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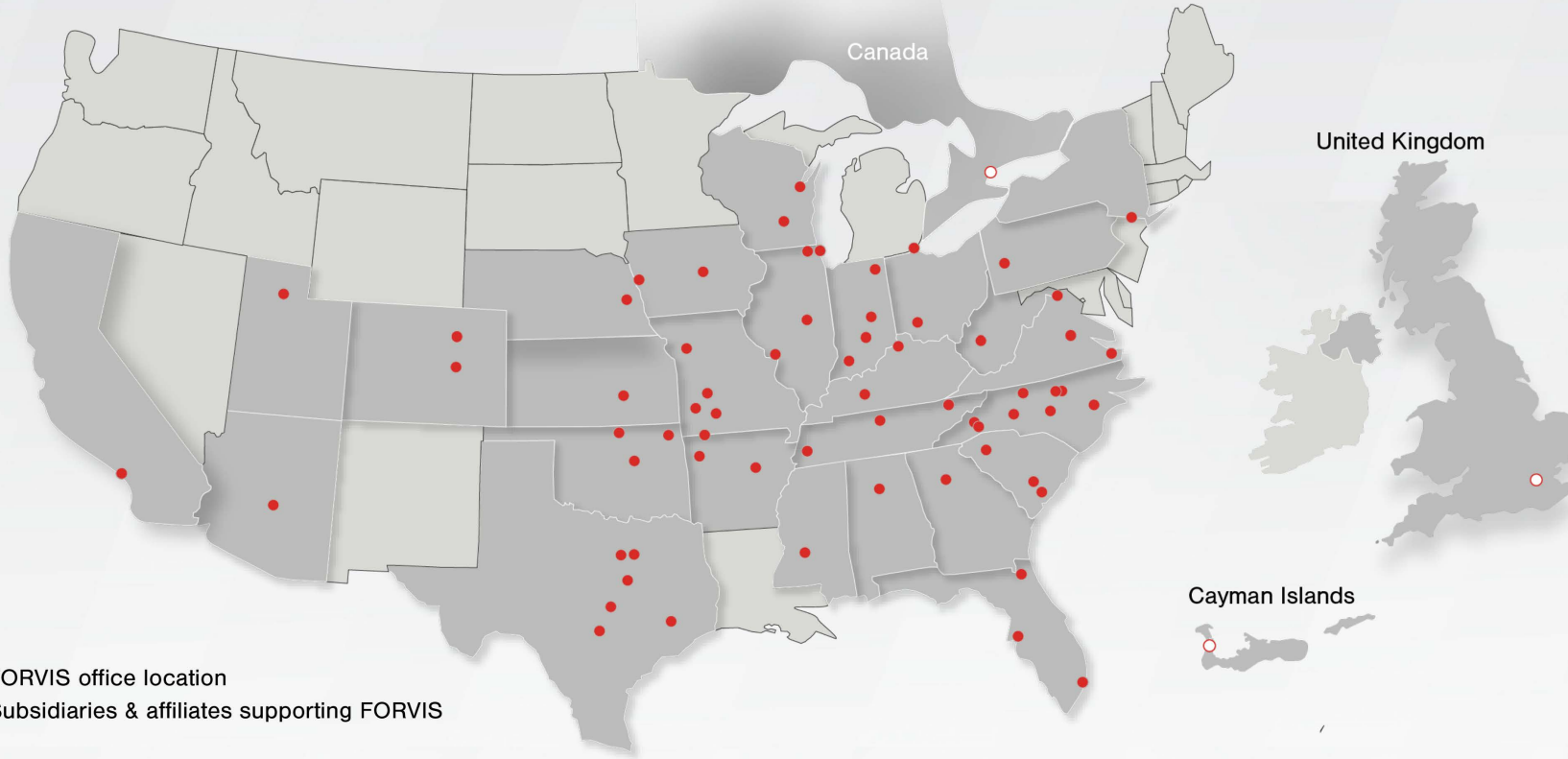**Business Technology Solutions**

How to Empower Customers With Self-Service Portals

February 15, 2024

Global Presence & Reach

- ● FORVIS office location
- ○ Subsidiaries & affiliates supporting FORVIS

By the Numbers

Top 10
U.S. Public Accounting Firm *

27
States + Canada, U.K., & **
Cayman Islands

10+
Industries

68
Markets

500+
Partners & Principals

6,000+
Team Members

Subsidiaries & Affiliates Supporting FORVIS

- ▪ FORVIS Capital Advisors, LLC
- ▪ FORVIS Wealth Advisors, LLC
- ▪ FORVIS Global Advisory Canada ULC**
- ▪ FORVIS Global Advisory Ltd. UK**
- ▪ TALENT SHIFT, LLC

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PRAXITY™
Empowering Business Globally

FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.

