



CUSTOMER PORTAL
SOLUTIONS FROM

ADEPT DYNAMICS

*Business technology solutions
for a rapidly changing world*

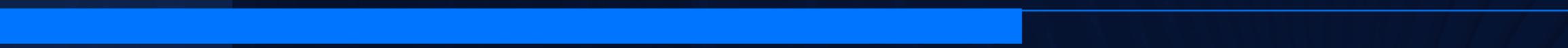


Connect and share data with your team's stakeholders, safely and intuitively.

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INTRODUCTION





Adept Dynamics is a digital consultancy that conceives and implements technology strategies and solutions on behalf of our client organizations.

Adept Dynamics is a digital consultancy that applies cutting-edge technology strategies and solutions to improve business organizations around the world.

We leverage our team's diverse professional experiences and technical skillsets to bring forward transformational business strategies to prepare our clients for the business opportunities and challenges of tomorrow.

Rooted in our overarching mission to unlock lasting business transformation for organizations everywhere, Adept Dynamics now proudly offers industry-leading customer and client portal solutions

Adept is uniquely positioned to conceive, build, and implement web portals that can unlock a virtually unlimited range of business transformation outcomes for our clients.

– available to both our existing and new clients alike. Leveraging our team's unique role as business technology strategists, Adept is uniquely positioned to conceive, build, and implement web portals that can unlock a virtually unlimited range of business transformation outcomes for our clients.

By serving as intuitive digital touchpoints that strengthen the relationships between an organization and its external stakeholders, portals are a critical tool for any modern business.

When an organization selects Adept Dynamics to conceive and implement a portal solution, we take extreme care in ensuring that we properly understand the business requirements for the technology – these requirements then lay the foundation for our development strategy. We are also adamant that relevant client team members (the individuals that will serve as the portal's daily users and administrators), are involved in all major project milestones – from kickoff week to acceptance testing. By leading with a consultancy-first approach and

incorporating critical stakeholders into our work, Adept's portal team serves as more than just portal developers; we become true partners in our clients' success journeys.

This informative guide provides business leaders like yourself with an overview of modern customer portals by contextualizing their increasingly central role in the modern business landscape, while also detailing Adept Dynamics' portal offerings. Through this guide, we hope to convey the immense potential that portals play in an increasingly digitized business landscape.

I couldn't be more excited about Adept's portal offerings and the immense potential that they can bring to organizations everywhere.

CHRIS KEEGAN,
Founder and CEO, Adept Dynamics

*When a company
chooses Adept Dynamics,*

*it's choosing more than
improved technology –
it's choosing to realize
its full potential.*

DEFINING WEB PORTAL TECHNOLOGY

DEFINING WEB PORTAL TECHNOLOGY

Simply put, a portal is a specially designed website that enables an organization's team members the ability to better share pre-designated data with predetermined audiences. These audiences can either be internal (other employees) or external (partners, customers, government agencies, etc.).

A well-designed portal coalesces organizational information from diverse sources and presents it in coherent and useful ways that integrate seamlessly into existing processes and business flows.

A web portal traditionally pulls organizational data from a central repository (like a CRM database) before presenting it in a specific format based on the external authorized user that needs to access the information. This data can be displayed as categorized data, links, services, and other interactive elements.

Portals serve as low-code, personalized websites that can meet a wide variety of different organizational requirements.

In today's hyper-connected business landscape, portals are rapidly becoming a business requirement for organizations that need to communicate information quickly and accurately to outside parties.

Gone are the days when a business' customers or its partners are willing to wait for critical information to reach them on the organization's terms. Rapid digital transformation at all levels has shifted data delivery expectations for both customers and business partners alike. These groups expect pertinent information at a moment's notice, and are comfortable using self-service technology platforms to access the information.



A recent survey by Statista found that

88%

of respondents expect an organization they interact with to provide some form of online service portal.

How organizations decide to navigate this emerging demand could mean the difference between satisfied customers or missed expectations.

WHEN a business problem does occur, or issues related to an organization's products or services need to be addressed, external stakeholders and customers expect reliable service and support options. Traditional contact centers and support agents can help meet some remediation solutions. However, picking up a phone, sending an email, or even reaching out through social media can often lead to a negative experience.

Customer and client portals do not operate from SQL web servers; they are dynamic information systems from which externally presented information is simply a reflection of pre-designated internal data. This data is created and organized through the normal course of business. This means that any information that's accessible through a portal is organically generated in the background without portal-specific action efforts (unlike a website which requires content to be manually drafted and input). A well-conceived portal therefore integrates itself into an organization naturally and becomes increasingly central to its users' procedures without commensurate focus, scale, or cost.

Often, portals (such as ecommerce portals) personalize the information each user accesses to what they need to gain from the platform. Portals often have dedicated areas for displaying pertinent information based on the user-type accessing it; organizations can fully configure the specific data displayed.

