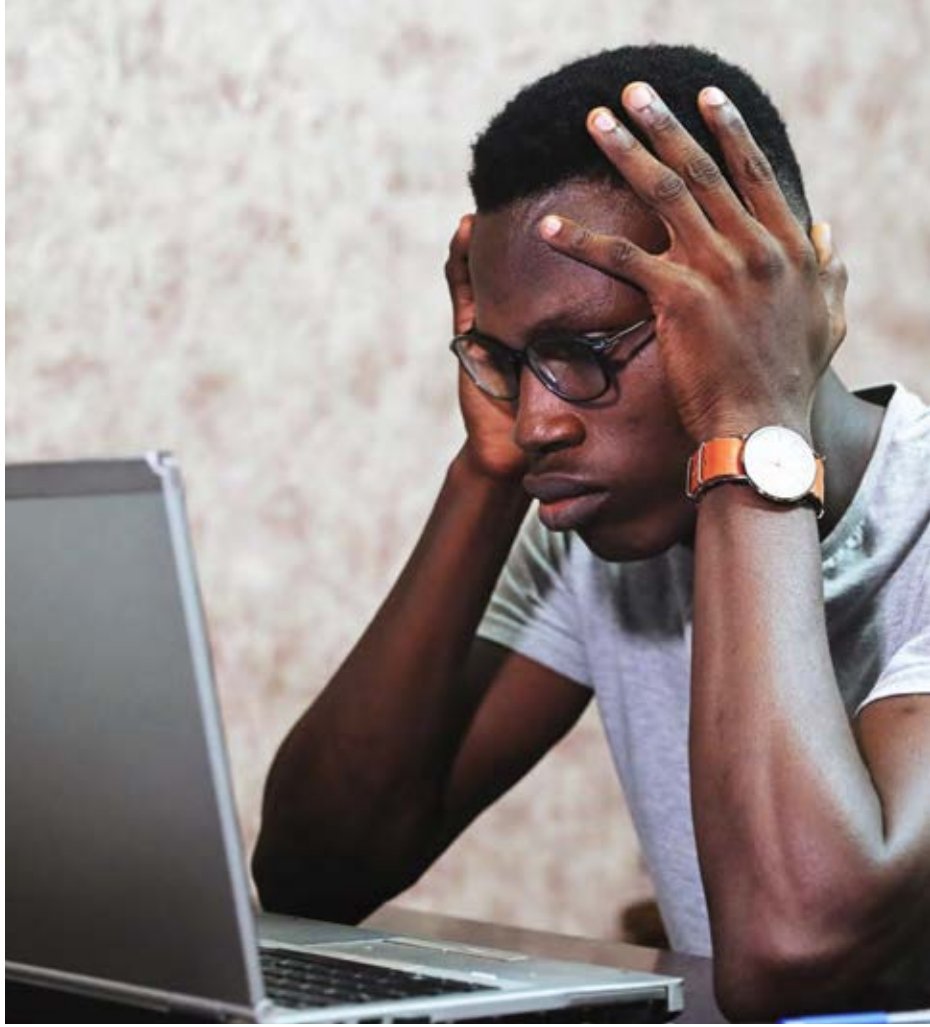
20% - 50% of customer service calls are to reset passwords, which only represents the people who are willing to call; single sign-on, multiple registration options and easy password recovery are key to a great user experience

## Multiple Portals

for the same customer don't have a single sign-on or clearly defined purpose and technical architecture, creating confusion and technical debt

## Customer Experience Landscape

failure to recognize the customer portal will be accessed by various devices (desktop, mobile phone, tablet) and via different channels (social media, email, chat, phone, SMS), leading to a poor user experience



"The biggest mistake I've seen was while working on a dealer portal for a Fortune 500 company. Customers who forgot their password had to call a 1-800 number ... then wait 5 business days for a response."

**Cheryl Boehm**
Director of Copywriting

## Irrelevant Product & Service Recommendations

provide no value and turn customers off, leading to distrust and deceased loyalty

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## Unpersonalized Experience

burdening customers by requiring them to enter the same information over and over, like a billing or delivery address, creates user frustration

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## Unidentified Role

failure to understand how the portal fits into the customer experience and interacts with other business systems, including sales, operations, customer service and billing; customer portal usage drops to less than 10% if it doesn't fulfill a critical purpose that saves time

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## Poor Data Capture

collecting the right data allows you to easily personalize, connect the customer experience across the landscape, personalize that experience across touch points and make highly relevant product and service recommendations that are valued by the customer.