Business Technology Solutions

Business Technology Solutions at **FORVIS** provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

Microsoft Partner | salesforce **PARTNER**

In addition, our Insights & Automation team provides business intelligence (BI) and robotic process automation (RPA) services. Our Marketing Consulting team provides marketing automation platform and marketing campaign support services.
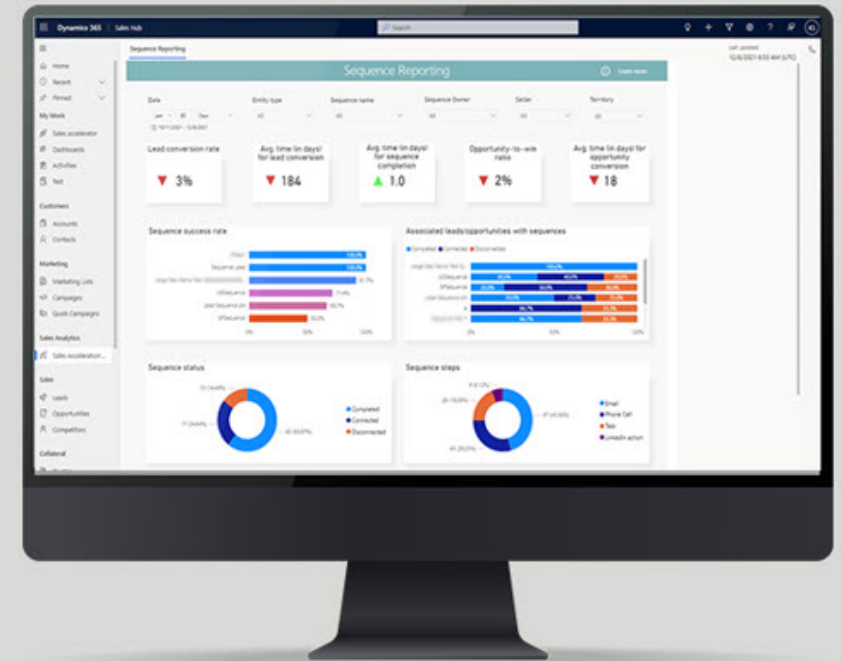
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From sales forecasting to financial reporting, learn what CRM and ERP technologies can do.

Meet the Presenters

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How to Empower Customers With Self-Service Portals

Business Technology Solutions

February 15, 2023

Objectives

- Discuss how to **enhance the customer experience** with Salesforce & Dynamics 365 self-service portals for your customers, business partners, or dealers

- Describe common **use cases** & the **benefits** to your business & overall customer experience

- Identify the differences between integrating customer & dealer self-service portals with **Salesforce** & **Dynamics 365**

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Agenda

- What's a Portal

- Important Features of a Portal

- Common Use Cases

- Benefits

- Use Case Deep Dive

- Portal Demonstrations

- Q&A

What's a Portal

Definition

por·tal¹

/ˈpôrdl/

noun

noun: **portal**; plural noun: **portals**

1. a doorway, gate, or other entrance, especially a large and imposing one.

   Similar: doorway | gateway | entrance | way in | way out | exit | egress | ⌄

2. a website or web page providing access or links to other sites.
   "many healthcare providers already utilize portals through which a patient can access test results"

Origin

late Middle English: from Old French, from medieval Latin *portale* 'like a gate', from Latin *porta* 'door, gate'.

Gartner Glossary > Information Technology Glossary > P > Portal

Portal

A **portal** is a high-traffic website with a wide range of content, services and vendor links. It acts as a value-added middleman by selecting the content sources and assembling them in a simple-to-navigate and customize interface for presentation to the end user. Portals typically offer such services as Web searching, news, reference tools, access to online shopping venues, and communications capabilities including e-mail and chat rooms.

