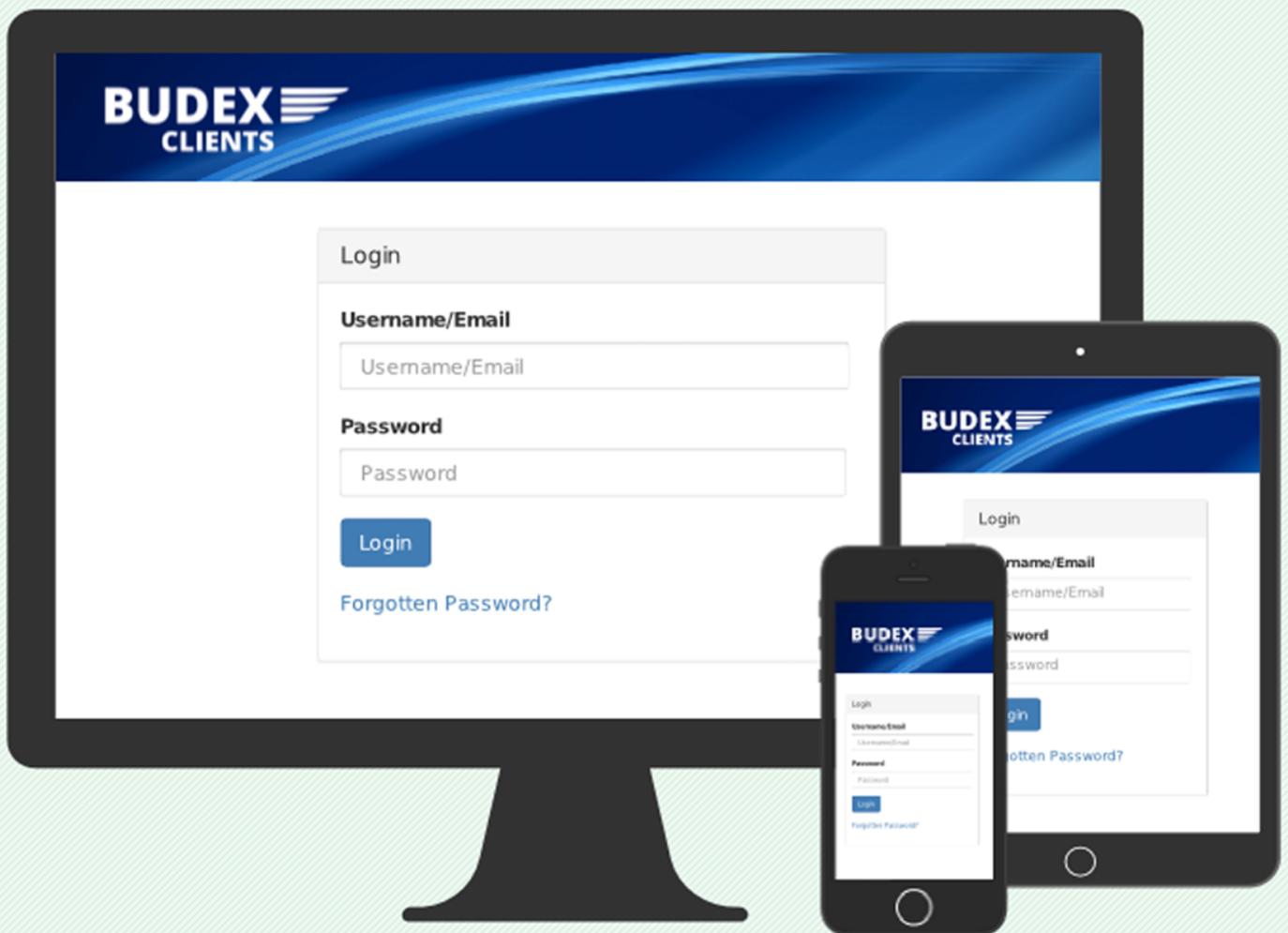




The Ultimate Guide To Client Portals

How to choose your perfect solution



CONTENTS

What Is A Client Portal?	pg. 3
The Benefits Of Using Client Portals	pg. 6
Potential Drawbacks Of Your Client Portal	pg. 10
What To Look For In Your Client Portal	pg. 14
Top Use Cases For Client Portal Software	pg. 19
How To Create Your Client Portal	pg. 22
5 Tips To Help You Get More Out Of Your Portal	pg. 25

The Ultimate Guide To Client Portals

What Is A Client Portal?