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## Too Many Administrative Features

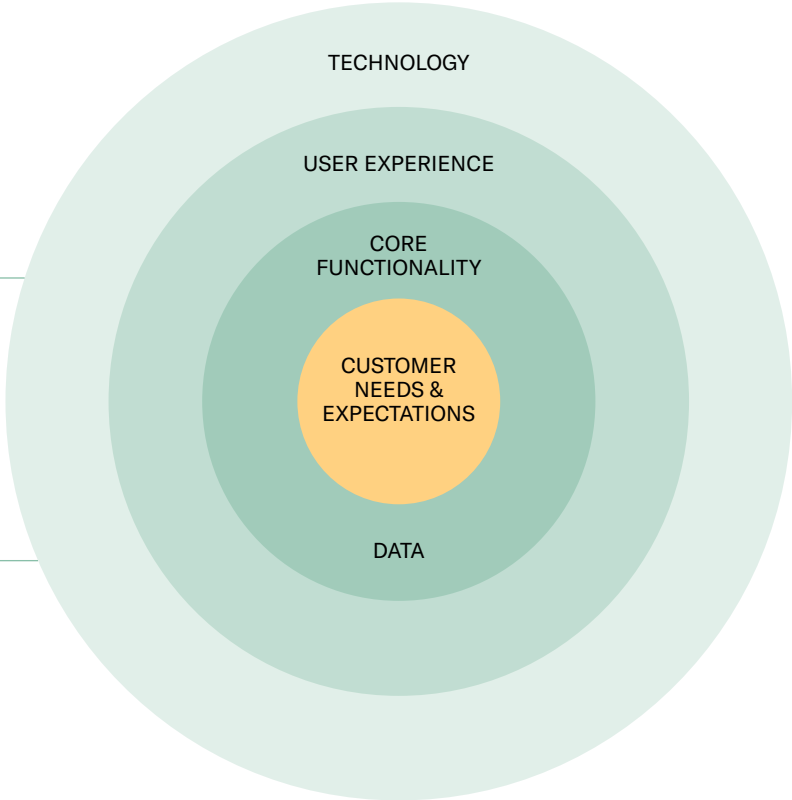
adding a lot of bells and whistles or supporting technology can create scope creep, delay launch and lower the effectiveness of the final portal for customers and the business

> "When I was working on the portal for a large subscription service with a 40% mobile audience, customers were directed to log on a desktop when they tried to access their account via phone."

**Patty Parobek**
Director of Integrated Marketing Strategy

# Create A Customer-Centric Experience

Most businesses build their customer portal from the outside-in, based on their current technology. At Tenlo, we use a data-driven MVP (Minimally Viable Product) approach that starts from the inside-out and focuses on customer needs.




The purpose of building an MVP customer portal is to get the website up-and-running quickly. We do this by designing and developing a customer portal that delivers the 3-5 features that are most critical to an intuitive, low-barrier customer experience.

Through proper management and measurement, we then collect important feedback from customers. Once we have the data, we can easily incorporate it to future optimizations, continuing to improve the customer experience over time.

**MVP (Minimally Viable Product)**
MVP (Minimally Viable Product) is a development technique. The customer portal website is initially developed with sufficient features to satisfy immediate customer needs. The final, complete set of features is only designed and developed after considering feedback from initial users.

## Related Reading

- → Importance of MVP Websites: 3 Iterative Development Advantages
- → MVP Website Development: 3 Steps Before You Begin
- → Defining An MVP Website: 3-Step MVP Approach

# Make Connections With Customers

A portal with a genuine user-centric experience creates a real emotional connection with customers. It has behavioral “hooks” that surprise and delight customers at every critical touchpoint. A user-centric experience that forms an emotional connection is the key to growing customer lifetime value, loyalty and retention. Here are the three ways to do just that.

## Be Convenient

Make life easier on customers. Empower them to easily make purchases, track shipping, view order history, rate products, refer friends, change payment methods, manage privacy and communication settings—whenever, wherever, on any device.

## Be Helpful

Remind customers of critical dates, recommend meaningful products, share relevant content, proactively fix issues, anticipate challenges—do whatever it takes to remove barriers.

## Be Impressive

Offer the highest security, auto-fill form fields, connect with them in digital channels they frequently use, reward loyalty—go above and beyond to create a highly memorable experience every change you get.

# Our Strategic Process: COLLABORATE, DESIGN, LAUNCH

Data and collaboration are at the heart of our web design and development process. We use the latest responsive web design and development techniques to make your customer portal look good, work hard and be at the heart your customer experience.