For any organization that hopes to engage its customers and clients faster and more effectively, portals are a highly effective solution.

PORTALS

- Help to eliminate process bottlenecks and barriers;
- Push resources to the channels where they're needed most
- Improve the digital interactive experiences for important external audiences.

At Adept Dynamics, we set ourselves apart through our unparalleled technology-capabilities and real-world business experience.

When an organization trusts our team to deliver a custom portal solution, we take the time to properly understand the business use cases that we're solving for, the development and technological requirements, and the optimal end-state for the technology's end-state users. This strategic approach allows us to serve as more than developers to our clients; it enables us to be partners in their business transformation journeys.

Adept Dynamics' portals offer safe and seamless information access to our clients' most important internal and external stakeholders.



ADEPT DYNAMICS PORTAL SOLUTIONS

APPLICATION AND USE CASES

REPORTING

If your organization is managing data associated with clients, partners or a larger external community, its likely that your team will benefit from a centrally integrated portal solution.

When a portal is properly designed , it quickly becomes a go-to business resource for both internal and external parties alike. Through organic business adoption and increased user-trust, a customer portal serves as a front-line receiver for critical data that can be used for a wide range of different reporting and data analysis functions.

With limited to no agent involvement, a portal can passively collect critical business information that an internal team can use to make strategic business decisions. Internal teams can also use customer-facing portals to track customer interactions with greater accuracy and insight, helping to identify reoccurring issues and spot emerging challenges.

Sometimes when a business' customers conduct their own research away from a business' central platform, it can be difficult for business teams to make sense of their

pain points or expectations. By providing a secure customer portal experience that internal teams have full access into, businesses can track their customers' resolution journeys step-by-step and analyze if their needs are being met. This allows for ongoing improvement to business processes and procedures.

Longer term, if an organization can deliver a comfortable and productive user-experience utilizing a portal, they can turn monthly active users into daily active users (creating more data through feedback and in-turn driving business improvements).



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AUTOMATION

One of the most important, yet often overlooked benefits, of a well-designed and integrated portal is its ability to organically drive business process automation (BPA).

BPA is generally defined as the usage of technology solutions to automate repeatable, multistep business transactions. It's common for organizations to apply BPA as part of a larger digital transformation strategy.

Once a portal is implemented and is in-use with its intended internal and external parties, employees will immediately benefit by having to spend less time on routine, time-intensive tasks like interfacing with customers on support requests or facilitating business procedures triggered by external groups. A properly utilized portal achieves this by effectively placing certain business engagement mechanisms

in the hands of predetermined external parties, like a trusted business partner. For example, a portal allows a partner to directly request certain information that they need for a routine business procedure or engage a business action directly. Without a portal in place, these tasks normally require deliberate business to partner interactions (like a phone call or email).

Over time, a customer portal allows an organization's team members to focus on the tasks where their skills and passions are best applied.

By entrusting a portal with the facilitation of existing business processes, organizations can automate some of their most time-intensive tasks and give valuable time back to their team members.

Business process automation can be realized in various form and outputs, each unique to the organization and its portal design.

EXAMPLES INCLUDE:

automatically created and managed cases, assignment of resources, and system-triggered updates. Business automation results can also include system oversight of common customer requests—changing their account address, applying for a loan, upgrading a plan, etc.



CUSTOMER RELATIONSHIP MANAGEMENT

Customer Portals, which are portals specifically designed for customer interactions, provide an invaluable touchpoint between a business and its valued customers. Through these intuitive digital touchpoints, organizations can strengthen customer trust and loyalty by providing an easy-to-use conduit for rapid support, relevant product or service information, and up-to-date statuses on existing support tickets.