What is a client portal?

A client portal is a gateway for your clients to interact with you online. More specifically, it is used for securely sharing documents, services and information between you and your customer(s) across the Internet.

A client portal complements your website by providing a channel to share content one on one with each individual customer. Through a controlled and secured access, you can confidently share sensitive documents and other communications to an individual customer, a group of them or all of them as needed.

A properly implemented client portal not only improves the communication efficiency with your clients, but also allows sharing of information within your team and keeping all relevant members informed in a timely manner.

While your client portal has to be aligned very closely to your website, there are significantly different requirements for the two. Your website is your public face to potential customers, suppliers and other stakeholders and has to be accessible to everyone who may be interested in you and your company.

A client portal, on the other hand, is direct communication to your clients, suppliers and other selected stakeholders that you allow access to. As such, it is important that this has a high level of security and reliability with good tools to have various types of communication that your business may require.

So, while it is technically possible to develop and implement a client portal in the same manner as you would develop your website, the different requirements make it more cost effective to choose from various cloud based subscription services that are available today.

Cloud based subscription services are capable of handling the security and user management easily and would be kept updated by the vendor.

Solutions such as Clinked also offer a number of branding and integration options, which would ensure that the use of the service is transparent to your clients. With your branding and even your own domain in the website URL, clients will have a seamless experience.

In short, client portal software can provide a scalable business solution for companies needing a bank-grade level, secure cloud environment to store their files, plan group events, and collaborate with team members on projects.

It's predicted that more than 50% of information technology will be in the cloud within 5-10 years. ([Mashable](#))

WHAT IS A CLIENT PORTAL?

Cloud Software will be suitable if...

- You need a solution as soon as possible. Typically, cloud software will take less time to implement compared with on-premises software.
- You don't have (or enough) dedicated IT personnel, skills or time to manage your software. Rest assured your third-party vendor would have extensive experience in installation, maintenance and keeping your software up to date.
- You want to become a more innovative company.
- You're looking for a solution that can improve the way your organisation works remotely. Because cloud software is accessible from the Internet, your team and clients will be able to access their documents from anywhere with an Internet connection.

The Ultimate Guide To Client Portals

The Benefits Of Using Client Portals

THE BENEFITS OF USING CLIENT PORTALS

With evidence that moving to the cloud can save your company money, improve business process efficiency and increase flexibility; it's no wonder that by 2019, more than four-fifths (86%) of workloads will be processed by cloud data centres (Cisco).

From secure file sharing with multiple clients, to improving collaboration between employees and easily organising group projects with remote teams - the benefits of implementing a client portal are endless and vary from business to business.

Improve Collaboration

Bringing in a client portal to your business will help your employees to improve their collaboration at work – whether that's working remotely or in an office.

The collaborative features of a client portal can allow businesses to: work on multiple documents easily, with team members and clients; have engaging group discussions in a secure environment more easily (in comparison to long e-mail chain conversations); as well share important files and folders safely and efficiently.

80% of emails are a waste of time.
([Wall Street Journal](#))

Increase Flexibility

With 24/7 access to documents and conversations, clients and team members can login to their portal from anywhere, at any time. As client portals run in real-time, conversations can take place between team members and clients from all over the globe, without the concerns of slow network latency.

You can increase the mobility of your business with client portal software. When your clients and team members can access important documentation, keep up to date with internal conversations and follow important events coming up; they will not only be more engaged, but happier and more productive too.

Easy Access To Information

Following on from increasing flexibility, client portals can make it easier for clients and team members to get to the documents that they need to, rather than having to go through filing cabinets and overbearing e-mail chains stuffed with attachments. Since client portals provide 24/7 access to resources, collaboration and communication features; better results can be achieved, in a shorter amount of time.

28 hours are spent writing emails, searching for information and internal collaboration.