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Terminology

- Salesforce's portal technology is called **Salesforce Experience Cloud** (formerly Salesforce Portals, Community Cloud)

  - Salesforce Experience Cloud helps you create branded digital experiences to share information & collaborate with people who are key to your business processes, such as customers, partners, or employees. Whether you call it a portal, help forum, support community, or something else, an Experience Cloud site can be a great place to connect with your audience

- Microsoft's portal technology is called **Microsoft Power Pages** (formerly Power Apps Portals, Dynamics 365 Portals) & is part of the Microsoft Power Platform

  - Microsoft Power Pages is a secure, enterprise-grade, low-code software as a service (SaaS) platform for creating, hosting, & administering modern external-facing business websites. Whether you're a low-code maker or a professional developer, Power Pages can help you rapidly design, configure, & publish websites that work across web browsers & devices

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Important Features

Important Portal Features

- **User Authentication & Account Management**

  - Secure user authentication so only authorized individuals can access personal information
  - Account management tools so users can update their profiles, change passwords, & manage preferences

- **Multichannel Support**

  - Integration with various communication channels such as email, chat, & social media
  - Consistent user experience across different devices & platforms

- **Integration With CRM Systems**

  - Seamless integration with CRM platforms like Dynamics 365 or Salesforce for real-time access to customer data
  - Ability to view & update account information, track orders, & manage subscriptions

- **Personalization**

  - Personalized user dashboards based on individual preferences & previous interactions
  - Customizable settings to tailor the portal experience to each user's needs

- **Branding**

  - Ability to customize logo & color schemes to match your organization's branding

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Important Portal Features

- **Mobile Responsiveness**

  - A mobile-friendly design that helps users access the portal from smartphones & tablets
  - Responsive layouts for optimal usability on various screen sizes

- **Analytics & Reporting**

  - Tracking & reporting tools to monitor portal usage, popular search queries, & customer feedback
  - Insights that can inform improvements to content & services

- **Automation & Chatbots**

  - Automation features to handle routine tasks & processes without human intervention
  - Integration of chatbots to provide instant responses & assist users in real-time

- **Multi-Language Support**

  - Support for multiple languages to cater to a diverse customer base
  - Localization features to adapt content & interfaces to different regions
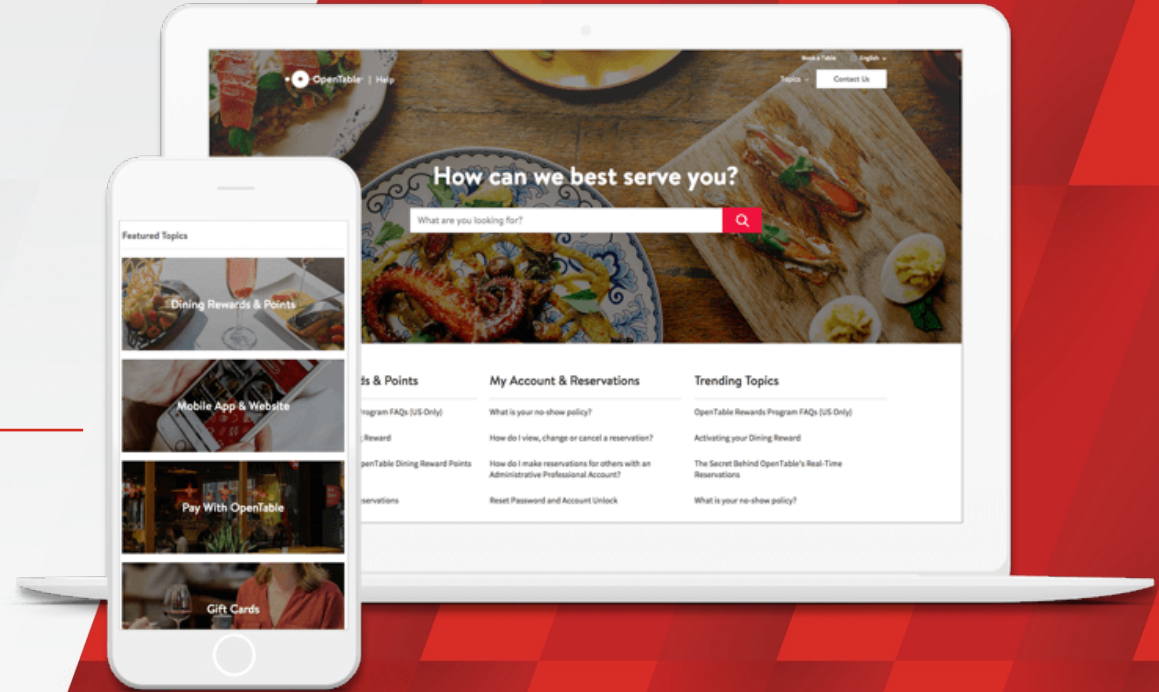
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Common Use Cases

