

THE ULTIMATE B2B PORTAL GUIDE

How to move forward
the smart way

vincit

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**DO YOU WANT
TO TRANSFORM
YOUR OFFERING BY
COMBINING DIGITAL
SALES, SERVICES,
AND EXCELLENT
CUSTOMER
EXPERIENCE?**

WE DO.

The general white noise in the market pushes B2B companies to renew their entire digital sales stack or CX architecture with the promise of becoming future-proof and relevant to their customers by going composable.

Composable commerce is not just hot air – but it's also not a silver bullet. Starting with the architecture is putting the cart before the horse. It makes more sense to first set out your strategic goals, define a winning solution targeted at your customers, and then pick the best architecture to suit your needs.

That's how we work at Vincit. Read on to learn more.

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WHY A PORTAL IS A GOOD SOLUTION FOR B2B

Take our word for it – a portal is a smart investment for most B2B companies. Portals allow you to become a one-stop shop for stakeholders and help you to up-sell and cross-sell your products and services while providing a great customer experience. Portals break down internal silos and give you a single source of truth about your customers so you can engage them with relevant self-services and content.

A portal also meets your stakeholder needs as they expect to be able to do things online. According to research:



74% of B2B buyers stated that they expect their suppliers to have an online self-service portal.
— Forrester Research



75% of customers expect companies to deliver personalized interactions. And 76% get frustrated when this doesn't happen.
— Accenture



71% of B2B buyers prefer to buy from websites, and 93% prefer to buy online when making purchases valued at over \$50,000.
— McKinsey & Company



What is a portal?

B2B portals are networks of online interconnected services that enable collaboration and value creation for stakeholders, such as customers or partners.

Many companies, especially in manufacturing and wholesale, are investing in B2B portal initiatives to offer their stakeholders a single digital touchpoint that provides all or near-all means of collaborating and doing business with the company. This can be a portal for customers and/or partners.

Portals reflect a strategic shift to create a more personalized, integrated, convenient, and efficient stakeholder-facing touchpoint. The goal is to improve the stakeholder experience while reducing workload and costs on the vendor sales and customer service side – especially in global business where it's difficult and expensive to offer 24/7 contact points for customers.



What kind of portals are there?

When it comes to portals, they typically serve many stakeholders. The most common are customer portals and partner portals.

CUSTOMER PORTALS

A B2B customer portal is a self-service online platform that enables business customers to access essential information and perform transactions easily. The portal provides features such as account management, order placement, order tracking, payment processing, and access to personalized product catalogs, contracts, and pricing. This includes portals for B2B companies that do not sell their assets online but want to provide a place to provide related services – like documentation, education, and customer service.

A portal streamlines communication, reduces dependency on support teams, and improves the overall customer experience by offering 24/7 access to resources and tools. By centralizing key functions, a B2B customer portal improves operational efficiency, customer relationships, and loyalty.

PARTNER PORTALS

A B2B partner portal is an online platform designed to facilitate collaboration, communication, and resource sharing between a business and its partners, such as resellers, distributors, or vendors.

A portal provides access to essential tools, such as training materials, sales resources, marketing assets, pricing information, and performance analytics. It streamlines workflows by allowing partners to manage leads, track sales progress, and access support services in one centralized location. A B2B partner portal helps build stronger relationships, boosts partner productivity, and drives mutual business success.

THE STARTING POINT: WHAT'S YOUR STRATEGIC AIM?

What kind of portal should you build?

B2B portal initiatives are driven by varying strategic objectives – viewed from both the business goal and the stakeholder value and experience perspective. These strategic priorities serve as drivers and a compass for decision-making throughout the different phases of design and development for said portal initiatives.

In an operating environment consisting of a broader ecosystem of digital services, it's essential to be clear about the relationships between different services and service layers. This involves how they are perceived by the stakeholders and how they function and are integrated, both from a business and technical architecture perspective.

You need to determine where your strategic aim is among the following options to best determine what kind of portal to build:

SALES AND ORDERS

Searching and comparing products, ordering, order and delivery tracking, quotes, contracts, cross-selling, and up-selling.

SELF-SERVICE

Streamline processes and empower self-service to ensure savings in administrative and operational expenses. After-sales tools strengthen the connection with customers and partners. Self-service also includes documentation like product sheets, safety instructions, and certificates.

DATA-DRIVEN INSIGHTS AND PERSONALIZED EXPERIENCES

Turn data into actionable insights and take advantage of AI, enabling businesses to personalize experiences, optimize operations, and use predictive analytics or maintenance.

