ENTERPRISE PARTNER PORTALS

In this paper, we try to examine the challenges faced by partners, suppliers and customers of an enterprise while trying to access information which already exists somewhere but is not readily available.

We try to address these challenges through a partner portal that helps collate information and present to partners anytime, anywhere. We also provide details of the integration patterns available and their comparative study. A brief outline of portal governance is also shared in this paper.

The paper concludes by crystal gazing the future of partner portals

INTRODUCING PARTNER PORTALS

Information is the oxygen that enables all business decisions and helps enterprise take actions, make plans and execute projects. Technology helps information flow and makes it accessible wherever it is needed within the enterprise. Most enterprises work with a set of partners, suppliers and of course, customers who also need to share information. This information can range from marketing collaterals, access to data in the form of reports to transactional systems for executing requests and collaboration features like chat, shared document authoring, etc.

Conventionally, for small businesses, to fetch any critical information, the partner requests the information from a relationship manager. The relationship manger in turn gets this information from the subordinates who in turn get the information from actual personnel who are aware of the various systems where the information exists. The information is finally extracted in form of spreadsheets which are then used to collate data and create reports.

In other larger enterprises that use comprehensive IT systems to house this information, the complete information set is scattered on multiple, specialized systems. Most of the time, there is no single place for a partner to pull all the relevant information. The partner is expected to know or bookmark the URLs of several of these systems, at times, remember different user ids and passwords for these systems. Moreover, all these systems have their independent look and feel and offer totally inconsistent user experience for the partners.

This system of information sharing has following limitations:

❖ Information does not flow in real time and at times the data that reaches the partner, it is already outdated.

❖ There is a significant manual dependency involved in collating data from multiple systems and through multiple personnel.

❖ As a consequence of the above two limitations, there is a significant overhead of operational cost for supporting the information access.

Increasingly, enterprises worldwide are switching over to Partner Portals to aggregate and disseminate this information to their partners and customers. This involves setting up a centralized portal that fetches data from all the disparate applications and converts them into meaningful information that can be readily used by partners. Besides promoting self service amongst partners, this also provides faster access to up to date information. As a result, it leads to significant savings in operational costs and also improves the partner's experience of dealing with the enterprise.

In brief, the partner portal eases the information extraction and dissemination from various systems by:

1. Aggregating the data from multiple data systems.

2. Transforming the unstructured data into meaningful information.

3. Making the information available on the portal anywhere and at anytime.

4. Proactively notifying partners as new information becomes available.
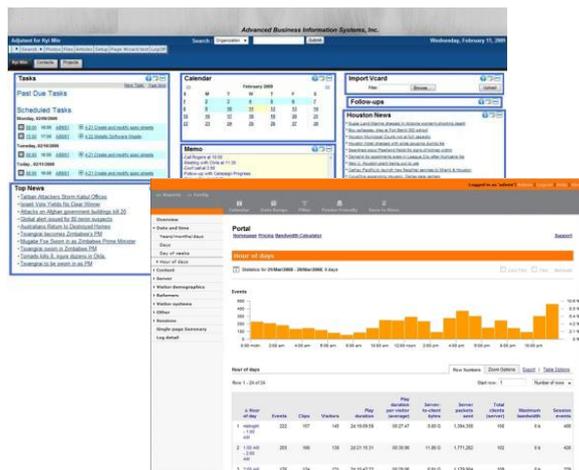
WHY PARTNER PORTALS?

Enterprises can achieve the following benefits by employing a partner portal for sharing information:

ANY TIME INFORMATION ACCESS

One particularly attractive benefit to partners is the flexibility to provide universal access to information. It is possible to use both "push" and "pull" technologies to ensure that partners have the right information available to them anytime and anywhere.

❖ Partners can choose to receive the information they want, when they want it, in the manner they prefer.

❖ Partners can configure the application to send notifications and updates at regular intervals.

❖ Partners can view information that is real time and up to date.

BETTER PRODUCTIVITY

With data readily available at the click of a button, the employees and partners can spend their valuable time effectively in other important activities rather than searching for data across various systems. Productivity is further enhanced by using the portal features like:

❖ Single Sign On – Partners login only once to the portal instead of multiple logins to the different applications. They also do not have to maintain a long list of credentials for different systems.

❖ Dashboards - Enables Partners to easily view and drill down on key performance indicators

Partner Portals can aid information flow between an enterprise and its partner, suppliers and customers. Besides reducing the operational costs and time needed to collect and disseminate information, partner portals can also offer a personalized experience for your partners and enable any time information access

PERSONALIZED INFORMATION

One of the greatest benefits that the Portal brings to its Partners is Personalization. Based on the Partner's geography, role, his/her predefined settings, the Portal can provide contextual and very specific information to that partner.