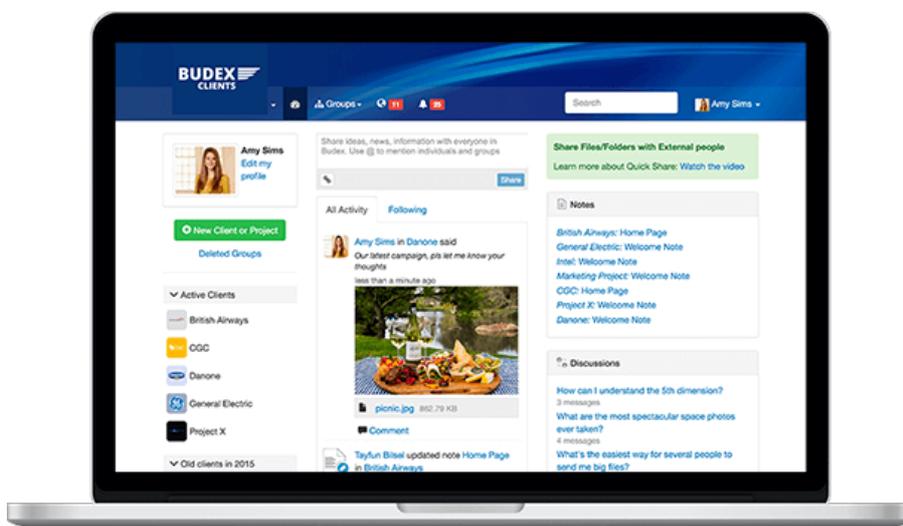
(McKinsey)

White Label Solution

By adopting a white-label solution, you're allowing your clients to easily associate your software to your business, improving brand recognition and awareness. Your white-label client portal will build trust with your clients and team members, as well as create a consistent experience for everyone.

Customisation options for client portals often vary widely, depending on the software vendor: where some may let you only upload your logo and choose your colours, others may offer complete re-skinning to fit your corporate guidelines.

By choosing to implement a white label solution like Clinked, you can keep your costs down too; within Clinked's pricing packages, many branding options are available to businesses.



Secure File Sharing

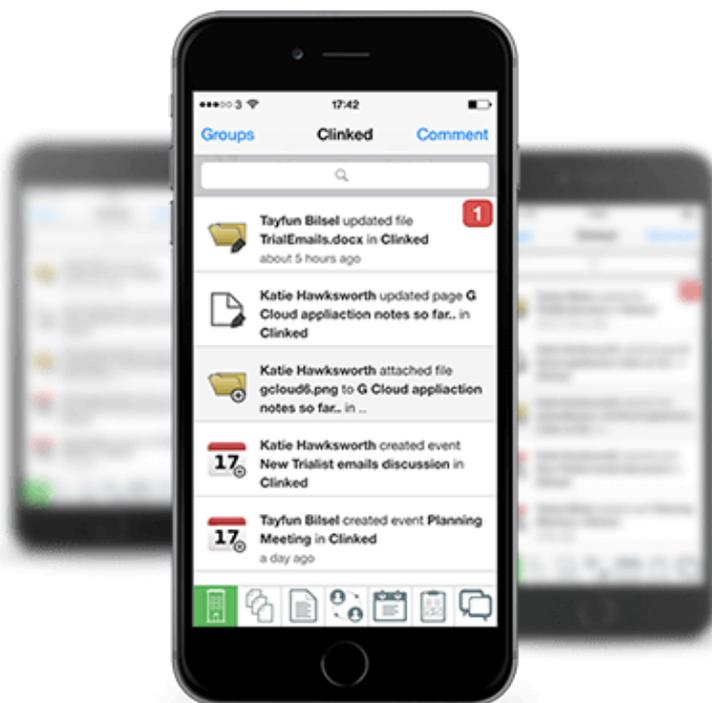
16.2% of files uploaded to file sharing services contain sensitive data. It's also worth noting that 27.8% of users have uploaded sensitive data to a file sharing service; with confidential data being the most common type of sensitive data being stored in the cloud (47%). (Sky High Networks)

Implementing client portal software, which comes with bank-grade security, will ensure that you have maximum protection of your files.

A Scalable Solution

Whether you require a client portal for 10,000 or 10 clients, one of the main benefits of client portal software is that it's subscription-based, meaning that you have the ability to scale your solution up and down with your business. For example, Clinked offers three base packages that are suited to the size and needs of your business.