ENHANCING COMMUNICATION AND COLLABORATION

Improved interactions between vendors, customers, and dealers foster stronger relationships and a sense of partnership.

THE BUSINESS DRIVERS FOR B2B PORTALS

Here are some examples of how B2B portal can transform your business:

COMPETITIVE EDGE

Investing in portals is crucial for staying ahead of the curve when it comes to competing and differentiating your business. A well-crafted portal enhances a company's standing among stakeholders and customers.

SUPERIOR CUSTOMER EXPERIENCE

Today's customers, both in B2C and B2B, demand seamless, personalized experiences. A single digital touchpoint like a portal can address these expectations. With a portal, sales can focus more on key customers, and it's easier for sales and customer service to create offers and provide better information.

REDUCING COSTS

Streamline processes and empower self-service, leading to substantial savings in administrative and operational expenses.

STREAMLINING BUSINESS OPERATIONS

B2B portals centralize operations and provide real-time access to critical information. For example, manufacturing companies can benefit from improved supply chain management and inventory control.

GLOBAL REACH AND ACCESSIBILITY

B2B portals transcend geographical boundaries, enabling seamless access from anywhere in the world and 24/7 support. This facilitates business expansion across borders and into new markets.

ENHANCING COMMUNICATION AND COLLABORATION

Vendors, customers, dealers, and partners can interact seamlessly within the portal. Improved interactions foster stronger relationships and a sense of partnership.

DATA-DRIVEN INSIGHTS AND PERSONALIZED EXPERIENCES

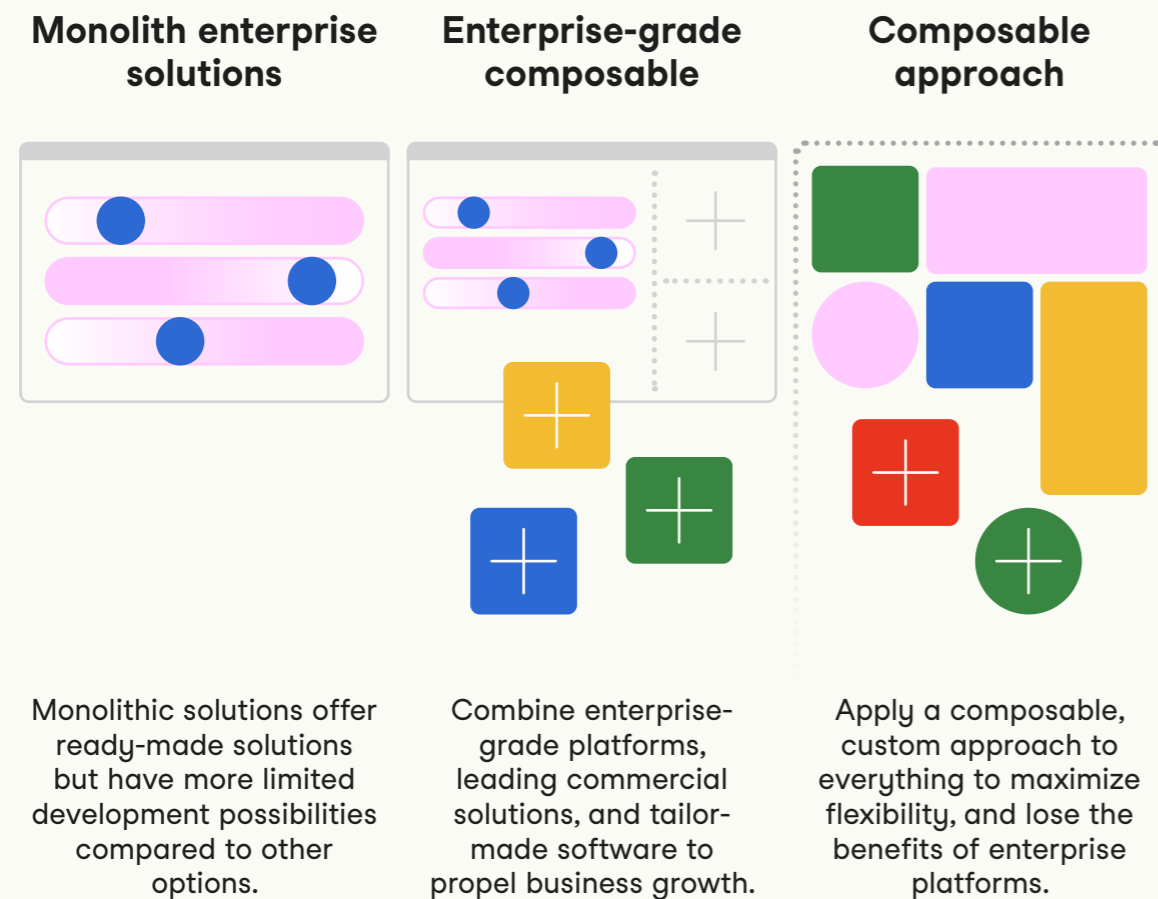
Turn data into actionable insights, enabling businesses to personalize experiences and optimize operations. By analyzing user behavior, businesses can tailor offerings to enhance engagement and satisfaction, driving efficiency and profitability.

