

# Top 5 Portals for Business



**1. CUSTOMER  
SUPPORT**



**2. EVENT  
MANAGEMENT**



**3. ORDER  
MANAGEMENT**



**4. PRODUCT/  
WARRANTY  
MANAGEMENT**



**5. MEMBERSHIP  
MANAGEMENT**

**What is a Portal?** It is a website that lets your customers interact/engage with your company and leverage the value of the data you have in your Dynamics CRM system.

## Top 5 Business Uses for a Portal:



**1. CUSTOMER  
SUPPORT**

**The situation without a portal:**

- Customers want 24/7 access to support information and service
- Resourcing a full time Customer Support Service is costly when customers could self serve online
- Receiving Customer support requests by phone slows the flow of reviewing and delivering customer services that effectively resolve the issues

**The benefit of a portal:**

- End Customers get better service via self-service
- Customers can access support updates 24 hours a day
- Improved efficiency of support resources and reducing the time to resolution
- Happy Customer is a return customer



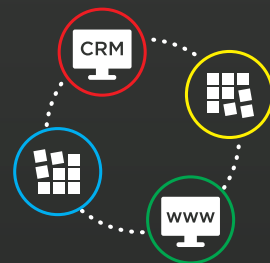
**2. EVENT  
MANAGEMENT**

**The situation without a portal:**

- Don't have visibility into who is registering and how full an event is
- Fluctuating resources required to handle inbound call volumes
- Manual registration process and billing is time consuming
- Customer frustration for being on the phone to complete registration process

**The benefit of a portal:**

- Access to immediate/real time visibility into event registration status
- Decreased inbound call volumes, and improved efficiency of resources
- Automated payment process, improves satisfaction for the customer and increases efficiency for your business



**3. ORDER  
MANAGEMENT**

**The situation without a portal:**

- Having resources to handle customer information requests, like “what is the status of my order” or “what is my tracking number”
- Wanting to deliver a higher level of service
- Competitors are offering this service, and gaining an edge

**The benefit of a portal:**

- Customers get immediate access to information
- Improved customer service
- Reduced inbound call volume



**4. PRODUCT/  
WARRANTY  
MANAGEMENT**

**The situation without a portal:**

- Not knowing who is linked to what product
- Frustrated customers looking for immediate answers and response
- Manual process for entering warranty info from mailed warranty card
- Manual process to direct customers to closest service location
- Manually executing the steps required to process an RMA

**The benefit of a portal:**

- Gathering more accurate customer data
- Improved customer satisfaction by getting quick answers
- Faster and more accurate RMA experience for the Customer
- Reduced labor requirements for handling customer warranty's or RMA requests



**5. MEMBERSHIP  
MANAGEMENT**

**The situation without a portal:**

- Lack of confidence in member data accuracy
- Member profile management updates are time consuming and not happening
- Large volumes of renewal requests happen at certain times

**The benefit of a portal:**

- Improved data accuracy, as members keep their own information up to date
- Provide member self service capabilities they can access 24/7
- Ability to handle large volumes of updates, through automated processes
- Improved member service and member loyalty

The Portal Connector allows you to create all these portals and more. With an easy to use solution that you can manage without knowing a line of code!

To continue investigating a portal for your business, you may find our “Things to Ask when considering a portal” a great resource.

**PORTALS ARE USED FOR;**

- ✓ Driving improved customer support
- ✓ Enabling customer self-service

- ✓ Provisioning customer services
- ✓ Reducing internal time spent doing something