In addition to the base features that will be available to you, there'll likely be additional add-on options for you to choose from, such as a mobile app, customised URL, or additional file storage space. It's important to do your research into different vendors, because each will offer different variations of client portal software.



The Ultimate Guide To Client Portals

The Potential Drawbacks Of Your Client Portal

Although the main drawback of your client portal may be that you don't yet have one, there are loads of other reasons why yours may not be working for you, or is working inefficiently. Unfortunately, sometimes it means that you should probably change the software that you are using. The problems with your client portal may not seem so obvious but after reading this chapter, you will hopefully realise some of its downfalls.

YOU CAN'T BRAND IT

Creating and promoting your business brand is essential to becoming a successful and memorable business. Through branding you can also get current and potential clients to trust you. Make sure your client portal can be branded.



IT IS BADLY LED

It is important to make your client portal the go-to place for your team and clients. If you're not undertaking as much work as possible within the portal then nor will your team.



IT IS TOO COMPLICATED



Your tool is going to have to be quickly and easily learned by clients. Make sure your client portal is simple to use and not full of clunky nonsense that will distract or confuse them. Choose one with a natural familiarity.

IT ISN'T SCALABLE

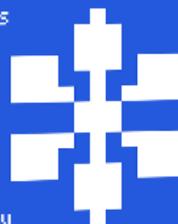
You need to respond to your resources as your business changes. Having the ability to scale up or scale down your client portal means that you'll be saving money by not having any resource unused.



WHY YOUR CLIENT PORTAL SUCKS

ITS PURPOSE ISN'T REFINED

Client portals save your business money through increasing your business efficiency. If your tool isn't right for your business, you will be creating workarounds which could lead to your team accidentally losing the efficiency.



YOU'RE USING TOO MUCH

Many businesses use multiple software to manage their projects and interact with their clients. This is irritating for all parties involved. Find a product that consolidates Enterprise Social Networking, Project Management and File Management within one product, leaving less to learn for your team and clients.



You can't brand it

In an increasingly competitive business environment, branding is key for your business, image and relationships. You need to be able to provide your excellent service within your client portal as part of the overall package and using branding in accordance with your business will make your clients aware of this and make you more memorable.

(We've created an e-book about the importance of business branding, so go [here](#) to download your copy)

It's badly led

It's very important for people in senior roles to be using your client portal to its full potential. We all know that employees are resistant to change, so it's imperative that you're leading by example and not giving your team the option to use inefficient tools.

It's too complicated

Clients don't have as much time as your team to get to grips with your client portal and it's something that will put them off if it is rigorous and laborious. Having a portal that takes seconds for your clients to setup, access and easily navigate will mean that they're happy to use it and make the most use of it.

Its purpose isn't refined

We've all been in situations where we've heard the following words; "that will do". We're often told to work with tools, which aren't quite for the specific purpose, but if you tweak the way you're working, it will be fine. These workarounds create inefficient barriers to productivity and whilst they may solve a problem temporarily, in the long term these inefficiencies will cost you. Find a tool that is right for your business.

It isn't scalable

Businesses are often in a situation where they've purchased a huge software package in order to prepare them for the future. Using a scalable tool will allow you to upgrade and downgrade your product at the click of a button. This will save you money and ensure that none of your resources are going to waste.

You're using too much

No clients or workforce are going to want to flick between applications, copying data across as and when it's needed. It's inefficient and a waste of time. Having a universal system which contains all of your productivity and management tools means that nobody will have to fuff around trying to copy messy file formats from one system to another and failing after trying all day. It also means you have a single login and don't have to worry about remembering different passwords and usernames. It's also less to learn!

So that's it. Managers need to explore a wide range of options whilst ensuring that they're getting the best value for money and be prepared to change if they're not.

(Originally written by Ed Neely for the Clinked Blog. You can view the post [here](#))



The Ultimate Guide To Client Portals

What To Look For In Your Client Portal



WHAT TO LOOK FOR IN YOUR CLIENT PORTAL

Choosing to implement a client portal is the first step. But next, it's important to explore all of the potential options. Every software vendor offers different solutions to its users, some more suitable to your business than others, so you need to determine your priorities and slowly eliminate your choices. It's also worth noting that most software vendors offer free trials, so signing up to a couple of those will help you in making your decision – as will requesting software demos.