❖ Branding – Partners can be provided their own Branding, Logo etc based on their corporate specifications, thus making the partner feel at home while accessing the portal

❖ User specific information – the information presented on the portal can be personalized to user logging in.

❖ User customization – partners can customize the look and feel of the portal to control how the information is presented to them.

REDUCED OPERATIONAL COST

For companies that heavily depend on employees to search for and collate information, partner portals promise big savings by automating the entire process of fetching the right information and hence nullifying the need for manual intervention.

❖ No middle men – partners need not call up individuals to get status updates

❖ Lesser paper work – where information is generally preferred in form of paper documents and print outs can now look up to the portal for information

❖ Single source of truth – With standardised processes in place, information flows directly into the systems from where they are retrieved rather than be shared and searched on mails

THINK TWICE, INTEGRATE ONCE!

The key difference between launching a new web system or a Portal and launching a Partner Portal is that while you need to develop new features for the former; the latter is more about quickly stitching together what you already have. As such, Partner Portal implementations are largely integration driven. A Partner Portal implementation follows a well defined process of understanding the portal vision, analysing the applications to be integrated and choosing an integration pattern that meets the business needs.

The integration approach warrants a selection of integration pattern because of the complexity involved due to the number of applications involved and the diversity of technologies that they are built on. Further, these applications reside on different platforms and are handled by different teams. The application specific skills and the technical knowhow of the application reside with only a few individuals who manage them. Over the years, the following key integration patterns have emerged as the de-facto means of integrating applications:

WEB SERVICES BASED INTEGRATION

Using this form of integration, the partner portal components extend the application that reside in a remote location and makes it presentable on the portal through programmatic access. The partners are not exposed to the individual applications directly and are agnostic to the number of applications involved.

Pros

❖ Consistent look and feel across the entire portal. UI can be customized extensively

❖ Partner interacts only with the portal and is not concerned about the underlying applications

❖ Portal can slice and dice data from multiple applications at the same time to show meaningful information

❖ Dashboards and Reports can be customized since the portal directly works on the data

❖ Authentication is handled only by the portal; the individual applications need not authenticate the user since partner never interacts with these applications directly.

Cons

❖ Needs thorough understanding of individual applications

❖ The applications will have to be modified to expose the data in form of web services.

❖ Needs time and effort from the individual application owners

❖ Application owners might resist changes to the applications

MASHUPS

Mashups quickly aggregate applications running in different environments and bind them using a common authentication, authorization and user interface layer. The underlying applications are required to make some changes for authentication and for a slightly better user interface for mashup integration.

The partners directly interact with the individual applications through the portal. There are no URL redirects and the partner has the luxury to view all applications next to one another. The applications can also share some common data amongst each other.

Pros

❖ No URL Redirects

❖ Multiple applications available to partners at the same location

❖ Applications can be customized such that the partner is authenticated only once, the individual applications do not need to authenticate users again

❖ User only needs to remember one credential to access multiple applications.

Cons

❖ Lack of common User Interface – the UI can be skinned to some extent, however each of the applications continue to use their own UI

❖ Even though the applications are embedded on the portal, there is still no consolidation of data / information. The individual

Since partner portals are primarily integration driven, due diligence should be done before selecting the correct integration strategy that is aligned with the enterprise vision.

DIRECT DATA INTEGRATION

The main difference between the Web Services based integration and direct data integration lies in the fact that in the latter, the individual applications do not expose any web services; instead the portal directly fetches data from the application database. Like in web services integration, partners are not exposed to the individual applications directly and are agnostic to the number of applications involved.

Pros

❖ Consistent look and feel across the entire portal. UI can be customized extensively

❖ Partner interacts only with the portal and is not concerned about the underlying applications

❖ Portal can slice and dice data from multiple applications at the same time to show meaningful information

❖ Dashboards and Reports can be customized since the portal directly works on the data

❖ Authentication is handled only by the portal; the individual applications need not authenticate the user since partner never interacts with these applications directly.

❖ Applications need not make any changes since data is fetched directly from the database

Cons

❖ Needs thorough understanding of individual applications

❖ The portal is very tightly integrated with the application and any change in application can impact the portal functionality

❖ Needs time and effort from the individual application owners to explain the data model

LINKS BASED INTEGRATION

This is the simplest form of application integration in which the applications continue to function as they are; there are no changes either in the application team or the application itself. Integration is provided through links to these applications on the portal. These links can be configured to open up the applications in a new or the same browser window.

