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Proven Strategies to Build the Vision and Value of an Exceptional Web Experience

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Proven Strategies to Build the Vision and Value of an Exceptional Web Experience

Session Number WEB205

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WebSphere Portal

Do you need to develop a roadmap for your portal initiatives so your organization maximizes the value from its portal? Do you have consensus in your organization on what to do first, or next, with a portal solution?

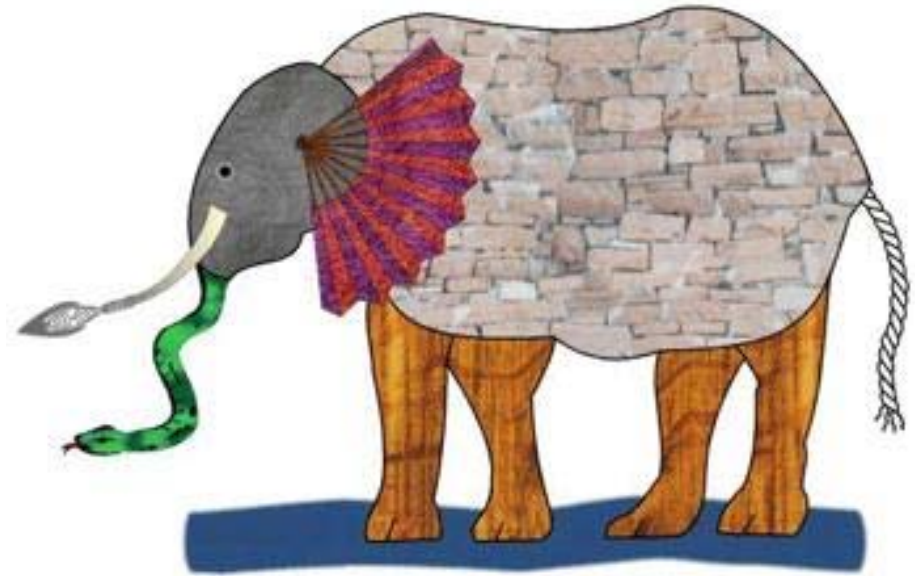
In this session, we will share with you IBM's proven method to develop consensus and gain the maximum value from your portal initiatives. Learn how you can reap the greatest benefit from a portal solution. We will show you how to assess your portal initiatives to determine measurable value compared to ease of implementation, so you can help your project stakeholders reach a shared understanding of portal investment benefits - and develop a consensus about how to proceed by aligning Portal capabilities with business priorities and objectives

Agenda

- The Portal Roadmap Challenge
- Developing a Portal Roadmap
- Case Example

Common Challenges and Pain Points

- “We **struggle to create a ‘shared vision’** between business, IT, and external/internal users”
- “We invested in an enterprise portal platform on the premise of ‘re-use’, but **don’t have an effective way to ‘resell’ capabilities** to other business areas”
- “We want to deploy role-based portal instances, but are **challenged to define needs of each audience**”
- “We bought portal to **build and deploy configurable composite applications**, but have not adjusted our application development process”
- “We would like to have a common information architecture and taxonomy, but have **no effective means to have a requirements dialogue with the business functional areas**”



...as a result, it's not always clear to everyone what the desired end state looks like.

Organizations use portals to drive cost savings, operational efficiency, and revenue increases through more valuable interactions with customers, employees, and suppliers

B2E Portals improve employee and management work productivity and decision support quality

Connect Interact Innovate

B2C Portals improve communication and service quality to customers and external stakeholders

B2B Portals improve collaborative transactions and knowledge sharing with key business partners

Information

Applications

Expertise

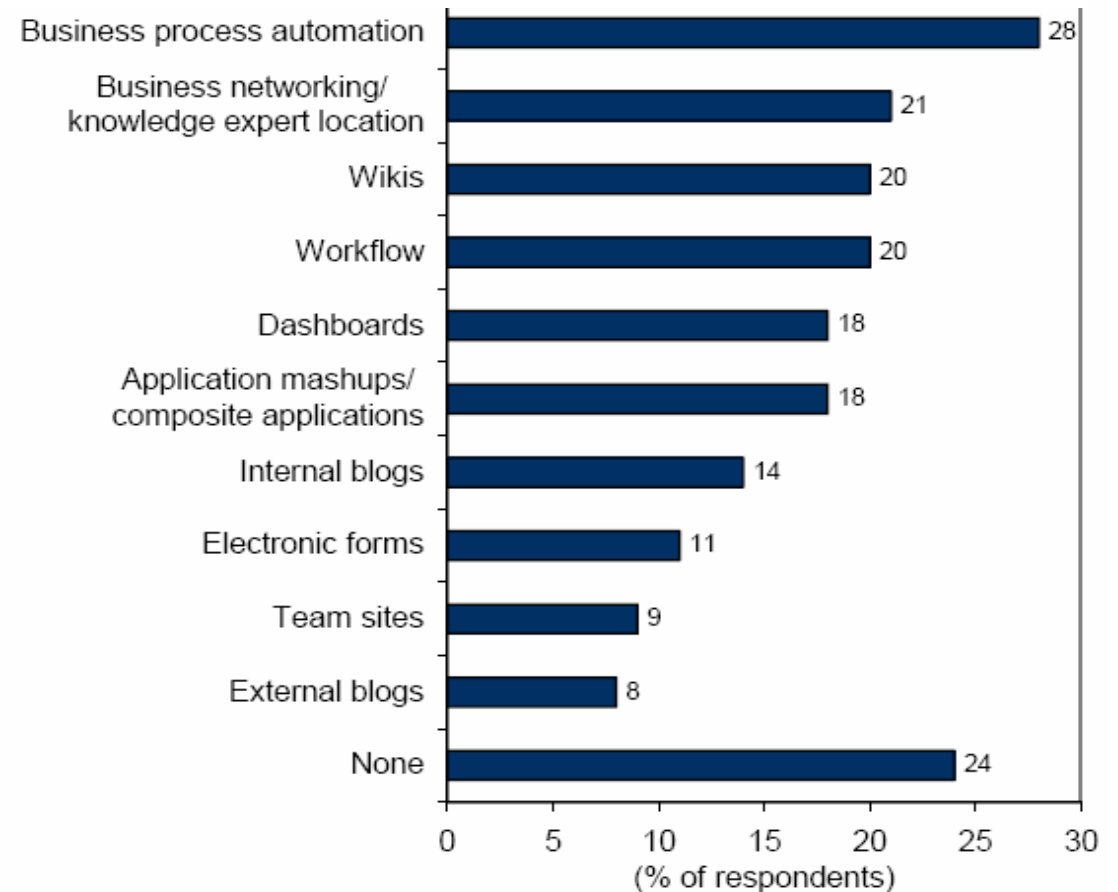
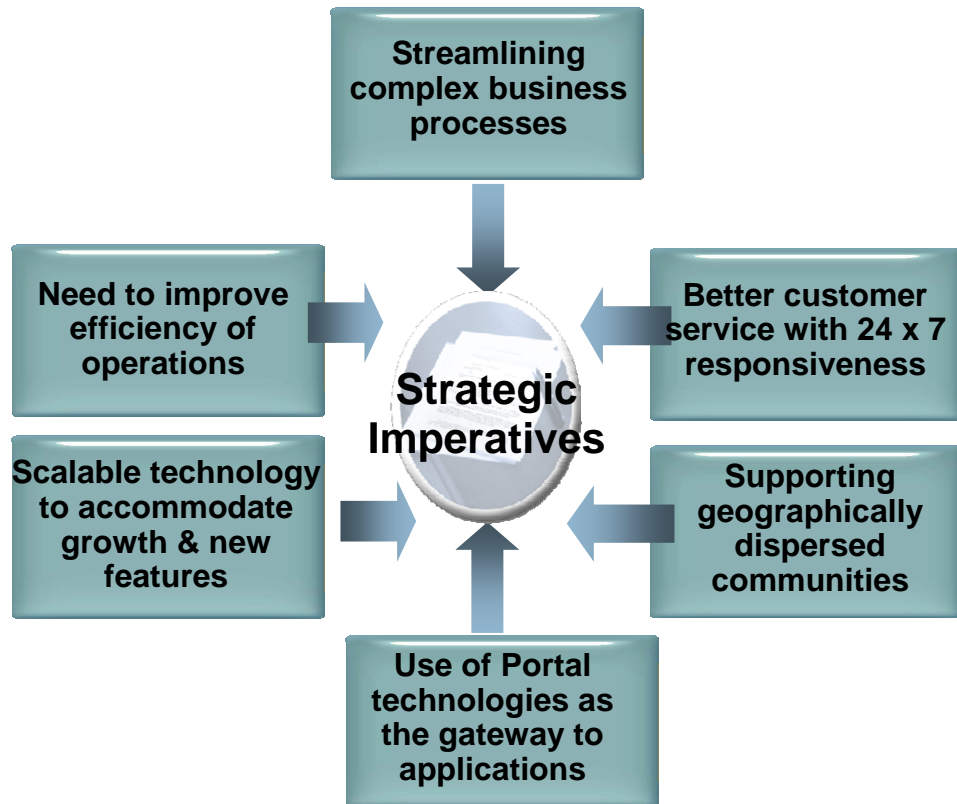
Processes