So, is your main priority sharing online documents? Maybe it's remote access, or Google apps integration? There are a number of software solutions that will be ideal for all of the above. Whichever you find appropriate, you should consider that there are some bases your prospective client portal should cover before you make your final choice.

File Sharing

A file-sharing feature that allows you to securely share your documents with your team members and clients should be one of your top priorities when researching your client portal vendors. It's important to ensure that you can upload any document, be it small or large, PDF or .doc, and that they will be easy to view, edit, share and organise from within a secure cloud environment.

In today's world, with the instant availability of information at your fingertips, your team members and clients will want nothing less than instant access when it comes to your client portal; meaning that you need to make sure that your chosen tool will allow the team and clients to access all of their files, documents, events and tasks at the tap of an app or a click of the mouse (from anywhere, at any time).

Collaborating

Whether you need your client portal because you have a remote team, or because you want a solution that will help your office collaborate more efficiently; there's going to be something for everyone. By choosing a client portal that includes the following collaborative features, your bases will be covered for more effective teamwork:

- A variety of communication options, whether that's an integrated instant messaging feature, discussions forums or commenting feature
- The ability to create and assign tasks, events and deadlines, and the option to integrate your default calendar
- A simple and easy-to-navigate hub, where everything can be kept in one place, avoiding the confusion of emails and allowing group collaboration that will keep everyone up to date constantly

Project Management

Project management elements of a client portal can bring together the collaborative features and help to maximise your company's productivity. It's never been easier to digitally assign tasks, set deadlines and reminders, manage your team's calendar, and control file documentation; regardless of the geographical location of your team members and clients.

Keep those projects moving forward with team members certain of their responsibilities, and keep external members in the loop by choosing a client portal that allows you to securely integrate their email accounts, eliminating the need to add new members to your software unnecessarily.

Two-thirds of companies are communicating with clients using project management software.
([Capterra](#))

Client Relations

What will define your chosen tool to be a client portal is the level of involvement your client will have with the project. It is essential that the client will have the opportunity to be involved every step of the way when it comes to building trust between the business and the client.

You should be looking for software that will give you customisable permissions to control certain files, folders, discussions, tasks and internal conversations.

Security

Whether you're an accounting firm that is constantly exchanging sensitive information, or an advertising company that wants to ensure their ideas aren't stolen, every business wants to maintain a high level of security.

You will find that you can choose from a private cloud or a public cloud (or a hybrid cloud, which combines elements of the two): public clouds are based on shared physical hardware that is owned and run by third party operators (think: Google Drive or Dropbox), mostly suitable for personal use; then there are private clouds (think: Basecamp, or even Clinked), offering all of the practical, scalable and efficient features of the public cloud, but with the added security and control.



So let's say the client portal ticks all of the above boxes; you need to remember to analyse the simplicity and intuitiveness of the tool before you make your choice. It's all very well that the customer portal can deliver in terms of your required features, but if your team can't learn the software, then you won't get any results.

And don't forget to weigh up the scalability features of your software - think long term, utilise a tool right from the start that will give your client portal the opportunity to grow with your business.

Architecture

Depending on your security needs, you will often be able to choose between Public, Private or Hybrid deployment methods.

Private, public and hybrid clouds

Client portals are a type of cloud software. Third-party vendors host cloud software for individuals and organisations and can be accessed through the Internet. With cloud software, you'll often find that the third-party vendor maintains the cloud software. Maintenance can include: backups, updates and monitoring.

A public cloud is...

...Owned, operated and managed by third-party vendors. Hosted over the Internet, users pay a monthly/annual subscription to use their software. Many users are concerned over security when it comes to public cloud software, however most SaaS (Software as a Service) vendors have well-implemented security strategies to ensure that your data is protected from potential breaches.

A private cloud is...

...Provided behind a firewall. Using a private cloud solution would be the equivalent of having your cloud software installed on your on-premise servers. So, if one of your main concerns with cloud software surrounds data security, a private cloud could be the ideal solution for your organisation.

A hybrid cloud is...

...Where a single organisation combines both private and public cloud services in order to leverage resources from both cloud deployment models. Hybrid clouds give businesses the benefits of a low cost public cloud with the high security of a private cloud.

The Ultimate Guide To Client Portals

The Top Use Cases For Client Portal Software

Obviously, the way one business chooses to use their client portal will be completely different to how another organisation uses theirs. The point of this chapter is to take a look at some of the more popular ways in which client portal software is being used.