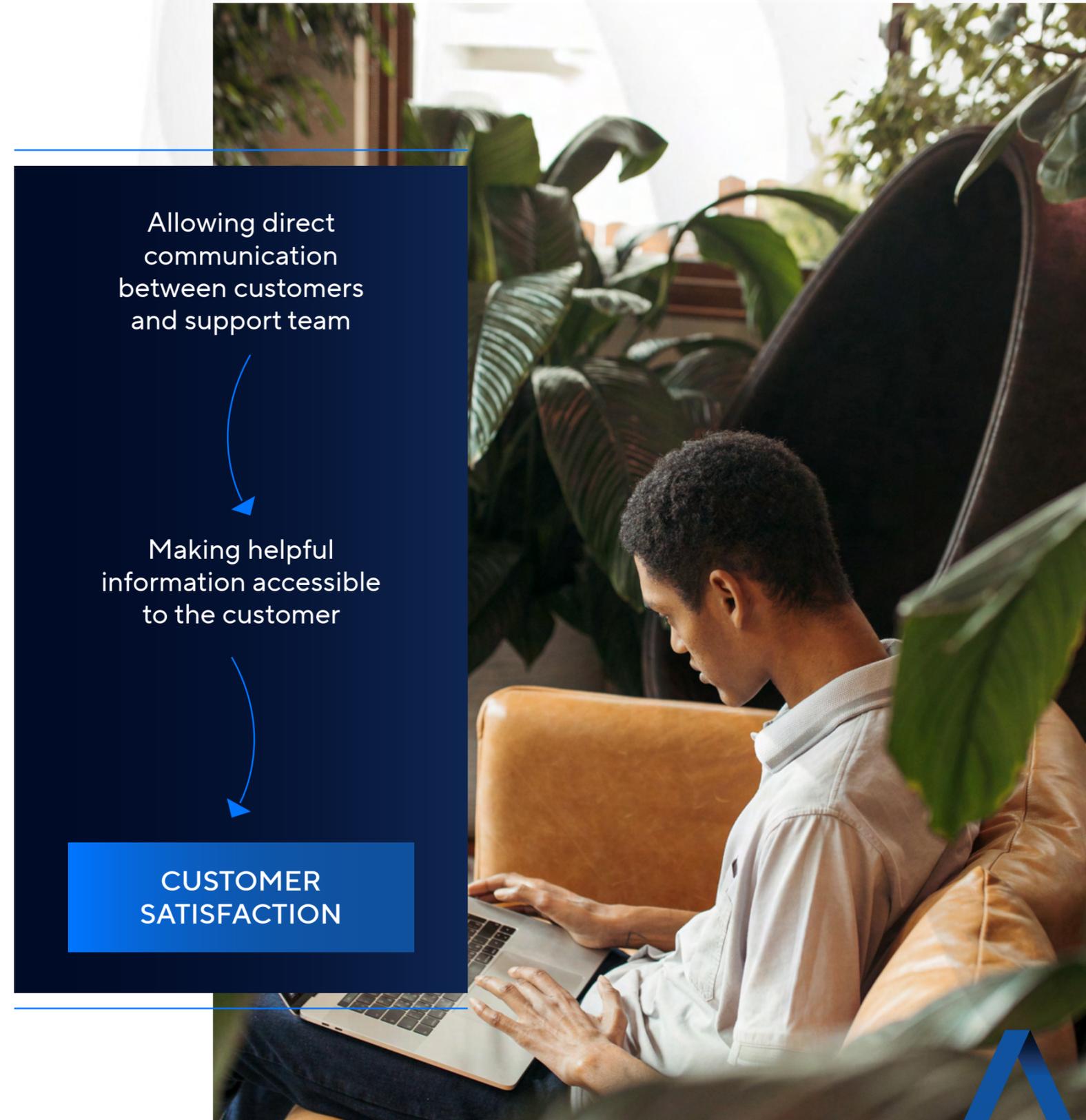
One of the central goals for any customer portal solution is to increase overall customer satisfaction. By properly meeting customer

expectations and allowing them to address issues in formats that they find comfortable and sensible for the task they need resolved, their experience is enhanced.

Increased customer satisfaction is accomplished by designing and implementing a customer portal that allows for direct communication between customers and a business' support team members while also making helpful information accessible. A well-considered portal increases overall transparency and trust between a business and the people that are most critical to enabling its long-term success.

Access to a customer portal helps bring customers deeper into a business' ecosystem and plays a critical role in helping to retain their loyalty over time. When a customer feels like they have convenient access to important information and can also resolve issues in a format that's conducive to their needs, they are far less likely to go elsewhere.

Access to a customer portal helps bring customers deeper into a business' ecosystem and plays a critical role in helping to retain their loyalty over time.



Customer portals can include:



solution resources



community forums



support chat functionality



overall interaction
with a larger customer
community

*All of these capabilities
help create an overall more
engaged customer base.*

Portals also provide the ability for customers to track their support requests and access answers or resolutions they received for past requests.

This decreases the probability that customers have to ask same support questions multiple times.

Customer portals also provide a home base for a business' customers to interact with relevant support and services teams.

An effective portal grants customers a secure place to track and manage their ongoing interactions - like support requests - which also provides reassurance that their communications are filed, and their requests are being tracked.

As remote work becomes the new normal, an organization's digital presence has increasingly become an extension of its brand and reputation. A well-crafted customer portal delivers a first-rate user experience (UX) so that a business' customers receive a digital experience that conveys competence, attention-to-detail, professionalism, and modernity.

Adept Dynamics creates customer portal solutions for our clients that focus on delivering excellent user-experiences for internal and external audiences alike.

When a customer feels like they have convenient access to important information and can also resolve issues in a format that's conducive to their needs, they are far less likely to go elsewhere.