Common Portal Framework



Businesses are challenged to identify and align portal capabilities that deliver the greatest return against key goals and objectives

Which of the following features do you consider will be important to add to your portal(s) in the next 24 months?



Source: Enterprise Portal Software Usage

For example, in healthcare, a portal/forms solution can address multiple issues and opportunities

Key Pain Points

People Management

Role-based Information

Business Process Driven Integration

Role-based KPIs, Alerts & Analytics

Storage and Archival of Forms

IBM Portal Capabilities and Features

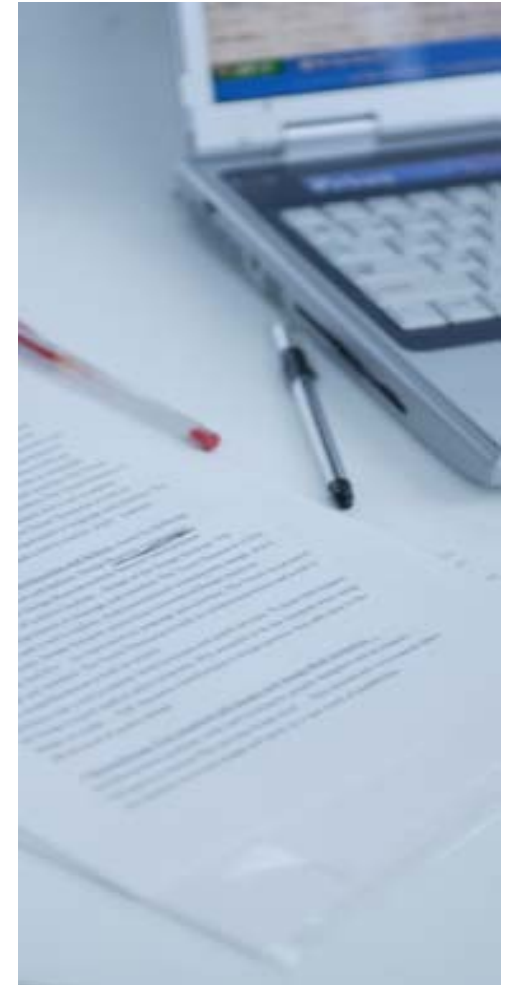
- . Self-service HR administrative access
 - . Enhanced on-line recruiting processes and approval workflows
 - . Improved integration of workforce performance and management systems

 - . Roles-based delivery of content and information
 - . Pushed information to different devices to increase usability
 - . Targeted alerts and communication to appropriate audiences
- . **Streamline patient on-boarding via electronic forms**
 - . **Automated confirmation of insurance coverage status**
 - . **On-line document retrieval**
 - . **Reduced cost of procuring and distributing paper-based forms**
 - . **Reduced time and effort required to develop and maintain forms**
 - . **Avoid additional IT infrastructure to integrate XML data into forms**
- . Quick access to leading business indicators by region
 - . Dashboards with color indicators to highlight trouble spots

 - . Reduced cost of manual labor associated with storing and archiving forms
 - . Avoid IT infrastructure cost associated with storage and archiving forms (e.g., scanning/imaging equipment)

In retail banking and insurance, straight through processing for fulfillment of online customer orders address pressures to...

- **Grow revenue**
 - Increase cross-sell/ up-sell opportunities
 - Increase customer participation
- **Reduce cost and gain operational efficiency**
 - Eliminate manual processes & reduce data inaccuracies
 - Increase use of customer self-service
 - Deliver cost-effective marketing campaigns
- **Enhance customer satisfaction**
 - Provide pervasive customer service
 - Increase interactivity to accelerate problem resolution
 - Speed fulfillment



How do we align and communicate the business and technical value of Portal and Collaboration technologies and make them relevant to key decision makers?