You'll find that client portals are relevant within most businesses. Most organisations share similar core business processes such as administration or marketing, which are just two areas where a client portal could benefit a company.

External File Sharing

Many organisations have endless documents and paperwork, which may need to be shared with external clients. If a client portal has external file-sharing capabilities, it can be incredibly useful because it reduces the need to add new members to your portal, when you may only need to share a single document with them.

Also, with the click of a button, users can upload their files into a structured folder system, like an intranet that is not limited. These functions eradicate the use of the out-dated and complicated FTP system.

Project Collaboration

You and your clients may need to be actively collaborating on projects. Perhaps you work in an industry where you require a constant flow of feedback or comments. With the ability to download files, or preview the files within your client portal, this makes life significantly easier for you and your clients, especially if you aren't based in the same place and work remotely.

Product Delivery

Depending on the nature of your business, you can deliver your product or service to your client through your client portal. Using an organised and private zone is much more efficient than email and doesn't risk the same issues of loss in a cluttered inbox.

THE TOP USE CASES FOR CLIENT PORTAL SOFTWARE

Task Management

Client portals are popular for the core organisation of your projects. Managing your targets and deadlines is a popular feature of a client portal. With comprehensive tools, you can plan all your individual tasks, assign deadlines and update your progress. This can help to give your client peace of mind due to them being able to see for themselves whether your project is on schedule.

Knowledge Repository

With wiki-like features allow organisations to establish a database of knowledge, which is indexed and searchable for your staff and clients. Because this information is virtualised, it is easy for your employees to find, meaning that they don't have to waste precious time traipsing around your office in search of the person with the specific information or document.

There are many other use cases for which client portals can be used. Your organisation can discover its own way to benefit from client portals. They're so customisable and adaptable which makes them a unique asset to your business.

(Originally written by Andrew for the Clinked Blog. You can view the post [here](#))



The Ultimate Guide To Client Portals

How To Create Your Client Portal

Whether you're an accountant, lawyer or management consultant, a client portal can be flexible enough to adapt to your particular business needs. It can boost client satisfaction, increase employee productivity and can save you time and money; it also allows for more flexibility, with telecommuting and remote work being a possibility for staff members, which can improve employee retention.

When it comes to implementing a client portal, you can either build one yourself, or choose to purchase client portal software. Choosing to build your own could prove costly and time-consuming, so for a business looking for a solution quickly, purchasing client portal software is likely to be the fastest and easiest option.

Aside from saving you precious time and money when compared with building your own, purchasing client portal software like Clinked can provide your business with a number of other benefits:

- Access to support from the professionals
- Easier IT maintenance
- Scalable pricing options to fit your business
- Easy implementation

...So setting up and collaborating has never been easier. You can get started within minutes, white labelling your portal and inviting members to start working on projects right away.

Setting Up

Setting up is simple. You can create an account and get on to creating your client portal right away. If you need any help with the process, one of the benefits of purchasing client portal software is that you'll have access to support in multiple forms, be it through online support, e-mail, phone calls, videos, demos, or a combination of them all.

You can create projects and groups, add team members, and get on to branding your client portal before you start collaborating on projects and sharing ideas. You can set up your optional mobile app too, as well as Google Apps integration and syncing your calendar.

Branding

A white-label portal will create a more personable environment for your team members and clients. Clinked gives you the option to customise your URL, login screen, logo, colour scheme and client portal terminology. You can also choose to white label your mobile app and Desktop SmartSync tool.

You can change your login screen, logo, colour scheme and portal terminology from your account settings. Excluding Enterprise customers, white labelling your URL, mobile app and Smart Sync application can be purchased as add-ons to your existing client portal.

Collaborating

When your client portal has been set up and branded, you can start collaborating with your team members and clients. Finalise and approve documents, discuss new ideas within groups, plan events with your team and clients, and set tasks and deadlines for your members.

There's also the ability to collaborate with team members and clients that don't have 'user' status within your Clinked client portal – it's quick and easy to share documents and folders externally, with optional password protection and an expiry date and time for additional security.

You can also collaborate remotely with the mobile app and SmartSync desktop tool. With SmartSync, you can choose to automatically or manually sync your documents. Your chosen files and folders will be more accessible to your team members and clients.

