



Customer Portal: creare esperienze self-service

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Founded in 2004 at Diamond Bar, California, Liferay is a global company

24 offices in 19 locations

+ 1.500 enterprise customers

+ 250 partners in 40 countries

+ 150 in EMEA



Liferay is a **Leader** for the **Eleventh Time** in the Gartner Magic Quadrant for **Digital Experience Platforms**

Figure 1: Magic Quadrant for Digital Experience Platforms



Source: Gartner "Magic Quadrant for Digital Experience Platforms" by Irina Guseva, Mick MacComascaigh, Mike Lowndes, 26 January 2021.

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Liferay: Endless Solutions



**Dealer & Agent
Portal**



**Self Service
Customer Portal**



**B2B
Business Portal**



**Commerce
B2B, B2C**



**Collaboration
Portal**



**Integration Platform
(BI, IoT)**



**Digital Workplace &
Intranet**



Analytics



What is Self Service?

Digital experiences that **empower users** with the tools to **find the information they need** and have a better experience with the product or service, **without the assistance of a service rep**



Impact of Challenges

Challenges organizations face today:

1 **HIGH CALL VOLUME**

Simplification, automation, and cost of interactions

2 **DISPARATE DATA**

Service gaps brought on by system silos

3 **INCONSISTENT INFORMATION**

Meeting customer expectations and increasing satisfaction

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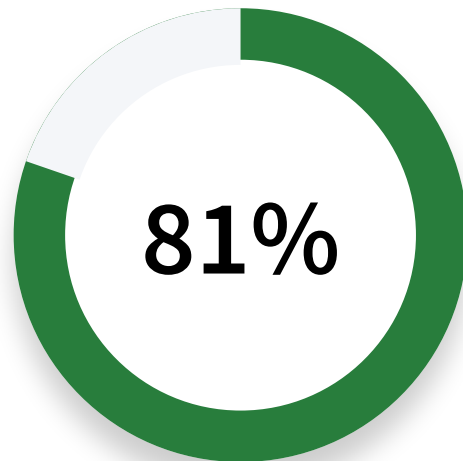
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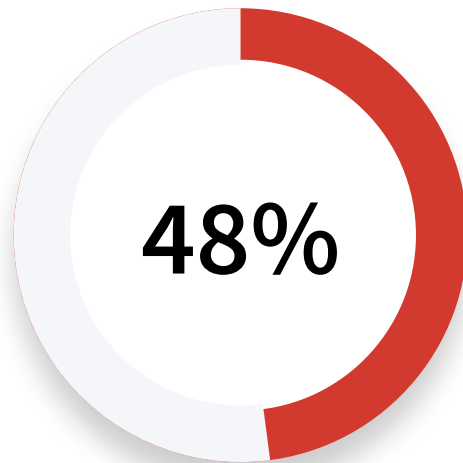
Meeting customer expectations and increasing satisfaction

Self-service experiences are spread across multiple touchpoints, making it difficult to manage.



In 2019, 81% of customers **tried to solve** problems **before** contacting a rep

Many companies struggle to deliver efficiency, meaning customers aren't supported when trying to solve their own issues.



Only 48% of a company's customer service interactions **started with self-service** in 2019

What it means for you

- ✓ Decrease costs
- ✓ Increase high value interactions
- ✓ Shift your business to modern experiences

CUSTOMER
PORTALS

The image displays a web browser window showing the 'Review your claim' interface for RayLife. The interface is divided into several sections for data entry:

- Involved Insurance Holder:** Jane Doe, 1-123-456-7890.
- Involved Vehicle:** 2015 Fiat 500, VIN: SDLKJ23PL8SLFJ.
- When and Where:** Date: 10/12/2018 2:30 pm, Location: 1400 Wilshire Blvd, Los Angeles, CA 90030.
- Type of Incident:** Vehicle incident while driving.
- Incident Detail:** Incident with another vehicle.
- Other Driver's Vehicle:** 2013 Honda Accord, SEFICL348V39FVSL3, 7ABC123.
- Who was in the other vehicle?:** Paul Smith, Mercury 123-EXEC-34MC-WL3S.
- Condition of Your Vehicle:** Damaged but safe to drive.
- Damage Photos:** A grid of four placeholder images for damage documentation.

At the bottom of the web form are buttons for 'Submit Claim', 'Save as Draft', and 'Cancel Claim'. To the right, a mobile app interface is shown, displaying a '3. Review' screen with the same claim information in a condensed format.

Reduce Calls



Empower customers



Surface relevant information



Deliver self-service functionality



Results



Better User Experience

Intuitive user interface makes it easier for customers to use the self-care portal.