Business Value of Portal and Collaboration

“Deliver Exceptional Web Experiences”

“Empower the Business User”

“Collaborate without Boundaries”

“Optimize Cost and Time to Market”

Technical Value of Portal and Collaboration

Integrate

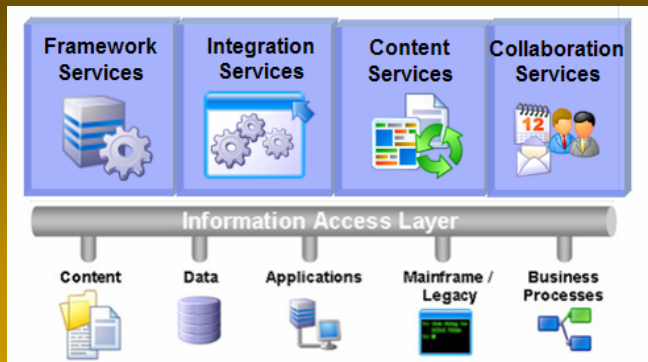
People, processes and information for roles

Optimize

Content & application access and usability expert and casual users

Extend

Collaboration & knowledge sharing across process teams



CEO



CFO



Decision makers want to understand how and where in their organization the proposed solution will create value – **in their language.**



LOB Exec



CIO

Given the breadth of possible value propositions, decision makers typically ask the following key questions

- *How does a portal solution **align** with and **enable** our **business objectives**?*
- *What is the **vision** for ‘**what done looks like**’?*
- *What is the **business case** to justify the investment?*

Agenda

- The Portal Roadmap Challenge
- Developing a Portal Roadmap
- Case Example

IBM uses a proven and structured approach to identify and assess business value opportunities for a portal solution



BVA Components

**Value
Alignment**

“What could we or should we do with a portal?”

**DITL
Visualization**

“What might the portal experience be for us?”

**Business
Case**

“How can we financially justify our portal investment?”

Value Alignment Analysis - Delivering a successful portal solution requires consensus on key objectives and a business case that shows how value can be realized

OBJECTIVES:

Provide a structured process for executive decision makers to gain consensus on alignment between portal solution capabilities and business priorities

DELIVERABLES:

- Business Goals and Objectives
- Identification of Portal Capabilities
- Stakeholder Alignment with Portal deployment targets, priorities, user-based scenarios and actionable roadmap

Portal Objectives

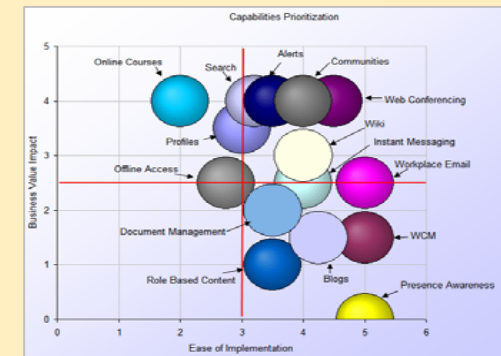
Key Objectives

- **People** – Create a work environment that attracts good people and maximizes employee retention
- **Service** – Create and maintain an environment that allows management to provide and execute service delivery
- **Quality** – Measure performance against customer, and industry standards
- **Growth and Finance** – Grow the business by 8-12% annually, do this by...
 - ▶ Retaining and growing existing accounts (up-sell and cross sell)
 - ▶ Increasing net new sales

Key Capabilities

Workplace Solution Area	Workplace Business Capabilities & Business Transformation	Subsidiary Business Model	Business Value Impact				Ease of Implementation				Connectivity Required			
			Revenue	Cost	Productivity	Retention	High	Medium	Low	None	High	Medium	Low	None
WORKPLACE-BASED COLLABORATION	1. Content Management	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1
	2. File Management	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1
	3. Search	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1
	4. Alerts	4.1	4.1	4.1	4.1	4.1	4.1	4.1	4.1	4.1	4.1	4.1	4.1	4.1
Summary	Workplace Social Collaboration		1.1		1.1	1.1	1.1		1.1		1.1		1.1	
SELF-SERVICE & CUSTOMER SERVICE	1. Personalization	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1
	2. Social Messaging	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1
	3. Instant Messaging	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1
	4. Presence Awareness	4.1	4.1	4.1	4.1	4.1	4.1	4.1	4.1	4.1	4.1	4.1	4.1	4.1
Summary	Self-Service & Customer Service		1.1		1.1	1.1	1.1		1.1		1.1		1.1	

Priorities



Value Alignment and Prioritization

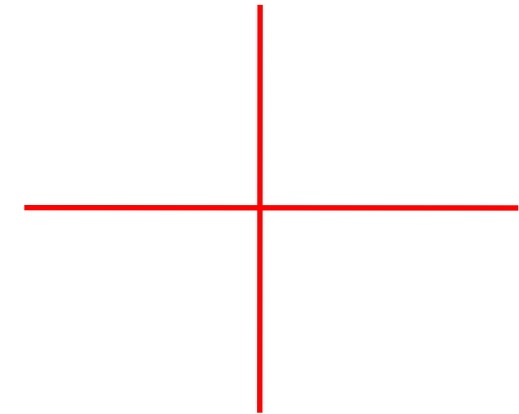
Primary Business Objectives

1. Improve customer access to products and services

2. Enable customers to make informed decisions faster

3. Use customer feedback to improve quality of service

Prioritized
Value of
Portal
Capabilities



Business Requirements

Challenges

Portal Opportunities

Provide best-in-class
customer self-service



- Lack personalization or specialized help in online channel
- Content is not easy to find
- Lack holistic customer account view
- Lack ability to send alert to customer confirming results of recent transaction
- Lack of customer awareness of complete suite of online service availability



- Role-based content delivery
- Customizable content
- Integration with external sources
- Application Integration
- Search
- Alerts
- Pervasive mobile device access

Enhance convenience
for customer



- Online channel lacks 2-way communication
- No formal customer contact (history) system
- Little online document delivery
- Little straight through processing for online order fulfillment



- User selected content feeds
- Financial education tools
- Presence awareness
- People & expertise Location

- *The Roadmap*
- *The Picture*
- *The Numbers*

Interviews are conducted with key client stakeholders to gather information for the value alignment analysis

What Do We Talk About?