## Our Strategic Process

# COLLABORATE

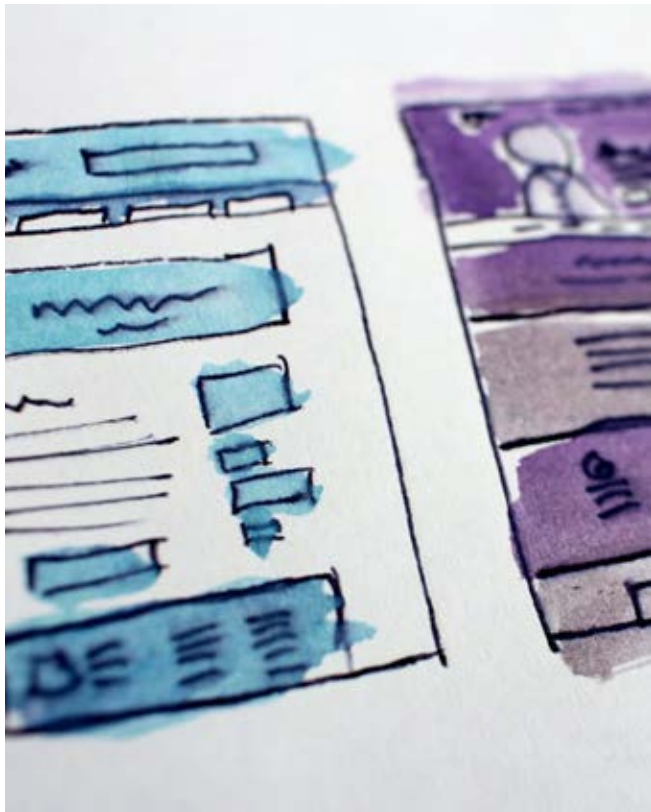
- **Kick off with a client workshop**
- **Full website and supporting tech-stack audit**
- **Digital landscape**
- **Customer survey**
- **Evaluate customer research, including surveys, focus groups or Net Promoter Score (NPS) data**
- **Review chat, call reporting and analytics to determine user trends**
- **Audit comments, reviews, suggestions**
- **API documentation**
- **Licensing, security and SLA protocols across the technical stack**
- **Stakeholder conversations – Technical Lead, Field or Sales Operations, Marketing**

## Our Strategic Process

# DESIGN

We run this stage of our process in 2-week sprints. This ensures you provide feedback and approval before we stand up the customer portal prototype. We also evaluate user experience and consistency across all devices and browsers. Then, incorporate the design and messaging directly into the prototype so there are no surprises.

- **Technical architecture**
- **User flow and experience**
- **Limit user barriers and data entry**
- **Seamless & efficient graphic design**
- **Messaging**
- **Prototype**
- **Data capture**



## Our Strategic Process

# LAUNCH

After the prototype is approved,
we move onto development.

- **Develop the website**
- **Integrate modern analytics platforms (like Google Analytics and Matomo)**
- **Perform end-to-end QA testing**
- **Launch the website**
- **Track user paths, conversion rates and drop-off points**
- **Deliver highly accessible, actionable analytics data**

# Core Team

Our team members have **35+ years of combined experience** in designing, developing, managing and measuring the success of customer portals for world-class companies.

## Tessa Burg

**VP of UX & Technology Strategy**
Has lead strategy, software and user experience design for customer portals as a marketer and software product manager at Vecmer International, American Greetings and SparkBase, and as an agency strategist for brands like RTA, Sherwin-Williams and US Compliance.

*"My proudest moment working on a customer portal was backfilling Salesforce with customer purchase history and preference for the sales and retail teams."*

## Patty Parobek

**Dir. of Integrated Marketing Strategy**
Has worked on customer portals at American Greetings, Blue Mountain and US Compliance. This includes updating the experience through multiple site redesigns in partnership with UX as well as migrating portals from homegrown systems to enterprise CMS.

*"On a portal project, we listened to customer feedback and incorporated returning user pricing options within the experience to increase lifetime value by double digits."*

## Sabin Boruz

**Web Technologist**
Experience ranges from front-end development and back-end business logic to database architecture and quality assurance. Includes building a customer portal from the ground up and porting over legacy systems to newer performance-oriented stacks. Also has a robust background in developing API functionality for customer portals.

*"My biggest success has been leading efforts to build out reporting and analytics API functionality for an extensive loyalty processing platform, running through custom-built ETL (extract transform load) processes backed by an internal data warehouse."*

## Crystal Madrilejos

**VP of Creative Strategy**
Has worked on customer portals for tech startups, including retail loyalty programs, healthcare IT systems and wholesale apparel. On these projects, Crystal has covered various responsibilities, such as creative direction, UI design, UX support and project management.

## Cheryl Boehm

**Director of Copywriting**
Has worked on multiple customer portals for one of the world's leading tire companies. Responsibilities included UX support, creative direction, messaging, content, and CMS management.

# About Tenlo

Tenlo is a digital marketing agency.
We use data-driven marketing for lead generation and customer retention.
We align digital and sales tactics to drive more traffic to your website.
Our passion is pipeline marketing—a discipline focused on increasing a digital marketer's contribution to sales results.

## Core Services

- **Website Design & Development**
- **Digital Marketing Strategy**
- **Lead Generation**

**www.tenlo.com**