EFFICIENT ORDER MANAGEMENT

Portals streamline order placement and management, for example, bulk orders and automating fulfillment, custom pricing, order templates, project/site-based order tracking, and reporting.

DIFFERENT TECHNOLOGY SOLUTIONS

There are many ways to create a portal, and the best method depends on your strategic aim – which will influence the design and features you offer in the portal. We help you choose the best solution for your business.



B2B PORTAL REFERENCE ARCHITECTURE

Once you've set out your strategic aim and designed the portal, the next step is to pick the architecture approach that will lead to the most effective result. The options are:

1. CMS-CENTRIC APPROACH

Using a common content management system as the basis for your portal. Great for content-centric portal needs, but might add limitations to development in other capabilities, such as digital commerce.

2. DIGITAL EXPERIENCE PLATFORM APPROACH

Utilizing an all-in-one type of platform to build the portal, that provides capabilities like content management, commerce, customer engagement etc.

3. CUSTOM-BUILT APPROACH

Custom software approach to portal development. Frontend and backend capabilities are cloud-based custom components. Suitable approach if the portal requirements don't fit any typical commercial product capabilities.

4. COMPOSABLE APPROACH

Composable and layered portal architecture consisting of best-of-breed solutions, including enterprise and SaaS platforms (e-commerce platform, PIM, CMS) as well as custom-made components (front end, integrations).

HOW TO MOVE FORWARD THE SMART WAY

What's the best way to get started with a portal project? We use a proven methodology based on three steps: discovery, definition and decision-making, and build-measure-learn.

Step 1. Discovery

Discovery projects set a solid foundation for B2B portal initiatives and a good basis for change management. Discovery crystallizes the business, process, and user/customer needs, sets a clear target state, and prioritizes needed actions. A discovery project aims to ensure that you can create a business case to enable educated decisions and investments that support your strategic business objectives. The following parts make up a discovery project:

CURRENT STATE

We focus on understanding the key needs, challenges, and expectations of your business stakeholders and analyze the available data. We also get relevant stakeholders engaged in the project.

- Strategy and business goals
- Customer experience and current touchpoints
- Operating model and business processes
- Current architecture

TARGET STATE

We design the target state and create a gap analysis between the current and future state. This part of the discovery step prioritizes development needs and use cases for the portal.

- Target state
- Business drivers
- Gap analysis between current and target state
- Prioritizing development needs
- Prioritizing use cases & data needs

WAY FORWARD

We clarify the way forward and create a vision of the future architecture as well as a high-level roadmap to achieve the set target state. Initial business and technical requirements can be set.

- Architecture vision
- High-level roadmap
- Change management plan
- Business requirements
- Technical requirements

ROADMAP

A compact discovery phase is followed by decision-making, guided by the roadmap created in the discovery project.

Step 2. Definition and decision-making

Now it's time to define the portal and make decisions. This includes:

Investment decision: build the business case to know if you will proceed or not

Scoping in detail: what features are going to be included?

Concepting: what are the business targets and value provided to customers and partners? Which customer groups will you serve, what are the primary use cases, and what will the portal look like and how will it function?

Platform evaluations: which platforms can fulfill the needs set out in the scoping and concept phase?

Technology decisions: what will the technology approach be?

Roadmapping: how will you implement the solution? It often makes sense to deploy in smaller increments and more often, which supports a "build-measure-learn" approach.

Step 3. Build-Measure-Learn

When the direction and goals are clear, the next step is to develop the B2B portal with an agile "Build-Measure-Learn" method. At the core of "Build-Measure-Learn" is continuous learning. The aim of the approach is to learn fast and minimize risks.

What has been built is measured continuously against what was aimed to be achieved (business goals), and based on the results, we can derive the needed iterations to improve.