ADEPT DYNAMICS'
UNIQUE PORTAL
CAPABILITIES



UNPARALLELED USER-EXPERIENCE DESIGN

One of Adept Dynamics' unique portal capabilities is our ability to pair cutting-edge front-end and UX design with optimized back-end development.

Other portal development teams build and implement portals with industry-standard presentation and User Interfaces (UI) – which is usually far inferior to the types of digital experiences most users expect. Adept Dynamics differentiates ourselves in this department through our ability to customize and manipulate UI to meet specific business requirements while also providing a UX experience akin to a well-designed and high performing website.

This is achieved by our team's unique capabilities: industry-leading front-end developers with decades of relevant front-end experience working hand-in-hand with our team of back-end architects.

We have the experience and knowledge of Liquid Language and Portals Web application programming interface (API), which we use to unleash the full creativity and expertise of our front-end developers (using HTML, CSS, and JavaScript) to deliver fully customized solutions.



*A recent survey from
TechJury found that*

50%

*of B2B inquiries are now
placed on mobile.*

To enable the UX from the back end, we command a master of the components and features native to Microsoft Power Portals, our primary technology platform for portal solutions.

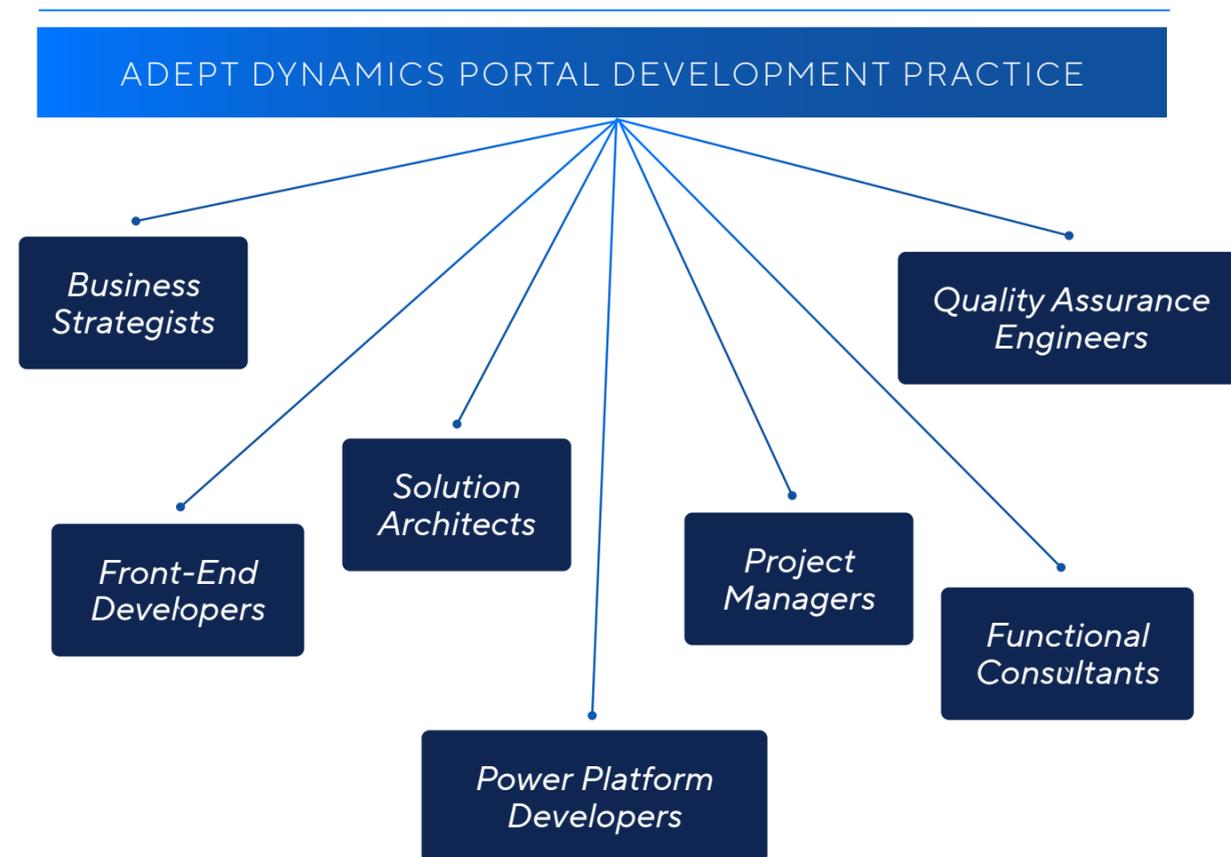
At Adept Dynamics, our core capabilities and skillsets are rooted in the lived experiences and professional backgrounds of our people. Our ability to deliver business defining portals is no different – our people provide our clients with solutions that aren't available anywhere else.