The Ultimate Guide To Client Portals

5 Tips To Help You Get More Out Of Your Portal

5 TIPS TO HELP YOU GET MORE OUT OF YOUR PORTAL

The basic concept of a client portal involves: the ability to create individualised accounts for each member whom you conduct business with, granting them access to certain files and folders in which your company have stored and shared securely, as well as being a private place in the cloud where you can communicate with your clients with the additional collaborative features that client portals offer.

As we've already covered through this e-book, client portals are ideal for businesses working in industries where dealing with sensitive data day-to-day is the norm, such as Law or Accountancy firms. However, more and more companies are beginning to see other intangible benefits of using SaaS (software-as-a-service), such as improved collaboration between departments and improved customer engagement.

However, being able to get the most out of your client portal is just as important as choosing to implement one in the first place. That being said, here are five tips to make sure you can make the best use out of your software.



Choose the right client portal software

With the countless variations of cloud-based software out there, it can be stressful trying to find and implement the ‘perfect’ client portal solution for your company.

You want to find a balance: you need the client portal to provide you with the features you need to collaborate better, without having too many to confuse your clients and become counter productive. Consider your priorities and go from there: perhaps it’s multi-factor authentication for security reasons, Google Apps integration, or white label branding so your client portal can blend seamlessly with your website; then keep the rest as simple as possible.

(For more guidance you can refer back to Chapter 4)

Get everyone on the same level

You may have integrated your client portal, but does everyone in your team – and your clients – know how to use the software to its full advantage?

By training your members how to use the software properly you’ll be able to get maximum usage out of your client portal, limiting the user errors and confusion that can come as a result of lack of understanding and incompatibility between user and software.

Make use of the mobility features

Even if everyone is on the same page with the main features of your client portal, you can still get even more use out of your software by encouraging them to take the features mobile.

[Clinked](#) as an example, is available as a mobile app and a SmartSync desktop app. This means that clients and team members can collaborate everywhere, not just from their desktops in the office. And the SmartSync desktop app makes it easier than ever to store your documents, emails, pictures in the cloud and access them from any device. Making use of these mobility features makes collaborating that much more efficient.

Customise your client portal

Your client portal will undoubtedly have customisation options, and you don't need to be a design/tech expert to create a personable space for your clients.

The amount of customisation available will depend on your chosen client portal 'package' however, so it could be as simple as having the ability to change the colour scheme, update the logo and customise access to applications; or you could have the opportunity to go as far as completely re-designing the portal to match your corporate branding guidelines.

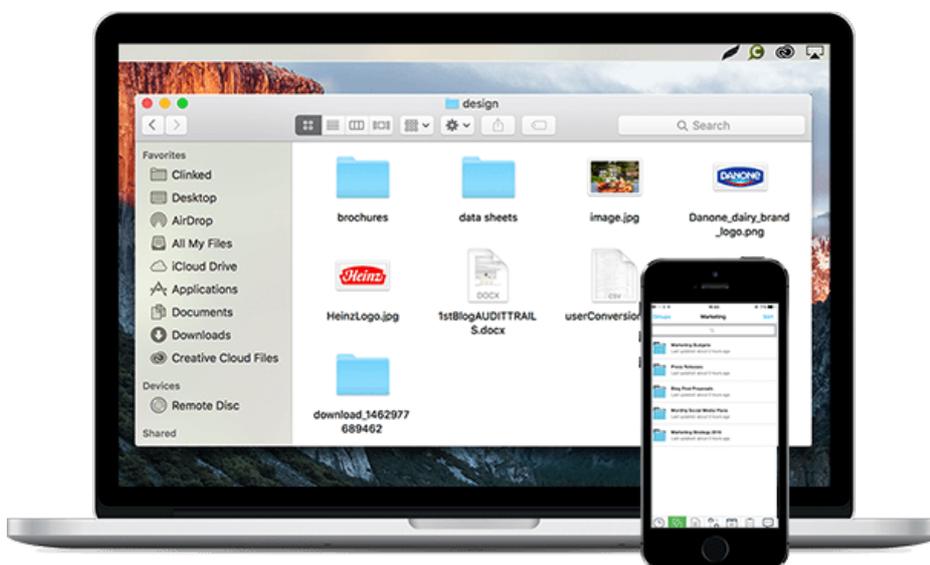
Either way, making use of the customisation features can make your business and clients feel more 'connected' to the portal.