4x Increase in Website Traffic

The improved user experience and self-service tools brought in more website traffic and users.



5x Increase in Customer Sign-ups

Customers can now onboard themselves in 10 minutes compared to hours or days with other service providers.



7x Increase in Monthly Revenue

The steady rate of new customers also means revenue growth.

Knowledge Base



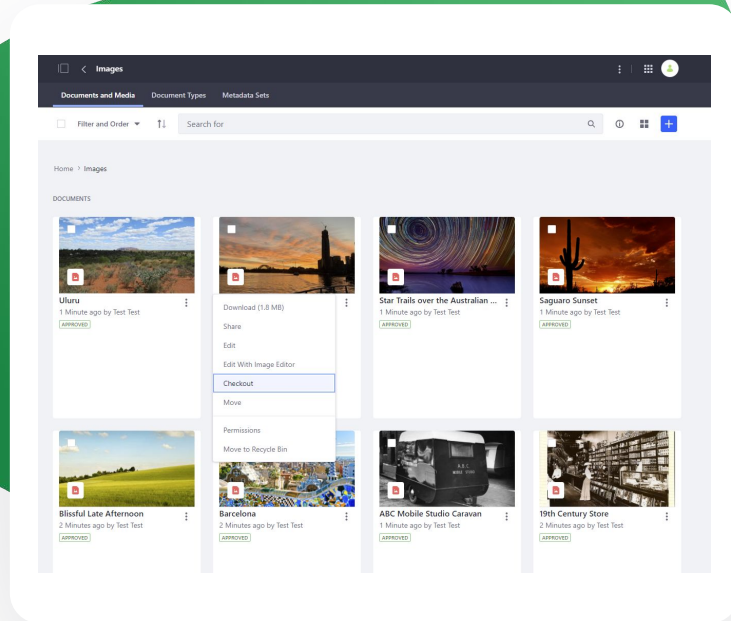
Content Management



Personalization



Performance Metrics



Audience Isolation

Content Management

Personalization

Performance Metrics



Unify Touchpoints



Integrate existing systems



Reduce costs



Unlock the potential



Results



Uniting Sites

Unlocking different systems safely and easily with SSO



Accessible Experiences

Improved experience for all audiences



Empowering Business Users

Growth of visitors and contributors for the internal community



Dynamic Content

Relevant content for the audience and user

Single Repository



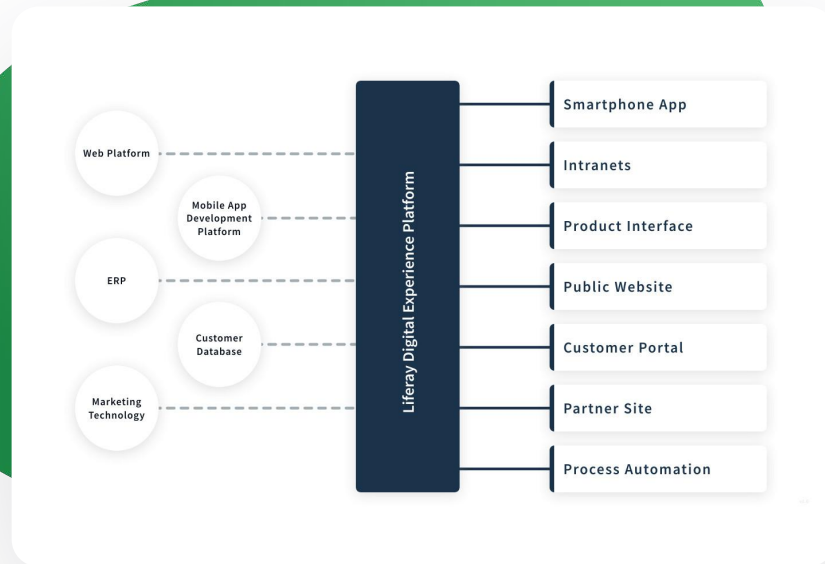
Data Integration



Zero Downtime



Forms & App Builder



Business Continuity



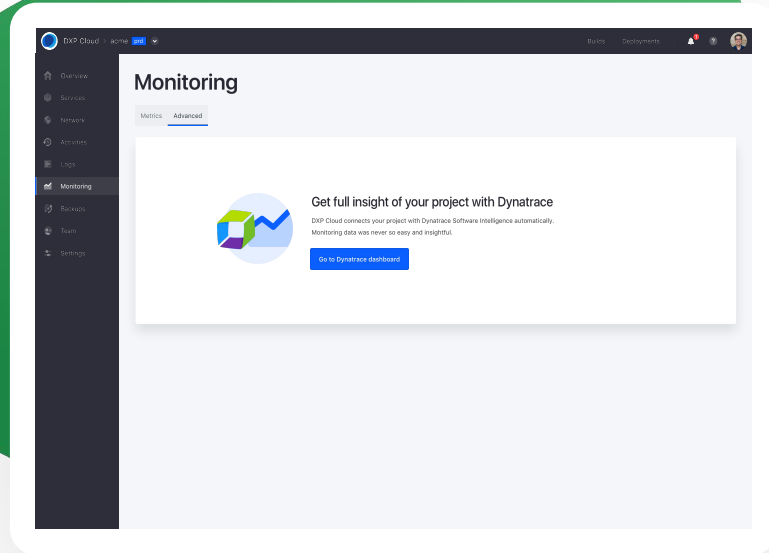
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Zero Downtime



Forms & App Builder



Customer Friendly

Data Integration

Zero Downtime

Forms & Objects

The screenshot displays the Liferay 'Edit Form' interface for a 'School Enrolment Form'. The main content area is divided into two sections: 'Your Details' and 'Details about your Child'. Each section has a 'Title' field with a dropdown menu labeled 'Choose an Option'. The 'Your Details' section includes fields for 'First Name*', 'Last Name*', 'Your Address' (with a placeholder 'Start typing your address and it will autofill for you'), 'Phone Number', and 'Email Address'. The 'Details about your Child' section also includes fields for 'First Name*' and 'Last Name'. A 'New Page' button is located between the two sections. On the right side, there is a sidebar titled 'Add Elements' with a list of form elements: Paragraph, Text, Select from List, Single Selection, Multiple Selection, Grid, Date, Numeric, Image, Rich Text, Upload, and Color. Each element has a brief description of its function.