Through our industry leading UX portal capabilities, we also ensure that our portals are optimized for mobile use. A recent survey from TechJury found that 50% of B2B inquiries are now placed on mobile. With this trend only accelerating, it's critical that a customer portal is designed for a business' non-desktop users.



INTEGRATED TEAM

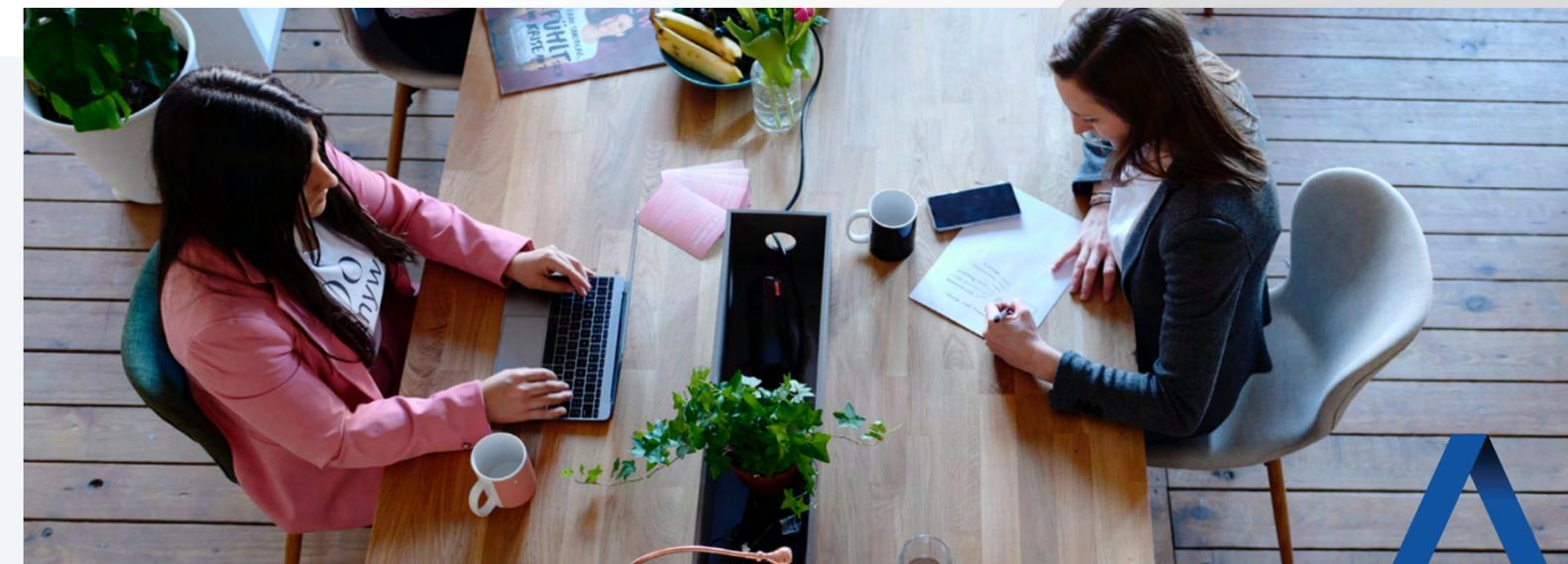
Adept Dynamics portal development practice consists of Business Strategists, Solution Architects, Functional Consultants, Power Platform Developers, Front-End Developers, Quality Assurance Engineers, and Project Managers.



With other development teams, clients only interface with a dedicated portal-specific team. However, if a portal project's objectives or requirements extend to other Microsoft Dataverse related elements, a separate team with the relevant Azure capabilities has to be pulled in.

At Adept Dynamics, we're a nimble shop and our team members' expertise is made available to every client project we take on. Any and all relevant skillsets that might be needed for a customer portal build are brought forward as opportunities are identified.