For more guidance you can refer back to chapter 6.

There's support if you need it

One of the main benefits of cloud-based software is the support that you have access to from the software vendor.

You have the advantage that you're able to get on with running your business with the confidence that you don't have to worry about the technical aspects of your client portal; for example keeping your data safe and ensuring that your infrastructure is running smoothly, as well as having them there as a troubleshooting guide for any other issues.

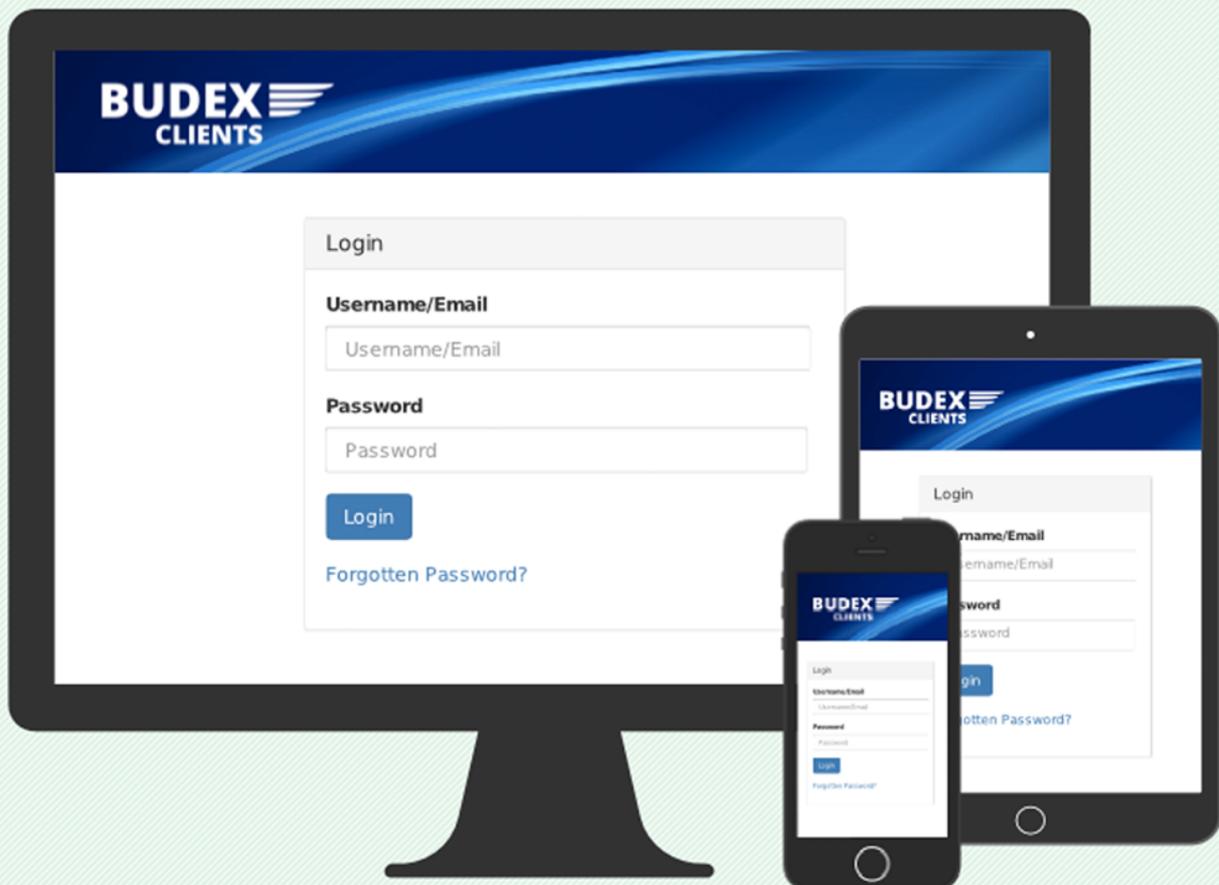




Interested in finding out more?

Clinked is a white label file sharing, team collaboration and client portal for businesses. If you want to find out more about our solution, visit -

www.clinked.com



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