Pros

❖ Easy to implement

❖ Quick time to deploy

❖ No need to understand the applications

❖ Application teams continue to work on the applications as usual, there is no new learning required

Cons

❖ No standardised User Interface – the applications will continue to use their own UI

❖ No consolidation of data / information. The individual applications will continue to hold and own the information.

❖ Each application will have its own authentication mechanism, partners will have to login into the applications independently

❖ No interaction or sharing of data across applications, the portal does not provide a dashboard view of these applications

❖ Lack of optimal User Experience for Partners
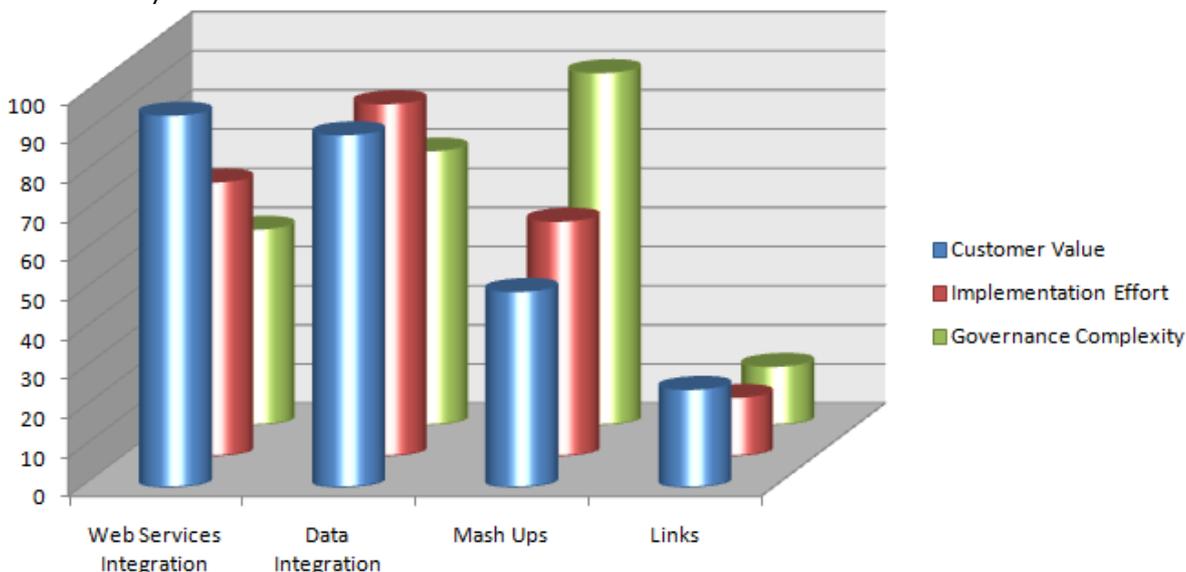
COMPARITIVE ANALYSIS OF INTEGRATION OPTIONS

	Links	Mash ups	Webservices	Data Integration
User Experience is key to the success of the portal	🔴	🟡	🟢	🟢
The Users of the portal should be unaware of the underlying applications being used	🔴	🔴	🟢	🟢
Portal needs to slice and dice the information and provide dashboards	🔴	🟡	🟢	🟢
Time is a constraint	🟢	🟡	🔴	🔴
Users are clients or customers of the company	🔴	🟡	🟢	🟢
Portal is to be very User Friendly	🔴	🟡	🟢	🟢
Customers need to be provided with an experience that they feel privileged	🔴	🔴	🟢	🟢
Individual application teams are not available to expose web services	🟡	🟡	🔴	🟢
Individual application teams are not available to explain the data model	🟡	🟡	🟢	🔴

INTEGRATION APPROACH SELECTION CRITERIA

PORTAL GOVERNANCE

Portal Governance is a vast topic in itself and is not covered here; however it is worthwhile to mention the need for Governance in relation to a Partner Portal.

Irrespective of the integration pattern that has been chosen, one important aspect of creating a Partner Portal is to establish a well defined Portal Governance model. It is not unusual for a partner portal implementation to go through turbulent weather; not due to technology but due to lack of proper governance.

Portal, by its nature of implementation, involves multiple teams with varied interests who need to work together on a range of issues like User Interface, Dashboards, personalization, portal content etc. This leads to a "joint ownership" model which, if not regulated, will lead to a lot of people driving different aspects without much sense of ownership. Governance engages people and enforces processes in order to build an effective portal.