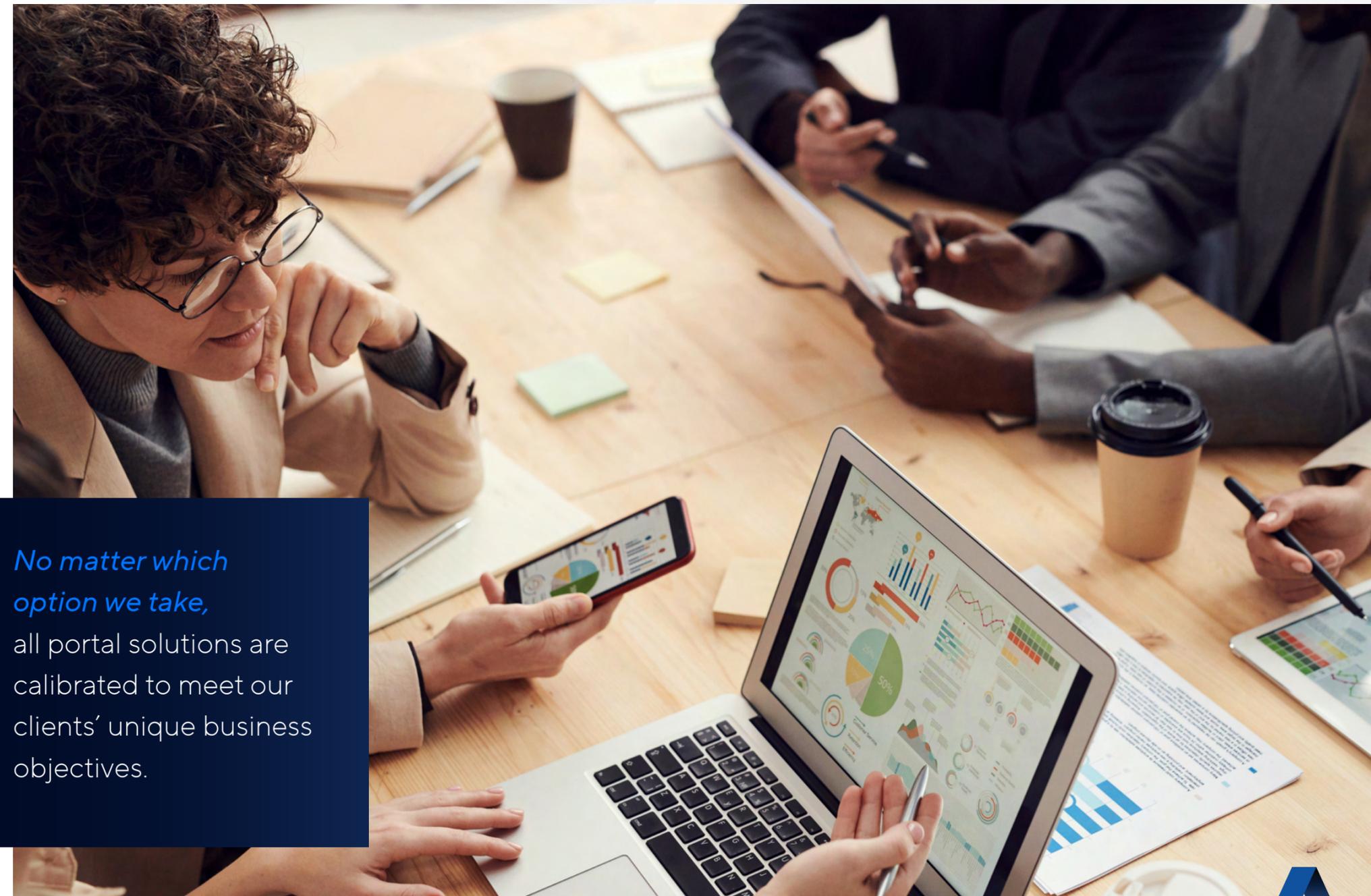
Our consultancy-first approach also positions our team to properly understand and account for how an organization's unique business process will drive a portal's business requirements. Our competitors are often development shops with tech-capabilities or large consultancies with diluted skillsets and an assembly line approach to portal construction. These large development shops also often try to force-fit their client's unique business processes and operating models against portal technology's out-of-the-box capabilities, as opposed to custom building the solution to enhance existing business processes.



STRATEGIC ENGAGEMENT CONSULTATION

While some clients already know which stakeholder groups they want to engage through a portal, many business leaders are unsure where to begin.

Adept Dynamics' portal experts offer in-depth strategy sessions to help determine how an organization might benefit from a portal solution. Through these fact-finding sessions, we determine whether an out-of-the-box portal solution, like Microsoft Power Apps Portal, will meet a team's requirements. If a custom solution is required, our team is proficient at working with our clients to gather all relevant business requirements, plan the implementation of the build, and develop on a sprint-based schedule that will meet the project's deadline.



No matter which option we take, all portal solutions are calibrated to meet our clients' unique business objectives.



ADEPT DYNAMICS PORTAL TYPES



PORTAL TYPES



CUSTOMER SELF-SERVICE PORTAL

A customer oriented self-service portal that allows customers the ability to access self-service information and user-support resources which helps to drastically reduce onerous and expensive customer support expenditures. Customer portals also allow users the ability to create and view their submitted case progress and submit experience feedback which strengthens customer loyalty and trust over time.



CLIENT PORTAL

A partner portal allows an organization's most important external stakeholders (distributors, suppliers, partners, regulators, etc.) access to designated information that's pertinent to them and their professional interactions with a business. Client portals make important business interactions simple while further integrating a business' most important external stakeholders deeper into their ongoing operations.



EMPLOYEE SELF-SERVICE PORTAL

An employee self-service portal is a significant, low-cost step towards a well-informed and motivated workforce. These portal help organizations streamline rote tasks and empower their people by offering easy-to-access and informative resources.