It's important to ensure that the process allows learning and making rapid changes based on the results possible. That way we minimize risks and improve the quality of the end result constantly.



THE BENEFITS OF OUR APPROACH

Our approach is based on a history of successful portal projects for B2B companies. You'll get the following benefits from working with us:



SMART & ON-TIME DECISIONS

A clear vision of the target state and a shared understanding of priorities helps to make smart decisions at the right time.



SET UP FOR SUCCESS

Engaged stakeholders, a clear roadmap, and “Build-Measure-Learn” methodology ensure that we move towards the goal together.



BUSINESS, PEOPLE, AND TECH COMING TOGETHER

Our approach considers your business, people, processes, and tech and helps to make sure that solutions are built to support them all.

CHANGE MANAGEMENT IS KEY

Change management is critical to ensure the success of a B2B portal project. There are always challenges and complexities when rolling out a new system. Portals are implemented in multiple phases and they are under constant change. Portals change how your organization interacts with customers. In order to automate and enable self service, portals also bring new requirements for the organization related to processes and data management, meaning harmonization of data and processes is required from the organization. This makes change management a critical success factor for the whole initiative or program.

A proper change management process can help with the following:

USER ADOPTION

A B2B portal represents a big change for employees, partners, and customers. Change management ensures that stakeholders are adequately trained and informed, helping them understand the portal's benefits and how it aligns with their workflows, encouraging adoption. Incentives should be considered for sales, customer service, and other people in the organization to onboard their customers. You also should consider incentives for end-customers to switch to self-service over the portal.

The incentives for organizations could include:

- changing the bonus models for the organization
- rewarding people/teams that have a good adoption level

The incentives for end-customers could include:

- discounts
- better payment terms
- faster lead times
- prioritized availability

ALIGNMENT WITH BUSINESS PROCESSES

Implementing a new portal often requires adjustments to existing processes. Change management ensures these processes are analyzed, optimized, and communicated effectively, reducing disruptions and improving efficiency.

MANAGING RESISTANCE

People sometimes resist change, especially if they are unclear about its purpose or impact. A structured change management approach identifies potential resistance points and addresses them through communication and support. Incentives can also help increase adoption.

COMMUNICATION AND STAKEHOLDER BUY-IN

Effective change management prioritizes clear, consistent communication about the project's objectives, timeline, and benefits. This transparency builds trust and ensures stakeholders at all levels are on board.

TRAINING AND SUPPORT

For a B2B portal to succeed, users need to understand its functionality. Change management ensures that adequate resources, such as training sessions and guides are in place to support users throughout the transition.

REFERENCE: iLOQ

iLOQ replaces mechanical and electromechanical locking systems with sustainable solutions that eliminate the problems related to copying and losing keys, at the same time reducing both maintenance needs and life cycle costs. At the core of their work is their dealer-partner network.

We created a partner portal for iLOQ. The portal provides tools for personnel know-how, customer support, marketing, branding, and innovative business development. In addition, the iLOQ Partner Portal was designed as a channel that makes handling daily routines easier. The portal enables information distribution, communication, and order-placing to run smoothly.

Managing the end customer's life cycle in a holistic way provides several points where the dealers can make a positive impact. The iLOQ Partner Portal pays attention to every link of the service chain and all their partners' needs. In addition, the portal is a part of iLOQ's continuous change towards better practicality, economy, safety, and sustainability. The portal enables high-quality digital partner experiences, helps dealers to work with end customers, and offers tools for more innovative business development.



REFERENCE: OUTOKUMPU

Outokumpu is a leading stainless steel producer. Outokumpu Connect is a commerce-driven customer portal that enables better digital services for customers and increased sales for Outokumpu. Vincit partnered with Outokumpu to design and implement the overall solution in only a little over six months.

Outokumpu's online sales and service portal is a key part of the company's ongoing digital transformation. The new customer portal allows Outokumpu's customers to see availability and prices 24/7. They can take advantage of a wide range of services such as ordering products, checking delivery and invoice status, and managing documents without having to contact Outokumpu sales and waiting for a response.

Outokumpu can also more easily handle small inquiries and grow their digital business. The new portal helps salespeople to save time and effort by automating the sales process. The amount of customers and placed orders is increasing all the time due to the expansion of the sites and regions the solution covers.





Let's discuss how a B2B portal can transform your business

We know how to build a best-in-class portal for your organization that will meet stakeholder expectations, break down silos, and give you a single source of truth about your customers.

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