- Primary **role** and function
- Key **business objectives**
- Key issues and **barriers to achieving business objectives**
- Information and data requirements
- Key data sources and IT systems and applications
- High-level overview and description of the primary business process activities
- Primary modes of internal and external communication

Information gathered during the interview process is used to establish a common set of primary business objectives

Primary Business Objectives

1. Improve customer access to products and services

2. Enable customers to make informed decisions faster

3. Use customer feedback to improve quality of service

Once consensus on business objectives is reached, each objective is then supported by identified business requirements and challenges

Business Requirements

Provide best-in-class customer self-service

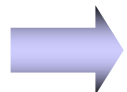


Enhance convenience for customer



Challenges

- Lack personalization or specialized help in online channel
- Content is not easy to find
- Lack holistic customer account view
- Lack ability to send alert to customer confirming results of recent transaction
- Need to provide/increase “warm, easy, feel” of online channel
- Lack of customer awareness of complete suite of online service availability
- More personalization requires longer talk times in the call center
- Online channel lacks 2-way communication
- No formal customer contact (history) system
- Lack financial educational tools
- Little online document delivery
- Little straight through processing for online order fulfillment



Based on the value discovery dialogue, portal capabilities are aligned to business requirements

To ensure effort is spent on high-value activities, the team prioritizes the key portal capabilities by business impact and ease of implementation

Business Requirements

Provide best-in-class customer self-service

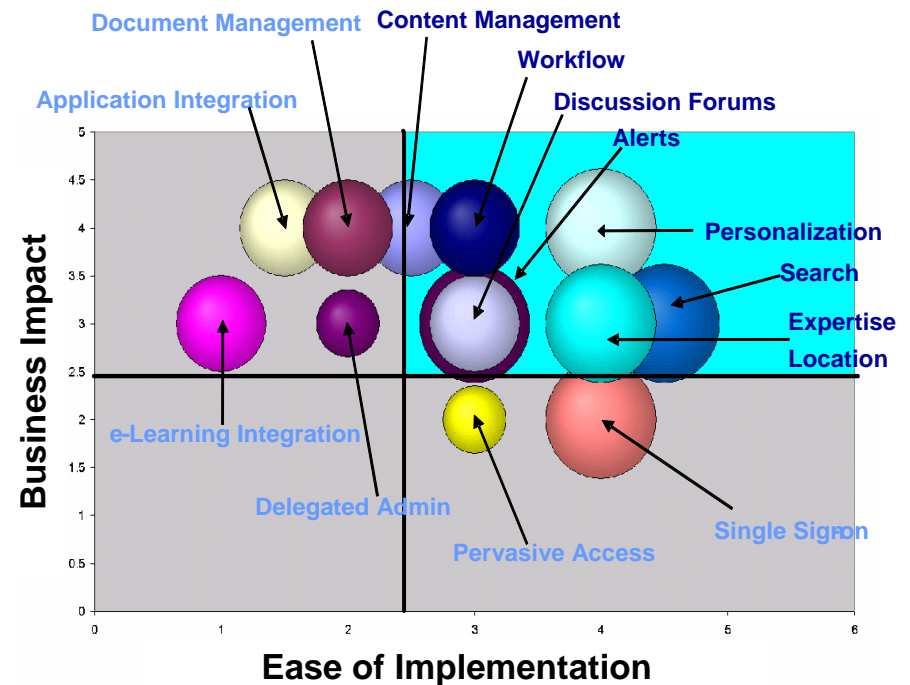
Enhance convenience for customer

Challenges

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Portal Opportunities

- Role-based content delivery
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- Pervasive mobile device access
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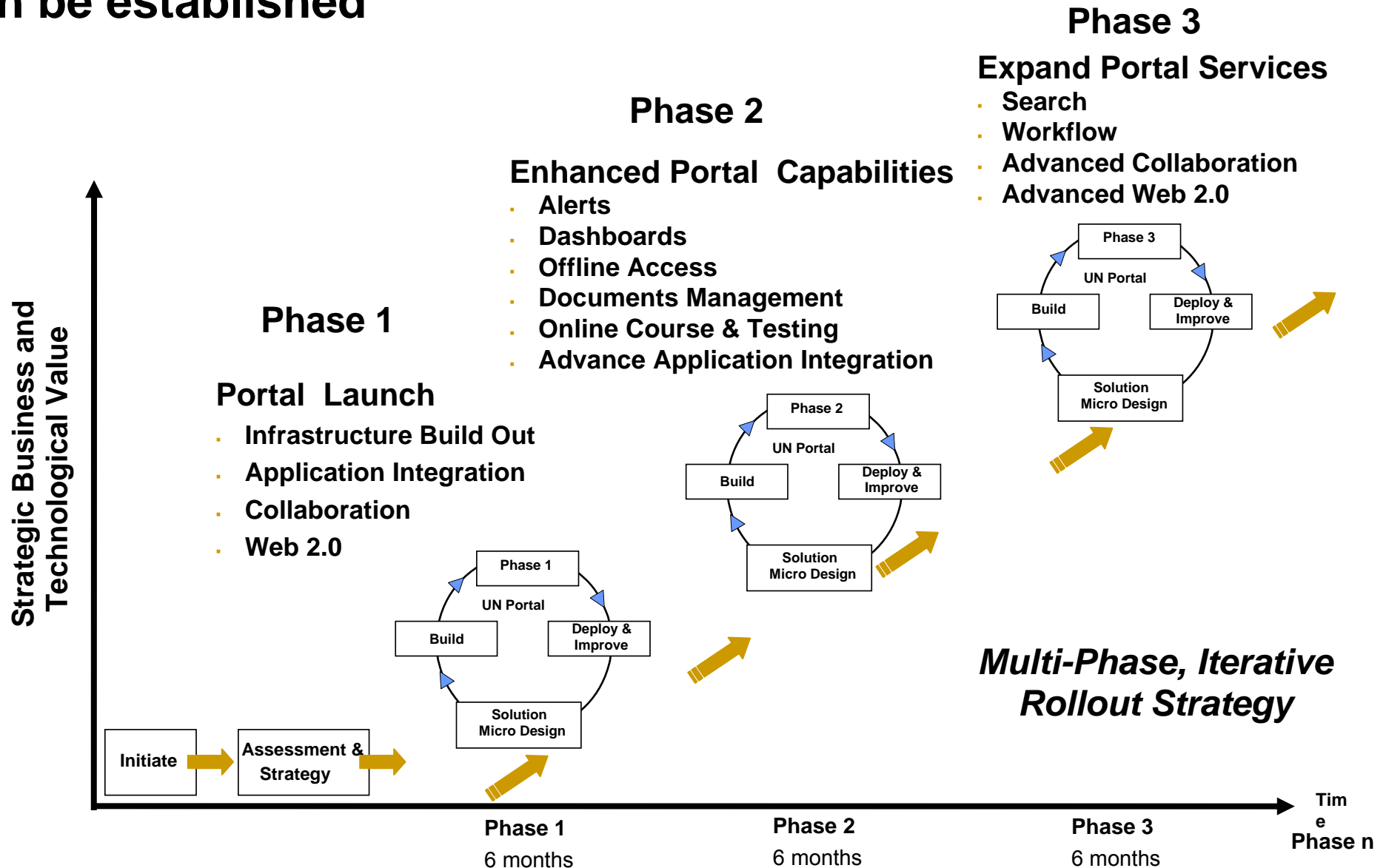
Prioritize Portal Capabilities Into Implementation Waves