Use Cases

- **Knowledge Base Access**
  - Providing customers with access to a comprehensive knowledge base containing articles, FAQs, troubleshooting guides, & how-to documents

- **Case Management**
  - Allowing customers to submit, track, & manage support cases online, providing updates & resolutions without direct contact with customer support representatives

- **Order Tracking & Management**
  - Enabling customers to track the status of their orders, view order history, & manage shipping & delivery preferences

- **Account Information & Management**
  - Allowing customers to access & update their account information, manage subscriptions, & make changes to their profiles

- **Billing & Payment Assistance**
  - Providing self-service options for customers to view & understand their bills, make payments, & set up or modify payment methods

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Use Cases

- **Product & Service Information**
  - Offering detailed information about products & services, including specifications, features, pricing, & availability

- **Appointment Scheduling**
  - Allowing customers to schedule, reschedule, or cancel appointments for services, consultations, or support

- **Community Forums & User Discussions**
  - Creating a space for customers to engage with each other, share experiences, & seek advice in community forums or discussion groups

- **Feedback & Surveys**
  - Gathering customer feedback on products, services, & the customer experience through surveys, ratings, & reviews

- **Returns & Exchanges**
  - Providing a self-service process for initiating & managing product returns, exchanges, or warranty claims

- **Training & Onboarding**
  - Offering training resources, tutorials, & onboarding materials to help customers get started with products or services

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Benefits

Benefits

- **24/7 Accessibility**
- **Reduced Workload for Service**
- **Cost Savings**
- **Faster Issue Resolution**
- **Improved Customer Satisfaction**

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Benefits

- **Enhanced Productivity**
- **Personalization & Customization**
- **Data Insights**
- **Scalability**
- **CRM Integration**

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Use Case Deep Dive

Customer Service Portal

- Allow customers to do some of the work that their customer service representative would need to do

- Make information available 24/7 to the customer

- Allow customers to maintain their own data so it's accurate & up to date

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Customer Service Portal

Knowledge Base	**Case Management**	**Account Management**
	Order Tracking	**Product & Service Information**

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Customer Service Portal

Appointment Scheduling	**Community Forums**
Feedback & Surveys	**Live Chat Support**

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Partner/Dealer Portal

- Provides for real-time collaboration with partners/dealers

- Creates efficiencies in communication

- Fosters accountability

- Increases ease of doing business

- What's the alternative?

Partner/Dealer Portal

Product & Pricing Information

Order Management

Inventory Management

Sales & Performance Reports

Training & Certification

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Partner/Dealer Portal

Marketing & Promotional Materials

Lead Management

Deal Registration

Co-Branding Support

Communication & Collaboration

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Partner/Dealer Portal

Support & Issue Resolution

Contract & Document Management

Training & Event Calendar

Performance Incentives & Rewards

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How We Can Assist
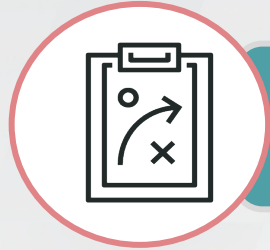
Digital Transformation Strategy

Technology Vision & Execution

- Current/Future State Business & IT Review
- Solution Assessment, Selection, & Licensing
- Execution Planning

Existing Solution Analysis & Recommendations

- Project Rescues
- Migrations/Upgrades
- Optimization/User Adoption
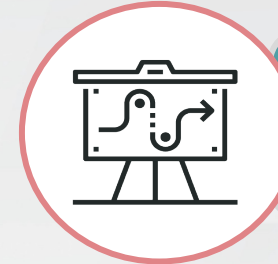
Digital Transformation Execution

Solution Execution

- Business Process Assessments
- Platform Selection
- Design, Build, & Support
- Supply Chain Assessments
- Sales & Marketing Consultation
- System Integrations
- Upgrades & Migrations
- Business Intelligence & Analytics

Project Management

- Project Monitoring & Management
- Project Audit & Stabilization

Organizational Change Management

- Transition Readiness
- Change Management
- End User & Administrator Training
- Post-Implementation Support

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What's Next

Answer Business Questions With Solver Ad Hoc Reporting

February 28
10 a.m. ET

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WEBINAR

Answer Business Questions
Quickly With Solver Ad Hoc Reporting

Wednesday, February 28 • 10–11 a.m. ET

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Questions?

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Thank you!

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