COMMUNITY PORTAL

A community portal leverages peer-to-peer interactions between customers and experts to organically grow the catalog of available knowledge using articles, forums, and blogs.



PORTAL FROM BLANK

Adept Dynamics can support our clients with a wide range of fully unique portal solutions; our team of platform development experts are experienced at creating wholly unique portals designated for both external and internal audiences.



CUSTOMER PORTAL IMPLEMENTATION ROADMAP

CUSTOMER PORTAL IMPLEMENTATION ROADMAP

A portal implementation project's success is largely determined on project success criteria being set and met. This path to success begins by defining the right criteria.

Accurate success criteria determinations can mean the difference between creating a solution that addresses an organization's needs, or creating a new process that maintains the status quo, or worse, causes harm.

To ensure that the most accurate, realistic, and productive success criteria is created and incorporated for a portal project's framework, Adept Dynamics utilizes a custom portal development approach that utilizes several distinct work phases. Some of these phases occur sequentially to one another while others run for the entire project duration. Each step in our process ladders up from one to the next, continually building on uncovered insights, stakeholder input, testing/quality assurance processes, and carefully calibrated success metrics. By following this proven implementation model that prioritizes rigorous requirements gathering at project start, achieving project success is significantly more attainable.

What follows is a process summary overview of Adept Dynamics' portal project approach.



DISCOVERY AND PLANNING:

The first project phase consists of business/process information gathering, stakeholder identification, and initial success criteria mapping. This requirements gathering & analysis phase is designed to uncover all necessary information required for Adept Dynamics and the client team to set accurate success criteria and ultimately ensure project success.

While the benefits of the requirements gathering & analysis are multiple and wide-ranging, the central output is clear and mutually agreed upon project success criteria. Success criteria, when correctly identified and adhered to, serves as an invaluable project framework from which all decision-making, development work, and strategic considerations should stem. Stakeholders from the client-team are also identified and formally selected during this phase.

Following the completion of all Requirements Gathering actions, Adept Dynamics creates a comprehensive Business Requirements Document (BRD) which provides a comprehensive blueprint to the web portal architecture and defines overall navigation. The BRD effectively serves as a blueprint for the upcoming development phase.



DEVELOPMENT:

Once all requirements have been gathered and the BRD has been drafted and approved by the client team, Adept Dynamics' development team begins work to bring the portal to life. The central goal of the development phase is to build a product that looks and feels precisely as the set business requirements dictate.



QUALITY AND ASSURANCE (QA):

Adept Dynamics' experienced QA team tests the portal application both during and following the development phase to catch any errors, missed requirements, or instability issues.

QA testing will take place across two separate testing sections, each with their own priorities and format:

STORY LEVEL QA: Testing that occurs during the development phase but only immediately after the completion of tasks that fulfill a specific user-case story. This testing work is conducted manually by the Adept Dynamics' QA engineers. Testing results of story level QA are submitted to relevant client team members for their review and approval.

PRODUCT LEVEL QA: Testing occurs after the completion of the project's development Phase. This testing accounts for all developed features/integrations to ensure that solutions meet the agreed-upon acceptance criteria outlined in the BRD.





USER-ACCEPTANCE TESTING (UAT):

Following completion of the Development phase, UAT will commence. The purpose of UAT is to validate system functionality and identify bugs which remain in the system following the internal QA process. This phase relies on involvement from Client Project Stakeholders and is crucial for ensuring the system meets their requirements and expectations. This phase will account for comprehensive end-to-end internal testing of both the Microsoft Dynamics 365 Customer Service and Microsoft Power Apps Portal platforms, based on the approved BRD. UAT should test both products against the success criteria defined in the approved BRD. UAT will occur until success criteria is reached (as determined by the Client). To keep the project on schedule, UAT should not exceed more than one-week (7 days).

Once UAT is complete, the Consultant will submit a report in PDF format detailing the outcome of testing and the Development actions executed as a result.

INTERNAL USER-ACCEPTANCE TESTING: Testing conducted by ADM employees and stakeholders to validate the proper function of the Dynamics 365 CS Model Driven App.

EXTERNAL USER-ACCEPTANCE TESTING: Testing conducted by ADM employees, stakeholders, and external stakeholders (optional) to validate the proper function of the Power Portal.



DEPLOYMENT AND REFINEMENT:

Once all issues are identified and resolved, the first version of the portal application is ready for piloting with key users.

If the portal meets the client's KPIs and standards, it's time to open it up to more users and monitor performance in real-time. Again, working with an excellent portal application development team like Adept Dynamics will ensure that a portal solution operates at the highest performance standards, is created on schedule and within set project budget parameters.

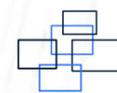
The development team's work isn't complete after launch. Maintenance and periodic updates are recommended to keep the portal in-line with external stakeholder expectations.