In brief, Portal Governance:

- ❖ Identifies the different constituents of the Partner Portal (UI, CMS etc)
- ❖ Identifies the roles (content author, developer, UI designer etc)
- ❖ Identifies the different functions (Content Authoring, portal deployment etc)
- ❖ Sets up processes that define ownership regarding what roles would execute which functions and on what constituents.
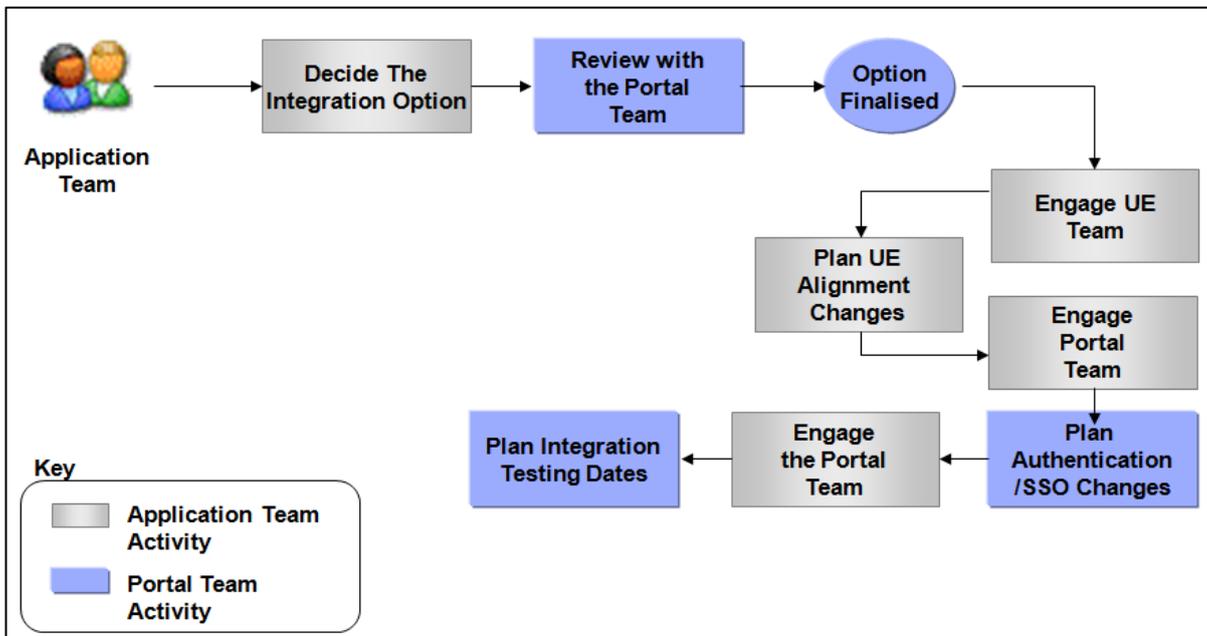
FUTURE OF PARTNER PORTALS

The first step in an enterprise's quest for information dissemination to the partners is to "enable" them for "online" access. The next step will be to enable information access and transaction "on the go".

As the trend for internet access moves from large screen devices to tablets and mobile phones, it won't be too late to think-ahead and plan for a mobile-ready partner portal. Taking the partner portal mobile will do a world of good to the already "mobile" partners who are accessing almost all their internet needs sans a laptop/desktop; it could mean ease of access to the services offered and a better experience for them at the same time, it can offer faster pace of business growth.

Services like Dashboards and Reporting which are offered as part of the partner portal are most needed to be available on mobiles for analysis during business meetings on the go or to use for offline discussions. Collaboration services, if offered as part of the portal, can seamlessly be integrated with mobile collaboration and social networking apps.

With mobile applications gaining more and more traction, the future of partner portals could also be to offer the partner services as mobile applications for a richer user experience on mobile devices. This also provides the capability to leverage the mobile OS functionalities, to offer Push notifications as opposed to email-notifications to ensure timely attention to tasks.

Just like any web portal, the options for a future Partner Portal are endless, but the sheer existence of one, can transform the way partners relate to you, collaborate with you and take full advantage of the services offered by you and feel special.

IN CONCLUSION

A partner portal is not a silver bullet in itself. It is not going to end all your partner woes but it is definitely a first step in addressing the issues normally encountered in information access, or lack of it.

Successful partner portal implementation needs meticulous planning and disciplined execution. It needs serious and committed involvement of multiple teams to achieve a common goal. A mature governance model needs to complement the project execution and facilitate joint ownership.

Once successfully rolled out, a partner portal can enthuse your partners and enable you to do more business with them with reduced overheads. It delivers high return on investment and can put you in good stead in the eyes of your customers, suppliers and partners.