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???Jeff Aaron



Self-service is essential to the future of customer experience (CX). This was true before the pandemic hit as businesses sought ways to save money and improve efficiencies by making it possible for customers to manage certain tasks themselves, usually online. But self-service has become especially important as the era of social distancing has taken hold and we've seen a massive shift to online living. It's impossible to ignore the rise of self-service in industries ranging from quick service dining (if you've been using McDonald's kiosks or the Starbucks mobile app in the drive-through lane, you know what I mean) to healthcare (e.g., patient portals). Self-service is also catching on with partner portals, which businesses use to manage their relationships with suppliers and other companies they rely on or provide services to. But this is not necessarily a positive trend. Self-service can damage a brand if done poorly. The key to making a self-service partner portal succeed is to make it lovable.

Definition of a Partner Portal

In simple terms, a partner portal consists of an online platform that gives your partners access to the various resources they need to successfully market, sell and support your products and services. These resources can include marketing assets, pricing and sales information, technical product information, training videos, contact information, and more.

A well-constructed and designed partner portal can give your business a big leg-up over your competition. Like everything else these days, people are looking for friction-free experiences. They expect fast answers and quick access to information at all times. Nobody likes to be put on hold, or have to wait for standard business hours anymore. Customer expectations have changed, and businesses need to keep pace.

When we learn that our clients consider their partner channel to be a vital component to their sustained growth, usually the first question that follows is “how are you supporting your partner community today?” We’ve helped several clients better support their partner community, build loyalty, and grow channel revenue by either implementing or optimizing their partner portal and digital self-service platforms.

The Human Touch

The key to making a partner portal succeed is to address a basic human need: we want to do business with other people and businesses that make our lives easier. Human beings naturally gravitate towards the path of least resistance. So, it stands to reason that today’s businesses should strive to become a company that is easy to do business with. Providing fast answers, quick access to information, and simplifying processes by providing an always available partner resource is one way to achieve this.

Is Your Partner Portal Lovable?

Designing a partner portal requires asking many questions beyond the scope of this post. Here’s one that you absolutely need to ask, though: how might you make your portal lovable? Yes, lovable. Not just functional but lovable, as in the kind of experience that people want to use, not just have to use. And why not? Behind every visit and click on your portal is a human being trying to accomplish a task that will ultimately benefit *your* business if you make it easier for them.

At Centific, our approach to portal implementation and optimization always starts with our goal of delivering lovable experiences for intended users. To do this, we go through a series of tasks and research to help get inside the head of your customer/user. What’s important to them? How can we make their lives easier? Save them time? And that’s just for starters.

We look to understand current processes so that we may identify sub-optimal flows, and propose new more-efficient and enjoyable experiences. This could include everything from introducing simple sign-in, mobile experiences, personalization, multi-language options, content recommendations, intelligent chat-bots, multimedia, access to key systems such as deal management and customer support tools and more.

Offering useful features, up-to-date content, and an intuitive interface all contribute greatly to providing rewarding experiences for your users. Understanding key systems, integration points, and business processes, also help to determine the optimal technology platform and infrastructure. There

are a lot of great technology platforms out there on the market today, but not a single one that will fit every customer like Cinderella's slipper. Even when "off-the-shelf" platforms are utilized, they almost always involve some element of custom development in order to deliver optimal experiences.

Being a company that is "easy to do business with" can help to build loyalty, longevity, and even profitability. And depending on the industry, just offering digital self-service experiences can give you a distinct competitive advantage.

How to Get Started

All the questions we ask when we design a partner portal can be addressed in a rigorous process known as a design sprint. Design sprints are engineered to put people at the center of product development, which increases the chances that the end result – such as a partner portal! – will be lovable.

Design sprints matter because of their ability to make a business more empathetic to the emotional undercurrents of the people these products are being designed for.

We incorporate design sprints into our FUEL methodology, which combines tools such as design sprints with product development approaches such as lean innovation. (FUEL was developed by our Moonshot innovation outpost, based in Chicago and part of the Centific organization.)

To learn how to get started creating lovable partner portals or digital self-service experiences, contact us. We know the terrain and can help.

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