PORTAL
DEVELOPMENT
COST FACTORS

PORTAL DEVELOPMENT COST FACTORS

Like websites, portal development costs depend on various factors, including complexity, features, and functionality. Project cost depends on the specific functionality a team aims to achieve through the portal. Let's dive deeper into the factors that affect the price of a portal development project.



The number of features



Complexity and uniqueness of portal design



The type of tech stack chosen



The complexity of the portal logic



The kind of mobile experience required (PWA, cross-platform app)



Required performance and scalability of the portal



Number and complexity of integration with third-party libraries



Regulatory compliance requirements



Number of user roles



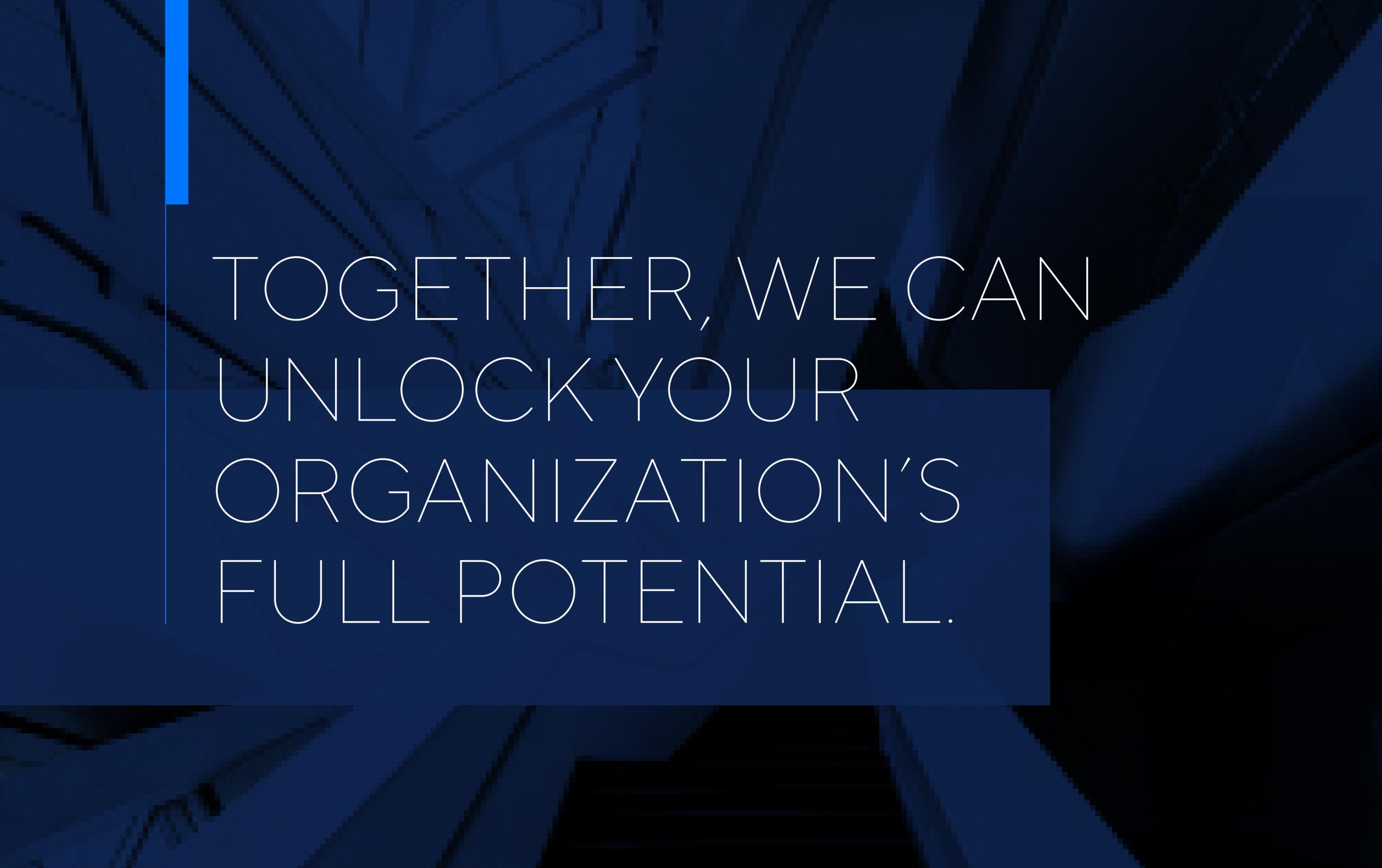
CONTACT INFORMATION

*Adept Dynamics can
help unlock business
transformation for
your team.*

Contact our team to learn more about
how our team can bring customer portal
solutions to your organization.

info@adeptdynamics.com





TOGETHER, WE CAN
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