Prioritization Criteria & Methodology

Business Impact / Benefit	Ease of Implementation
<ul style="list-style-type: none">• Count starts at 0• Add 0 (No help), .5 (Some Help) or 1 (Significantly Helps) for each Business Objective area that is positively impacted<ul style="list-style-type: none">• Improve customer access to products and services• Enable customers to make informed decisions faster• Use customer feedback to improve quality of service	<ul style="list-style-type: none">• Count starts at 5• Subtract 0 (easy), 0.5 (Medium) or 1 (Very Challenging) for each complexity element<ul style="list-style-type: none">• <i>Process</i> (e.g. switch from manual to automated)• <i>Organization</i> (e.g. roles, responsibilities, org structure change/difficult to put in place)• <i>Culture</i> (e.g. hard to drive adoption)• <i>Technology</i> (e.g. difficult to deploy)

Communities Impacted
<ul style="list-style-type: none">• Count starts at 0.• Add 1 for each community significantly impacted, .5 for some impact.<ol style="list-style-type: none">1. Customers2. Employees

With a set of prioritized high-value portal capabilities, a roadmap can be established



Day-in-the-Life (DITL) Visualization - providing a visualization from the perspective of the various target users in the context of prioritized use case scenarios

OBJECTIVES:

- Illustrate a visual representation of a Portal Solution from a user community view point
- Highlight business value targets and promote executive dialogue to refine value targets visually
- Help stakeholder and solution sponsors to deliver Day-in-the-Life to other executive colleagues and decision makers

DELIVERABLES:

- Personalized Day-in-the-Life demo of target portal solution
- Visualization of key business requirements and function points in the context of target use case scenarios
- Demonstrable vision of “what done could look like” to assist with vision buy-in and delivery planning

Roles-Based User Scenarios



Capabilities in Business Use Case Context



DITL – creating a business use case vision for “what done looks like”

- The “Day-in-the-Life (DITL)” provides....
 - an effective ‘dialogue opener’ between business users and IT
 - a visualization of the critical business capabilities
 - a description of Portal and other IT enablers in the context of customer
 - a set of reusable “demolets” organized to show business capabilities and technology enablers
- ...and helps align Business and IT
 - focus on ‘what’ and ‘why’, before ‘how’
 - low risk and cost for innovative exploration
 - demonstrable vision of “what done looks like”

Roles-Based User Scenarios



Capabilities in Business Use Case Context



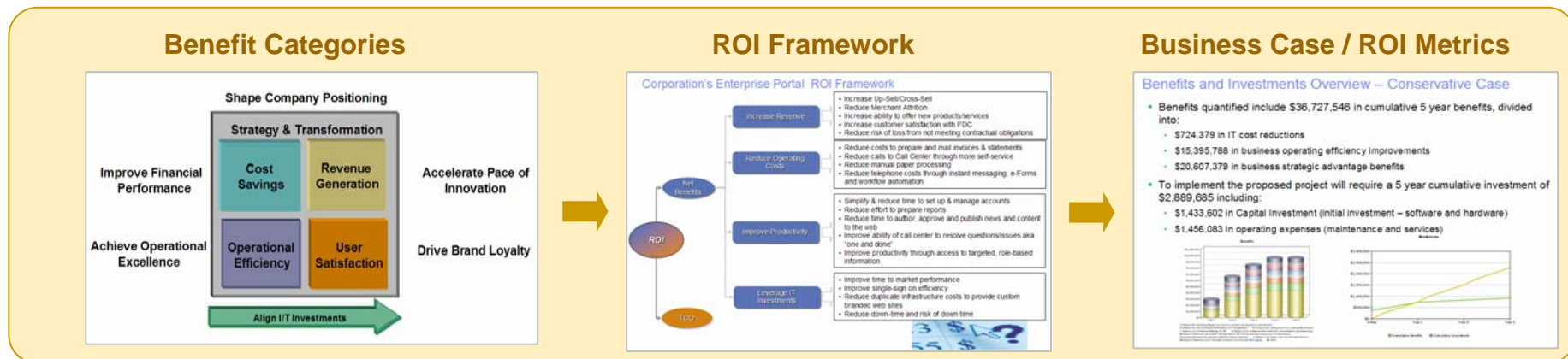
Financial Business Case / ROI - providing an estimate of the financial benefit opportunity, required investment ranges, and associated financial return metrics for the proposed solution

OBJECTIVES:

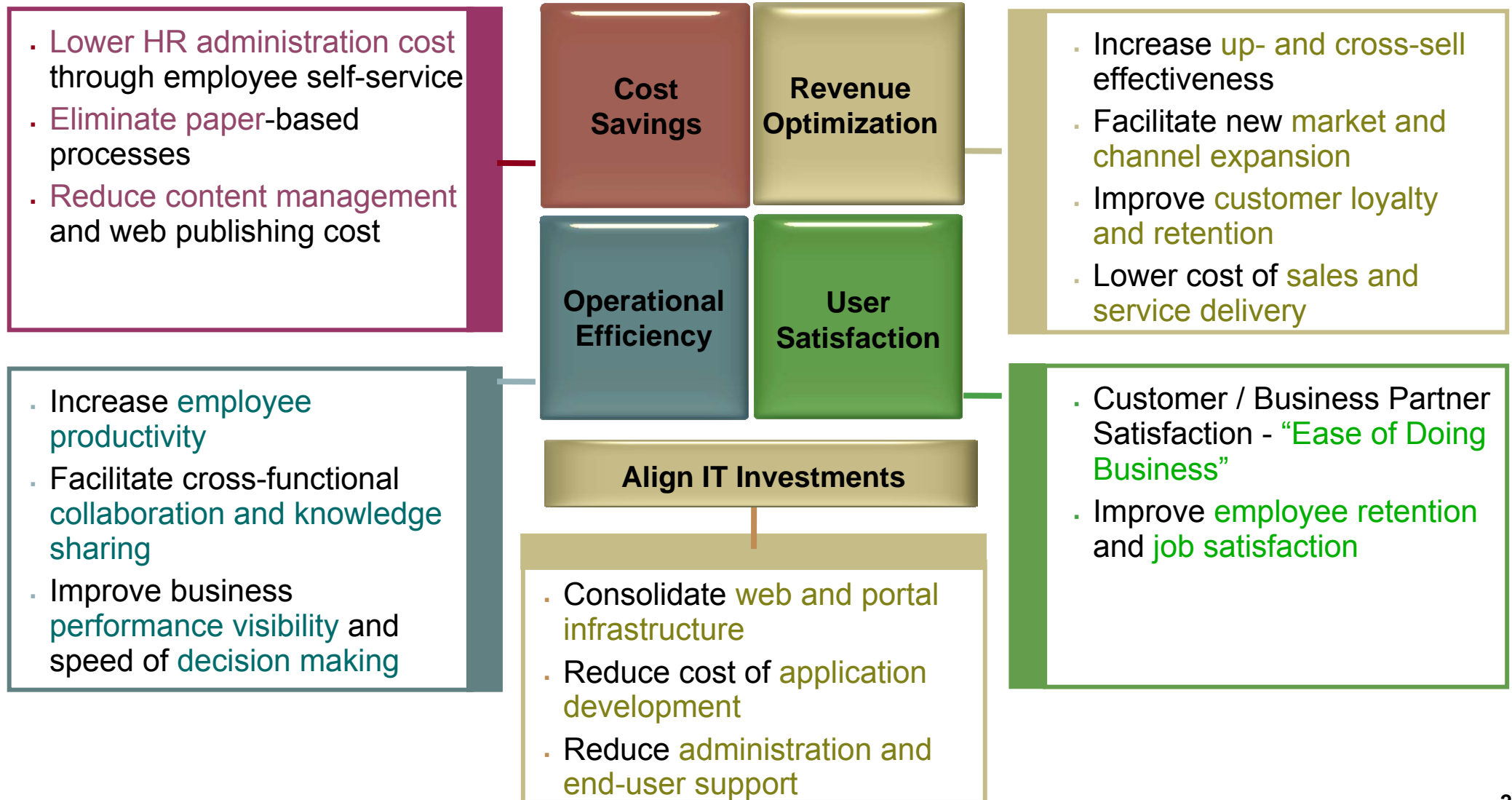
- Identify the financial benefits that are expected as a result of the portal initiative
- Provide high-level quantitative / qualitative estimates for benefits and required cost
- Develop the Business Case and ROI analysis to support financial decisions

DELIVERABLES:

- Quantified estimate of benefits and required cost
- Personalized executive presentation document summarizing key business objectives, quantified value drivers and ROI results sensitivity



The assessment of potential business value for an enterprise portal can be viewed from multiple perspectives



Creating a customized “Value Map”



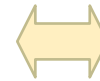
Business Objectives Challenges / Opportunities

Capabilities

Benefits

Increase website traffic

- Complex user interface causing customer dissatisfaction
- Low rate of repeat website visits



- Redesigned user interface
- Improved search & navigation
- Personalized content

- 5 – 20% increase in website traffic

Increase up-sell / cross-sell effectiveness

- Low up-sell/cross-sell success rates
- Inability to dynamically offer targeted promotions



- Customer click stream analytics
- Targeted marketing messages and promotions
- Context-sensitive delivery of promotions

- 5 – 10% increase in up-sell / cross-sell rates

Increase sales conversion

- High abandon rate of web-based sales transactions
- Updating product and service information on web requires lengthy publishing cycle



- Guided product & solution search
- Information and web content tailored to support decision making process

- 10 – 50% increase in conversion rate

Increase average order size / customer contract value

- Inability to differentiate customer service levels by customer segment value
- Stagnant transaction value per customer order



- Personalized web content delivery
- Pro-active technical support
- Differentiated customer service levels

- 10 – 40% increase in customer transaction value

Increase number of leads

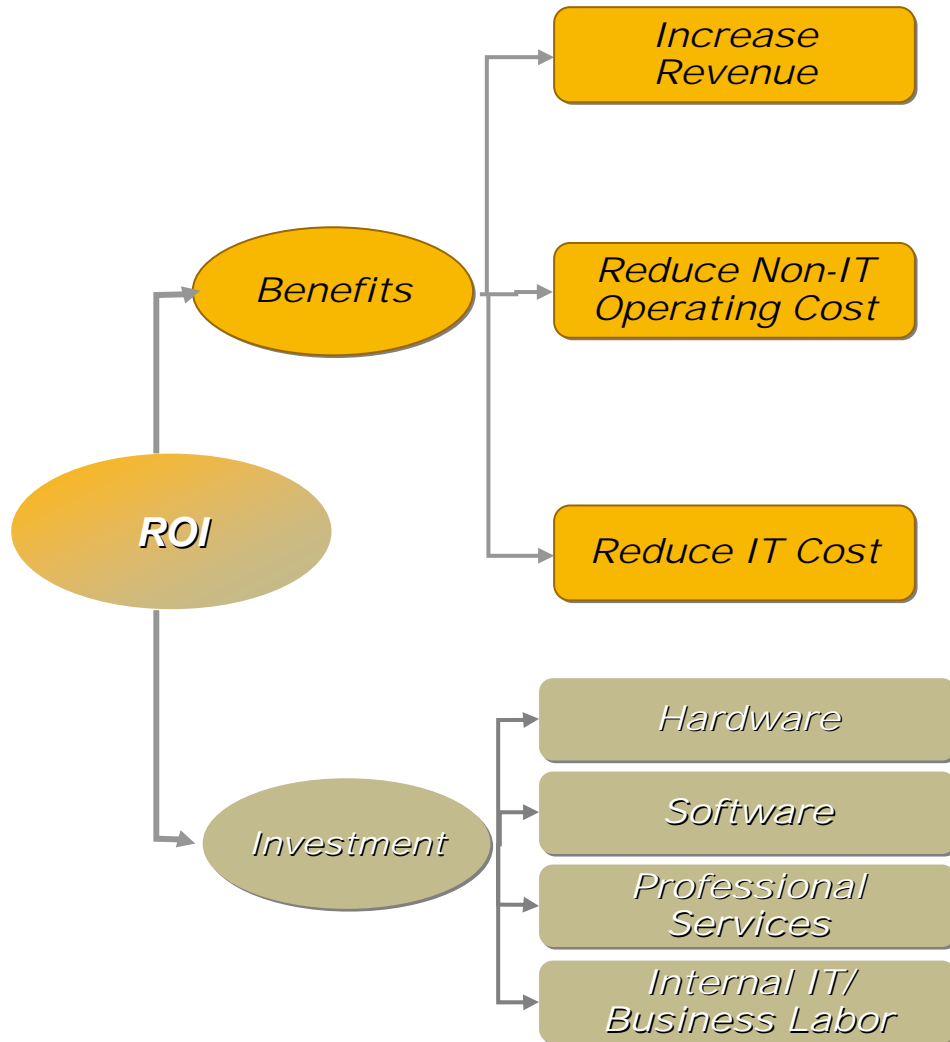
- Customer profiling information often misses key information
- Volume of leads generated through web-based service channels not growing