Bridge Service Gaps



Build powerful tool kits



Evolve the customer journey



Capture customer feedback



Results



Efficient Service

Customer dashboard makes paying bills easy



Greater Accessibility

Mobile-responsive dashboard gives consistent functionality



Flexible Management

Customers can switch between multiple accounts



Reduced Issues

Billing integration reduces delays, improves satisfaction

Brand Control



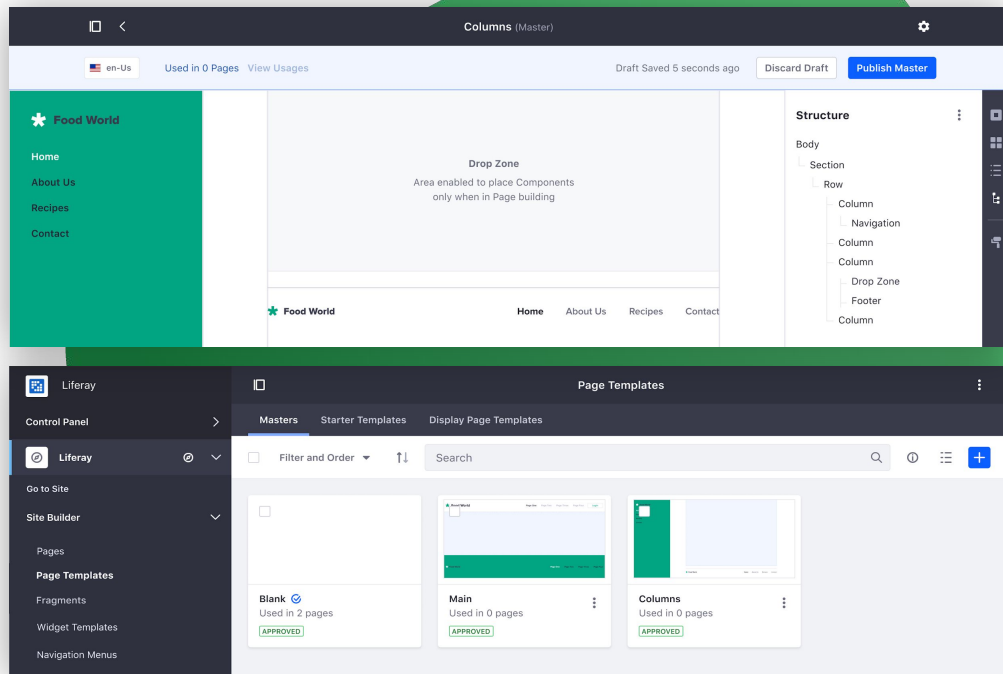
Design Systems



Publications



Content Recommendations



Team Collaboration



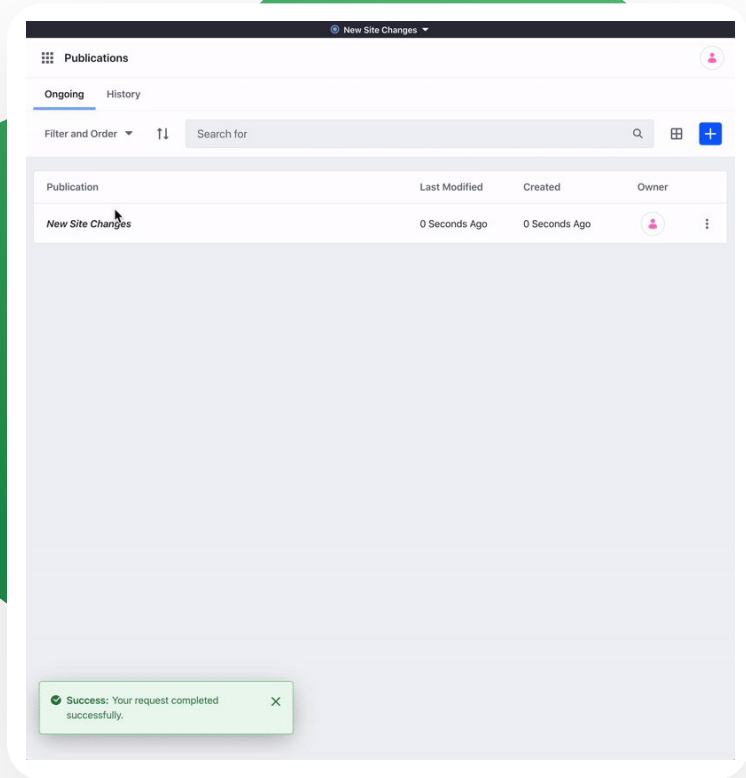
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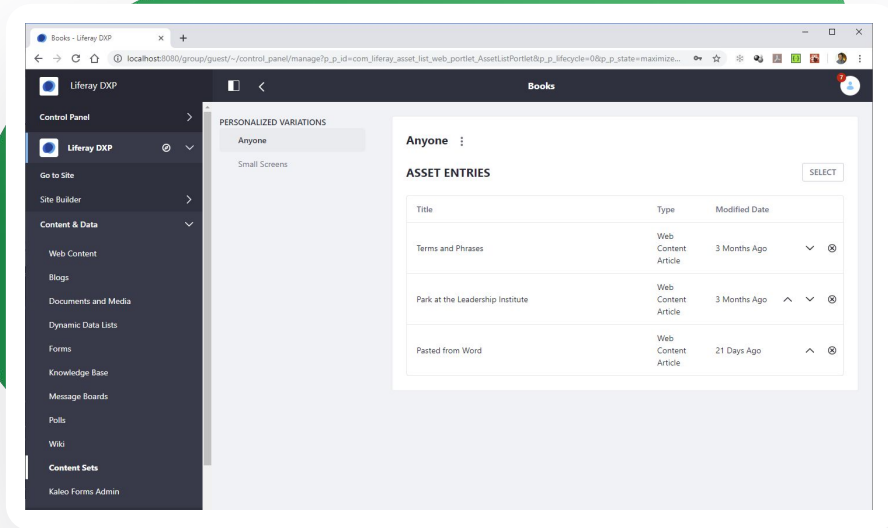


