A Guide to Transitioning from Paper to Web Portal

allsop

Introduction

With just over 60% of the working day spent on productive activity,[1] businesses have never been so focused on improving processes and procedures to deliver key efficiencies.

A more productive and proficient workforce is a common goal for every business and with 57% of office workers spending an hour a day looking for missing documents.[2] The transition from paper to digital to equip employees with data, information and the knowledge that they need to do their jobs effectively has never been more important.

Over our eighteen years of introducing bespoke software and systems for organisations. We have experienced first-hand the shift to data driven businesses where access to real time, relevant and reliable data can be the making or breaking of a company. We are proud to have worked alongside a large range of companies to deliver systems that enable them to thrive and grow in a turbulent and changing landscape.

Our experience and our passion for delivering solutions that are customised and can grow with your business have been combined to develop this guide for paper to portal success.

This guide will lead you through the challenge of selecting the right portal from scoping your project to seamless integration covering the key aspects for consideration along the journey.
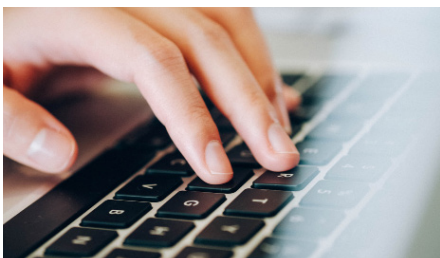
Only 60%
of the working day is productive

<1 in 4
companies have document management in place

57%
spend 1 hour per day looking for missing documents

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1   Microsoft Office Personal Productivity Challenge
2   Unlocking the UK's 'Daily Savings Time'

What is a business portal?

A business web portal, put simply, is a central location where information is uploaded, viewed and edited. This allows for improved communication and collaboration between your employees and business partners.

Based in an online environment it can be accessed anywhere and on any device. Employees, suppliers, subcontractors or customers, where relevant, will have access with varying levels of functionality based on the tasks that they need to complete on the portal.

A business web portal can come in many different forms, including but not limited to, a supplier or subcontractor portal, a customer portal or a company intranet. Although the functionality of each of these will be different the overall goal is the same. To improve communication and create centralised access to information, whilst streamlining everyday admin tasks.

Let's take supplier portals as our example. By introducing a supplier portal, you can decrease the time your employees spend on the admin that is associated with managing a range of different suppliers.

For your employees, all information required from each supplier is available in one place. This can include documentation, order fulfilment and delivery information. For suppliers, they now have self-service access to any information they may require. This can include purchase orders raised and the ability to track the status of a submitted invoice. By having this information in a self-service, online environment, suppliers have access anytime without having to email or call your business. Thus putting less strain on your resources.

Types of Portals

As mentioned above the three main portals available are a supplier or subcontractor portal, a customer portal or a company intranet.

Let's have a look at each of these to understand the common problems and frustrations they will overcome once introduced into your business.

A Supplier/Subcontractor Portal

If your business manages a large range of suppliers or subcontractors. From a management perspective, you can see that your staff are feeling frustrated with the admin work associated with managing suppliers.

They spend a lot of their time dealing with queries from your suppliers via email and phone calls. Not only this, but as most information is being held in employee's inboxes you are unable to get a bird's eye view of how the business is performing. A supplier portal eliminates the need for back and forth email with your employees as information is available online. This enables improved day to day productivity for your employees.

The portal also provides a central location for dashboards and access to vital information. This empowers your employees as well as allowing managers to make data driven decisions based on reliable information.

A Customer Portal

The expectations of your customers are constantly rising. Customers are now frustrated if they are unable to find a resolution to an issue or information online.

A staggering 92% of consumers in the UK expect an organisation to offer a self-service customer support portal or FAQ page. [3]

Customers want responses to their queries almost instantly. Providing them with an online portal where they can track and update orders and read FAQs helps to deliver instant access without putting extra strain on your employees. Research concludes that in the UK 97% of consumers consider customer service to be important in their choice of and loyalty to an organisation.[4] This means providing excellent customer service is vital for you to remain competitive within your market.

Company Intranet

As your business grows and expands it can become more difficult to manage internal communications. Combined with a shift towards remote working this problem can be worsened. 54% of office workers are now currently able to work remotely.[5] Addressing this issue many companies have chosen to introduce a company intranet to improve internal communication. Your intranet may include bulletin boards, dashboards for reporting, calendars and staff polls. Introducing a company intranet ensures everyone is kept up to date and can also encourage innovation with the increased sharing of ideas and knowledge.

The Benefits

There are many advantages of introducing a web portal into your business. The three key benefits covered in this guide, however, are compliance, efficiency and reduced costs.

Compliance

Improve and streamline the processes involved with ensuring that your business is compliant with all regulations in your industry.

Storing all information in one place, gives increased visibility making it easier to guarantee that all compliance regulations are being met. Central storage of information also allows for easy access in an audit situation.

Within the portal, actions can be traced to the username of your employee, therefore, you have increased accountability throughout your operations. Actions can also be set up in the software as mandatory or it can include prompts and reminders about regulations to your staff.