- Automated, wizard-based service support transaction forms

- 10 – 50% increase in leads generated from tech support interactions

Summarizing the key benefits



Benefits

- Increase up-sell / cross-sell effectiveness
- Increase average order value
- Increase number of leads

- Reduce tech service support calls
- Shorten Average Handling Time (AHT) for support calls
- Reduce printing and distribution cost of documentation

- Reduce call center application integration cost
- Reduce IT Helpdesk cost
- Consolidate HW and SW infrastructure

Agenda

- The Portal Roadmap Challenge
- Developing a Portal Roadmap

They talked

Retail BankCo BVA Interview Participants	
Sales	Bill Lopez, SVP
Marketing	Derek Williams, VP
Lending	Stephen Chavez, VP
Information Technology	Amelia Regan, CIO
Finance	Susan Musgrove, CFO
Org. Planning & Development	Doug Campbell, SVP

We heard

Primary Business Objectives

1. Improve customer access to products and services

2. Enable customers to make informed decisions faster

3. Use customer feedback to improve quality of service

We analyzed "Improve customer access to products and services"

B2B

B2C

B2E

Enterprise Portal



Business Requirements

Provide best-in-class customer self-service



- Lack personalization or specialized help in online channel
- Content is not easy to find
- Lack holistic customer account view
- Lack ability to send alert to customer confirming results of recent transaction
- Lack of customer awareness of complete suite of online service availability

Enhance convenience for customer



- Online channel lacks 2-way communication
- No formal customer contact (history) system
- Little straight through processing for online order fulfillment

Challenges



Portal Opportunities

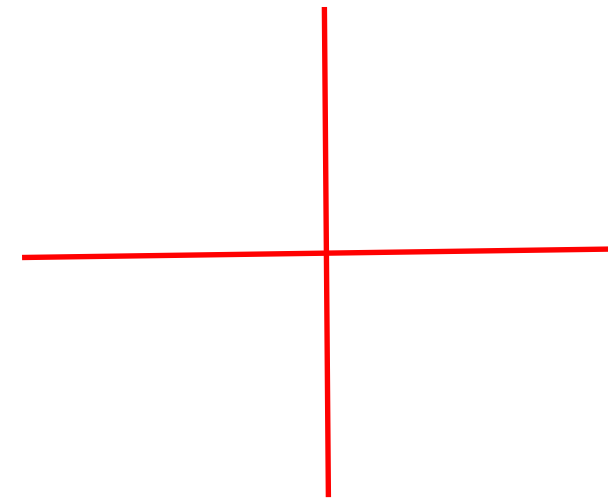
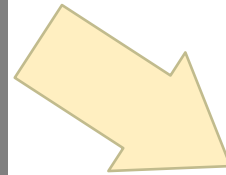
- Role-based content delivery
- Customizable content
- Integration with external sources
- Application Integration
- Search
- Alerts
- Pervasive mobile device access



- User selected content feeds
- Financial education tools
- Presence awareness
- People & expertise Location

We prioritized

Workplace Solution Areas	Workplace Business Capabilities	Solution Short Name	Business Value Impact				Overall Business Impact Rating	Ease of Implementation			Overall Ease of Implementation
			0.0 - small	0.5 - medium	1 - high	2 - must have		0.0 - easy	0.5 - moderate	1 - difficult	
			Growth	Improved productivity	Enables self-empowerment	Better decision-making		Collaboration	Process	Technology	
WORKPLACE BASED CORP COMMUNICATIONS (Information Integration)		Workplace Based Communications									
	> Document Management for single point of truth for product and procedure information.	Doc Mgmt	0.5	1.0	1.0	1.0	3.50	1.0	1.0	0.0	2
	> Web Content Management for SME content contribution by corp comm. or division or plants	WCM	1.0	1.0	1.0	1.0	4.00	1.0	1.0	0.0	2.75
	> Personalized content delivery	Personalization	1.0	1.0	1.0	1.0	4.00	0.0	0.0	0.0	5
	> 'google-like' searching across all documents and content and expertise	Search	0.5	1.5	1.0	1.5	4.50	0.0	0.0	0.0	4.75
	> External news feeds	News Feeds	0.5	1.0	0.0	1.0	2.50	0.0	0.5	0.0	4.5
SUMMARY		Workplace Based Communications					3.70				3.8



Prioritize portal capabilities by:

- Business Value
- Ease of Implementation

We illustrated the vision

The screenshot displays the Open Financial Network website interface. At the top, the user is identified as 'Alice Sheen, Small Business Customer' with a 'Logout' link. The navigation menu includes 'Products', 'Director Page', 'Login', 'Home', 'Online Education', 'Small Business Resources', and 'Products'. A search bar is located on the right side of the navigation bar.

The main content area is titled 'Business Loans' and includes a 'Business Loans' section with a form for loan application. The form is divided into several sections:

- Identity Information:**
 - SSN/SIN*: 123-45-6789
 - Date Of Birth* (MM/DD/YYYY): 02/08/1975
 - Drivers License Number*: 64733134
 - State/Province*: Texas
- Contact Information:**
 - Home Phone*: (512) 555-0100
 - Work Phone*: (430) 555-0120
 - May we call you at work regarding this application?: Yes No
 - Email: alice.sheen@landscapedesign.com
 - Retype email to confirm: alice.sheen@landscapedesign.com
- Co-Signer Information:**
 - Will there be a co-signer on this application?: Yes No

Navigation buttons for 'Previous' and 'Next' are located at the bottom of the form.

On the right side of the page, there is a 'Personal Advisor' section featuring a profile picture and a 'Contact me' link. Below this is a 'Loan Calculator' section with input fields for 'Loan Amt:', 'Interest (%)', '# of Years', and 'Payment', each with a 'Compute' button.

At the bottom right, there is a 'Gadgets powered by Google' section containing an 'Account Name' and 'Balance' table:

Account Name	Balance
Business Checking	\$ 71,176.62
Money Market	\$ 51,194.85
Regular Savings	\$ 9,233.77
Rollover IRA	\$ 16,696.39
Retirement plan (SEP)	\$ 42,638.59
Student Loan	\$ (6,445.09)
Car Loan	\$ (3,841.93)
Total	\$ 173,795.35

Below the table, there is an 'Experts on this Topic' section listing names like Vijay Nahry, Simone Dray, and Dan Misawa. A 'Related Content' section lists articles such as 'Building the Best Team' and 'Credit as Easy as 1 2 3'.

