INGENIUX

12 Elements of a
Unified Portal

Contents

A unified content portal enables organizations to bring together all content from across disparate systems and information silos, models business processes and workflows and provides a central hub for customers to access and manage their information. It can maintain or add intelligence to content so that it can be re-used in a variety of situations, both within the portal and by publishing the content to other delivery channels, digital and print-based.

Your implementation will be very different from someone else's; you have different business processes, workflows and systems to integrate. An out of the box solution isn't going to give you the flexibility and customization you need to create the seamless and consistent customer experiences you require. But there are key capabilities you need, and we've covered these in the sections below.

What is a Unified Portal?

A unified portal is a designed to deliver your customers (members, clients, partners, etc.) all the information they need to be successful.

A unified portal unifies the customer experience in a single, seamless environment. It aggregates information from across disparate systems and information silos, models business processes and workflows, and provides a central hub for customers to access and manage their information.

At its foundation a unified portal:

- Unifies content, reduces complexity and improves the experience. A single place to access support tickets, technical documentation, knowledge, learning and training, product information, service information, reseller and partner information and customer information.

- Provides a personalized experience for each customer, showing information relevant to them, but also allowing the customer to search for additional information when needed.

- Increases loyalty and retention. Access to information and increased visibility improve customer satisfaction and enable customers to have more meaningful engagement with your brand.

- Generates new sales. Before a customer engages sales, they spend a lot of time researching and validating products and services, and many look to other customers for their opinions. A portal gives existing customers the opportunity to promote your products, helping to generate new sales.

OTB Portals Don't Work

A unified portal is not a point solution, and it's more than a database of content. But it's also not an out-of-the-box solution that you can quickly plug and play.

The very nature of unifying multiple sources of content, integrating multiple applications, modeling unique business processes, and engaging users with your brand pretty much excludes "out of the box." Are your business processes out of the box? Then how can you have a pre-built portal?

It is about modeling your organizations business process – this by its very nature is not delivered in a pre-built approach.

The Right Partner to Build a Unified Portal is Key

There are several essential elements to your unified portal strategy and plan:

- Business Process Modeling
- Information Architecture
- Taxonomy and Classification
- Graphic Design

It is important to have a solid strategy going into a project like this. Find a partner who understands your needs and has experience designing and building unified portals. Ask them how they have solved this problem before and request examples.

The Key Elements of a Unified Portal

There are twelve key elements of a unified portal. Let's look at each of these.

1. Intelligent Content Model

Content is located in a number of different systems. It could be Microsoft Word, a component content management system, using DITA or somewhere else. In order to make this content available to customers you will want to make it available through your unified portal. But it's not as simple as just importing the content; you need to retain its intelligence. This intelligence is found in the structure of the content and its associated metadata.

Not all content is intelligent however. Unstructured content, like Word documents and emails, don't have much intelligence. In this case, when you import the content into the portal you'll want to add value and intelligence to the content – through structure and metadata.

An intelligent content model supports the ingestion of both structured (intelligent) content and unstructured content. It either ingests the structure and metadata, or it creates it using a defined content re-use model.

When you define an intelligent content model, you can easily re-use the content for multiple sites, channels or use cases, publishing it in the format required for each delivery channel. You don't worry about presentation – the presentation layer has the responsibility of displaying the content appropriately.

An intelligent content model has a number of benefits including:

- Flexible development and evolution of the content
- Scalability of content for humans and machines
- Lower total cost of ownership of content

2. Headless Publishing

With decoupled publishing, the delivery tier is separate from the management environment where content is created or curated. This publishing model enables you to publish content to diverse types of delivery tiers including websites, web-based applications, mobile apps, kiosks, and print publications.

The very nature of a unified portal requires flexibility for design. You want to design the portal experience around your business processes. You need this flexibility to alter the presentation layer to support those processes.

3. Content as a Service

Content-as-a-Service, or CaaS, is a strategy for delivering content to an external website, applications like Salesforce, ecommerce and transactional applications, in-line help, and display (Kiosk) apps. With CaaS you can manage and edit your content in a unified portal and when you need to, push it out as a resource file into an external application, or the application can request content using an API-based web service.

Managing all your content in a unified portal empowers your business and marketing teams to update in-app content easily, translate content into multiple languages, personalize the content based on business rules or audience, or enable self-service for third-party customers of your applications.

4. Search

Search is a critical capability for any application. It is often the primary navigation for users – research indicates that 30 to 70% of users start with performing a search. Unfortunately, search success is proportional to content complexity, which makes it important to offer the right search capabilities.

In a unified content portal there are several types of search approaches that are useful:

- **Onboard search** – enables searching content within the portal

- **Federated search** – provides the ability to search external applications and repositories. Federated search requires a permissioning and access model to ensure users only have access to the information they can access. It also requires diverse indexing capabilities

and segmentation and unification of search results.

- **Faceted (guided) search** – enables the filtering of search results by taxonomy and metadata, guiding users and improving content findability.

- **Context search and filtering** – allows users to search specific sections or types of content – often known as search-based navigation. Users can also filter search results by metadata and taxonomy – called pivoting faceted search.

5. Multi-Format Output

A Structured Content Model enables you to bring all your information into a single location and share it with your customers, but it also enables you to deliver that content to other channels, including third-party applications or partners. Content can be site-specific – with lines of business re-using content for their sites, or you can syndicate it across multiple external sites.