Surface Relevant Information

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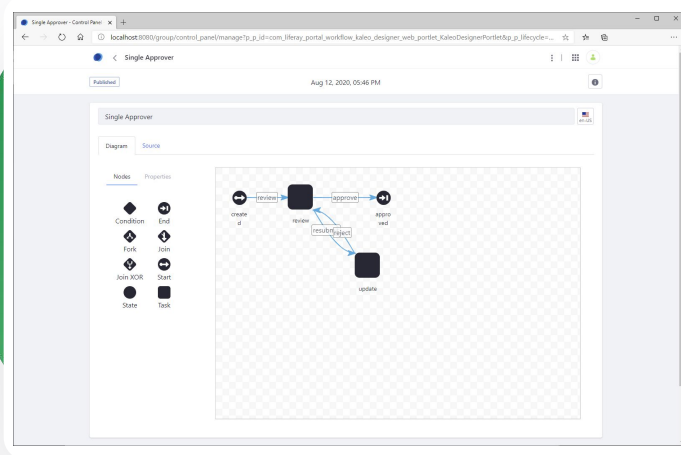
Building Business Processes

Process Builder

Allows users to define any number of workflows through a drag, drop & configure web interface

These processes have knowledge of users, groups and roles.

Liferay DXP also allows users to create their own workflow and define the number of approval paths based on their own unique business requirements and operational needs. For example, administrators can implement an approval process for new document uploads before they appear in the Document Library.





**Empower companies to
provide better value to
their customers**



Thank you!