We developed the business case

- **Total 3-year Benefits: \$7.8M**

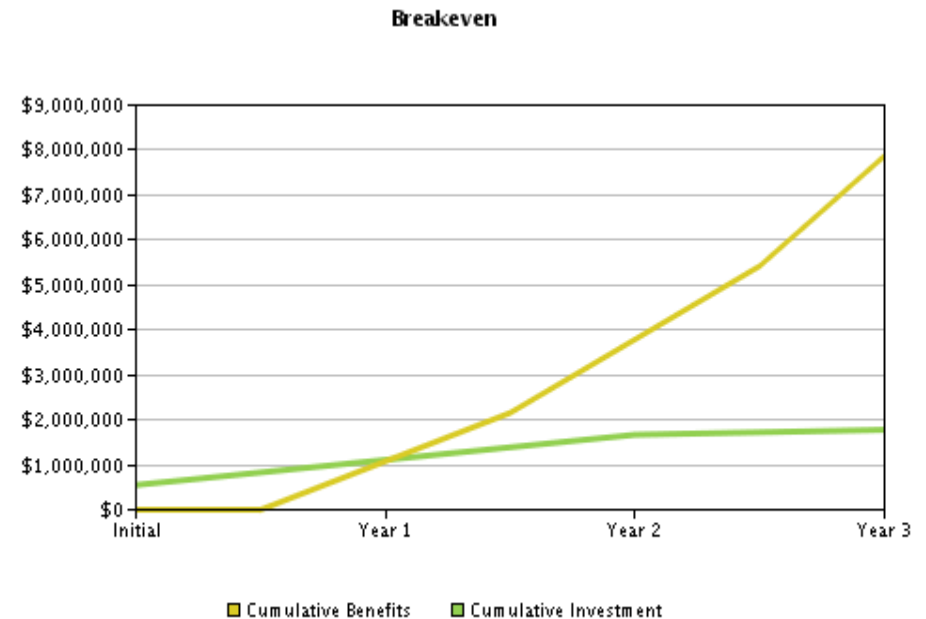
- \$5.6M in business operating efficiency improvements
- \$2.2M in business strategic advantage benefits

- **Total 3-year Cost: \$1.8M**

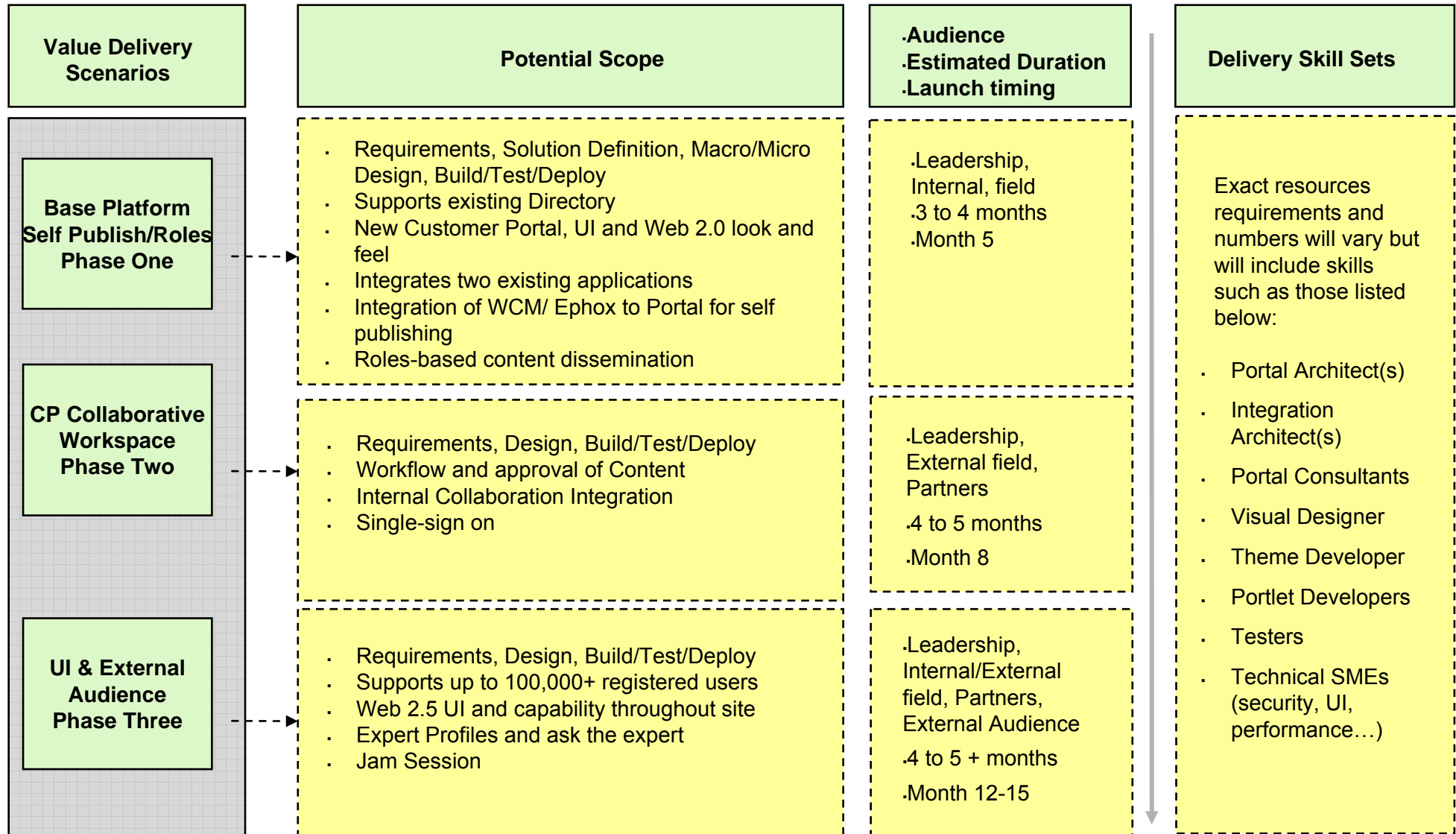
- \$0.7M in capital investments
- \$1M in operating investments

- **Positive ROI, NPV, and Payback:**

- Risk Adjusted Return on Investment (RA ROI) of 295%
- Net Present Value (NPV) savings of \$4.7M
- Payback period of 13 months



We recommended



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Thank You



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