Because the content you have in the unified content portal is intelligent and structured, and the portal supports delivery of content as a service, you can publish the content

in specific contexts, to specific devices or media, and in multiple languages.

You can publish content to:

- The web in all its formats (website, web application, mobile), including both responsive and adaptive mobile delivery

- Publish to Print (PDF, Word, In-Design)

- Email and other forms of digital communication.

Multi-channel content delivery requires a decoupled publishing model and a modern API.

6. User Authentication and Management

The unified portal must provide secure authentication of users and the ability to establish rights and permissions to both the portal and the content within the portal.

Authentication can be done through integration with Active Directory, LDAP, Central Authentication Service (CAS) or a host of custom providers, or the portal can provide security directly. A unified portal should provide cascading authentication,

enabling it to utilize multiple identity providers to manage access and group-level security in the portal.

By applying permissions by Role or Group, you can easily manage access to content within the portal, as well as access to systems and content integrated with the portal through single-sign on.

7. Taxonomy Manager

Taxonomy Management is focused on metadata. Metadata is crucial in the delivery of personalized content delivered to the right person at the right time.

A taxonomy manager enables you to categorize content based on business processes or the content consumption model. You can define the metadata to apply and either manually or programmatically apply that metadata.

The categorization of content is what enables you to re-use that content in different ways and locations, both programmatically and editorially. You can also leverage taxonomy to personalize or target content and guide users to the information they need.

8. Configurable Workflows

One of the drivers of a unified portal is the ability model the portal using existing business processes and workflows. A built-in workflow tool enables administrators to easily map your existing workflows in the portal, or create new ones that improve the usability of content.

A unified portal can connect to enterprise systems and cloud applications such as Salesforce, Microsoft Dynamics, Oracle, SAP and many cloud-based point solution, allowing you to pull in data from those systems and use it in your workflow processes.

9. Structured Authoring Environment

To create content that is easily reused and repurposed, a structured content authoring model is ideal. Structured content is intelligent – it is categorized and annotated with a metadata model that describes what the content is, how it's used and for whom. When you add content to the portal, you can add structure to it to support both personalization and easier delivery to the right channels and audiences.

10. Community

Community is often an important element of a unified portal. It allows customers to share insights and personal experiences on the company's products and services and ask questions from people who use the products.

Collaborative and community capabilities to empower your customers to help and learn from each other, including capabilities such as:

- User-generated content, feedback, and interactions
- Forums
- Blogs
- Topic and Interest Groups
- Ratings, Rankings, and Comments
- Surveys
- Alerts
- Notifications
- Forms

Community features are proven to lower support costs and improve customer loyalty and retention. They can also support cross-selling and upselling opportunities.

11. Modern API

To enable a unified portal, you need a modern API available as both SOAP and REST. The data in a unified portal is often drawn from many different systems, so there needs to be flexibility and scalability to ensure that this content is imported effectively.

This API should use a modern object structure and naming conventions to ensure it's easy to use and incorporate into the development of other applications. It also should be both session-based and transaction-oriented, and support multi-threading for high-performance applications.

12. Adaptive Mobile Delivery

Most of the time we talk about the need to support responsive design for mobile content delivery. It's important to understand that responsive is a tool, it's not a strategy. It's one intelligence layer you can implement and is a good baseline.

However, not all technical content resolves well in responsive, so you may not be addressing the entire user experience when you choose only to implement responsive.

Adaptive mobile delivery is another approach to deliver content for mobile devices, one that many organizations are turning to create personalized and targeted experiences. Where responsive design adjusts the presentation based on screen size, orientation, and platform, adaptive mobile delivery is more specific, detecting the device requesting the content (and potentially the user) and adapting the presentation accordingly. These changes include both how the content is presented, but also how much and in what form.

Bridging Information Silos and Unifying the Customer Experience

Enterprise delivery of support and learning content is now being recognized as a core driving factor of good customer experience. Customers, partners, and internal staff are asked to look at multiple systems with multiple logins and interfaces. Support costs are through the roof because customers are constantly calling for support.

A unified portal brings together information from across the organization regardless of the type of content or where/how it was created, and makes it available to customers. It unifies the customer experience in a single, seamless environment.

Customers want a place where they can get in, quickly find everything they want and then get out. If it's too hard to find information, they'll walk away. A unified portal is the answer to this driving customer need.

About Ingeniux

Ingeniux is the leading provider of web content management and digital experience software. We enable organizations to orchestrate the entire customer experience from acquisition through to sales to support and service, across any device, application, or website.

We build content management software with an unparalleled focus on the content itself. The Ingeniux CMS is designed to manage and deliver modern websites, customer support portals, online communities, and other customer touchpoints.

We believe in intelligent "structured" content. We design our software to enable content reuse, enable true mobile and multi-channel content delivery, and insightful content discovery. Our unique content-as-a-service capabilities deliver content into web and mobile applications, and other key channels.

Ingeniux software is available as a fully managed software service or an on-premise application. Ingeniux delivers unparalleled service and support to customers worldwide.

To learn more, visit us at http://www.ingeniux.com.

INGENIUX

PO Box 21466
Seattle, WA 98111

info@ingeniux.com
877 445 8228