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The Outside-In Portal

Want your enterprise portal to justify its cost right away? Make sure that it continually reflects user needs

By Grant Norris & David J. Duray

Today, most corporate employees fill multiple roles within their organizations. Titles no longer articulate the full scope of employee responsibilities or reflect the information workers must process and manage to effectively meet job objectives. Technology continues to be unleashed in offices and cubicles in a dizzying pace — all under the banner of improved speed, efficiency, and user-friendliness. Yet the data deluge continues.

Portals are increasingly recognized for their ability to streamline disparate streams of information and package it in an easily accessible, personalized interface. For employees facing information overload, portals serve as a filter, allowing relevant information to pass through, and then provide click-through access to the applications and services that allow employees to act on the information.

A general misunderstanding exists among organizations on how and when to deploy portal technology. Some companies believe content-driving systems should be fleshed-out to provide employees with a complete and comprehensive tool the day the portal goes live. However, this approach implies that an organization is offering its employees a finished product, rather than a dynamic tool driven by a constantly evolving back office. As a result, a key value proposition of a portal strategy is neutralized.

A more effective approach for companies considering portals is to build IT systems from the "outside-in": In other words, build the portal first, leveraging existing information, applications, and services, and fill in the gaps and modify the information sources in the back end on an ongoing basis. This approach creates a portal that's dynamic and constantly changing to meet the needs of the business and the roles that support business functions.

A Leap of Faith?

The organizational changes required to deploy an outside-in portal strategy are significant, but the technological changes are much less daunting. Implementing portal technology is not unlike implementing any other major computer system. Therefore, the portal shell can and should be installed first. Even, and especially, companies with multiple legacy systems should consider this approach because it makes the portal serve as a linking layer for disparate systems, as well as pool content and knowledge.

One reason for a lack of urgency in deploying portals is the concern that the investment may fall by the wayside. The resistance to additional IT build-out stems partly from the ERP systems movement during the previous decade. Companies integrated their transactional data and process information, yet many still don't fully utilize the information that these systems generate. As a result, they're reluctant to listen to the sales pitch that calls for additional spending. The outside-in approach minimizes additional spending by focusing on the portal itself and leveraging existing sources of information or only building out as needed.

Portals actually lower technology costs — both hardware and software — because applications reside on a server rather than on an individual's PC. Users access applications through their customized workplace front ends; the only software actually installed on the desktop is a standard Web browser. Less software on the desktop means lower installation and maintenance costs, and it eliminates the need to upgrade hardware to run increasingly sophisticated computer programs. Portal browsers and intuitive interfaces also eliminate the need to perform targeted training on specific applications.

Implementing an outside-in portal strategy shouldn't be a leap of faith. The time and cost benefits to the organization, employees, executives, partners, and customers are both logical and clearly defined.

Facilitating Productivity

Taking an outside-in approach facilitates productivity improvements by allowing priority applications to be implemented first. In addition to pushing out information required for a specific job function, the portal screen also provides click-through access to applications that the employee needs to act on the information. Portal users can navigate easily among different applications and use "drag-and-relate" technology, for instance, to combine material from various sources in a way that's most natural.

Employees focused on customer service are prime beneficiaries. For example, a customer requests maintenance through a company Web site. The request is received and pushed out to maintenance

Executive Summary

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Portals provide the means to deliver information pertinent to any employee's role, from a "C"-level employee to a maintenance engineer. An outside-in approach to implementation allows your company to start immediately and have the flexibility to prioritize the rollout of function and content to internal and external users.

scheduling and ranked against all other requests appearing on the portal screen, given a priority status, and, based on availability, assigned to a field service engineer. The field service engineer uses the portal to determine proper tools and supplies and whether they're in stock. If the supplies are on hand the work is scheduled using software in the portal to optimize a route based on all required stops and transit time from point to point. The field service engineer sets an appointment time, which the customer validates. When on site, the field service engineer performs the maintenance and accesses a portal screen via a handheld device and closes the job ticket. The closed ticket is automatically routed to customer billing, and an invoice is generated on the next invoice process run.

This example illustrates the benefits to multiple parties. The customer perceives an increase in reliability via real-time and accurate responsiveness. The field service engineer is more efficient, and the host company can anticipate an increase in customer retention and speedier payment.