In the example of the supplier or subcontractor portal. Compliance can be enhanced with your subcontractors by providing all the necessary health and safety forms and processes that need to be followed. These forms are completed and uploaded back to the portal so a full record is maintained.

3   Microsoft, Global State of Multichannel Customer Service Report Page 10
4   Microsoft Global State of Multichannel Customer Service Report Page 14
5   YouGov, Working Remotely

Efficiency

Increased efficiency will be achieved by automating your basic administration tasks through the portal. For example, with the introduction of a business portal, the need for data re-entry can be completely eradicated.

Improving communication with the introduction of your business web portal will also increase efficiency. On average an employee spends 13 hours a week reading and responding to email.[6] That's by far the most time-consuming work activity at 28% of their work time. By offering self-service access to information you reduce the need for emails from suppliers and customers. This frees up your employee's time. Allowing them to focus on more productive tasks rather than answering basic queries.

Reduced Costs

Reducing the admin burden , means that employees can complete all their tasks efficiently and therefore eliminates the need for overtime.

Training time and costs will also be reduced. If you choose to purchase a custom developed portal, it will be built based upon your current procedures. Therefore, it will be a quick training period to get your current employees comfortable with your new portal. Not only this but moving to a more intuitive online portal decreases the time spent on training for new employees.

Results

Based on experiences with our clients these are some of the key improvements that have been achieved by introducing a web portal.

Key improvements:

- **Improved communication and collaboration** - due to information becoming more accessable and ideas being freely shared across the business.

- **Improved service to customers** - due to providing self-service online access. As well as this employees can deal with any queries more efficiently as they have access to real-time, relevant data.

- **Improved relationships with suppliers** - introducing a supplier web portal provides an easier, more streamlined process for your suppliers as well as self-service access to important information.

- **Easily meet compliance and standards** - with increased accountability and traceability, compliance naturally improves among staff. We have supported one of clients with a customised web portal and mobile solution that has resulted in a 75% reduction in insurance claims.

- **Improved efficiency** - reducing the time spent on unnessecary admin and non-productive duties, has allowed our clients to re-deploy staff to more important tasks.

6   McKinsey Global Institute 'The social economy: Unlocking value and productivity through social technologies.'

Next Steps

Planning your Portal

Your first step is to carefully scope out the features and functionality that the portal needs to have. Taking into consideration the tasks that are currently the most time consuming. These tasks will take priority in terms of automating or streamlining the processes involved in completing them.

You also need to consider the current systems you use across your whole business and how your new solution will need to integrate with these. Careful planning of your portal ensures that your solution has the scope and flexibility to grow further as your business grows.

During the planning stage, it is a good idea to include your employees. Your employees are going to be using your new software every day so it is important that it addresses the 'pain points' that they have with your current system. Involving staff at this early stage will also help to increase employee buy-in when it comes to implementation.

Another area to discuss is the impact you expect the introduction of a portal to have. A clear objective of what you want to achieve and a way to measure it is important. This is because it will enable you to evaluate the success of your project after implementation.

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The planning phase of a web portal is the cruical stage where we define the key purpose and end goal of the web portal.

The inclusion of key stakeholders and their needs at this stage of the project has a massive impact on the end product. "

Richard Campbell
Allsop Consulting

Budget and Timeline

An agreed budget and achievable timeline for the introduction for your business portal is vital. Having these decided before you select your software partner will make the search a lot easier.

Choose your software partner

Once you have a clear idea of what you need your portal to do you can start to research your software partner of choice. Choosing the right software partner for your business is important for the success of your project. Especially when considering that only 25% of IT executives are confident that their projects will be successful.[7]

It is a good idea to ask about previous work they have completed to get a feel for the type of solution they will deliver. Being able to work collaboratively with your software partner is vital to ensure you get a solution that works for your business.

Build

During the build of your solution, you should be kept up to date with progress. By maintaining communication throughout, you can ensure that any changes to the original scope can be included and that the work is meeting your expectations.

7   Geneca 'Doomed from the Start? Industry Survey'

Solution Delivery

Once your portal development is completed, you will be walked through the portal solution to ensure that all original goals have been met. If good communication has been maintained throughout, however, this should be a quick and very rewarding process.

Conclusion

As the strive for more efficient processes and a more productive workforce continues. It is inevitable that the majority of businesses will ditch their outdated paper processes and begin their digital transformation.

Switching to digital with the introduction of a web portal can bring many advantages to your business. As discussed in this guide you can improve efficiency, compliance and reduce costs throughout your business. This enables you to remain competitive within your industry. As well as keeping your employees, customers and suppliers happy.

Achieving these goals is simple if you have a carefully planned project and work closely with a software partner you can trust.

About Us

We are based in Belfast and over the last 18 years we have worked with a wide range of clients to deliver a range of custom business portals that focus on improving the flow of information and how knowledge is shared within their business. We ensure our portal solutions deliver to save our customers time and money, while producing efficiencies that enable their business to grow further. At Allsop, we work with all our clients to understand their businesses from the ground up. Building on the assets that you already have, to minimise the process of change, whilst maximising its impact.

Our Clients

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