Yet portals shouldn't be limited to employees directly involved with customers. Senior executives such as the CFO can also benefit. The CFO role continues to migrate from the corporate police officer focused on examining corporate spending to one of value creation. Today's CFO must monitor strategic performance indicators, yet also drive business development and mergers and acquisitions initiatives. Portals are flexible enough to support both the day-to-day business reporting responsibilities as well as long-term strategic tasks.

Neither the CFO nor the field service engineer is required to remember or learn arcane ERP transaction codes, yet both can access critical information faster. In addition, as the organization inserts or removes applications and modules, each user's routine will have minimal disruption.

Keeping Partners Happy

The true power of portals is found in communication between an enterprise and its partners. Collaboration is a fashionable buzzword, but few organizations have mastered the art of collaborating with external parties. A portal allows those within an enterprise to interact with all members of the enterprise ecosystem, including suppliers of materials, components, and subassemblies; partners who provide information, applications, and services; and business partners such as banks, insurance companies, and logistics providers.

Some partners even use the applications on the host company's workplace server. Here, the company itself may become an application service provider (ASP) for its collaborating partners. Conversely, a partner can serve as an ASP for the central company with the portal facilitating the rollout of this service to employees. Access can be tailored to the needs of the partner to ensure only authorized data is visible.

Many challenges that are notorious for dooming partnerships can be eased through a portal implementation. Lag time in partner communications is reduced, thereby improving time to market. XML can be deployed behind the portal to eliminate the constraint to specific system requirements. Technology training time and costs are minimized. Most important, portal "push" technology drives monitoring of project goals and key performance indicators for both the project owner and each partner in the chain.

Change Management: A Way of Life

As noted earlier, the IT portion of a portal implementation doesn't present unique challenges. Rather, the majority of the company's emphasis should be on the change management required to migrate employees to the portal platform.

Portals minimize training over time, but can create initial anxiety about how the new interface will affect daily work. Traditional change management prepares employees for the outcome of change: moving from A to B. Yet portals both allow and promote rapid change. Therefore, part of implementing a portal interface is modifying workers' expectations to understand that change is a permanent characteristic of the corporate environment, and a company's ability to handle constant change is a significant corporate asset.

When the portal is in place, change management becomes less cumbersome because the portal becomes a change facilitator. Companies that follow the outside-in approach and deploy the portals in the early stages of systems build-out minimize the education and training required when back-end systems are added or modified.

Content is Key

The critical success factor in a successful portal implementation is content; the content displayed on the portal must be relevant. Merely pushing out data through a portal won't necessarily improve an employee's productivity. Productivity is enhanced when intermediaries manipulate and analyze data, turning it into useful information. Depending on the depth of a portal's content offerings, for every one technical specialist a company needs to maintain its portal, it will require between four and 10 content specialists — researchers, writers, editors, and Web site and graphics producers — to provide a timely stream of useful information to portal users.

As the portal gains acceptance within the workplace and begins providing value, companies must allocate human resources to test, analyze, and determine the usefulness of new applications before they're added to those already available through the company's workplace.

The goal in a portal implementation is to get the maximum number of people to use the portal as quickly as possible. The outside-in approach supports this goal by providing the flexibility to prioritize applications that have the biggest impact. One of the early challenges facing all companies implementing portals is providing users with a fine-tuned balance of applications and content that are useful to them (for example, email, benefits management, and corporate travel management) and ones that are more useful to the company (such as supply chain management or CRM). Portal designers must analyze the needs of individuals who'll be using the system and determine which products best satisfy both the company's and the individuals' personal needs as they fulfill their roles.

Unlike previous solutions, portals provide a golden opportunity to deliver information that's pertinent to an employee's role; filtered, eliminating the need for individuals to wade through so much information that they become frustrated by the process; and flexible, so that even when roles change, the system remains relevant, easily navigable, and useful. The outside-in approach

dictates that the sooner a company can begin a portal implementation the better for the company. Employees and partners will log on to the portal with the understanding that every information source, application, and service appearing on their screen is relevant. Companies will be in a position to fully leverage previous and future IT investments and significantly enhance employee, partner, and customer collaboration in the process.

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RESOURCES

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