



IBM Software Group | IBM WebSphere Portal Live!

IBM WebSphere® Portal Live!

Business Agility, Innovation and Responsiveness

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Agenda

- **Business Challenges**
- **Portal Benefits**
- **WebSphere Portal Case Studies – NAB & AMP**
- **Quantifying the Value of IBM WebSphere Portal**

The Rise of Portals

- A Framework that aggregates multiple applications and systems
- Delivers a highly personalized experience
- A single access point for all users to information and applications required in their jobs
- Provides application integration, collaboration, single sign-on services and much more





So what are the issues?

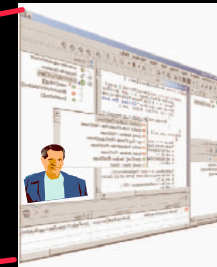
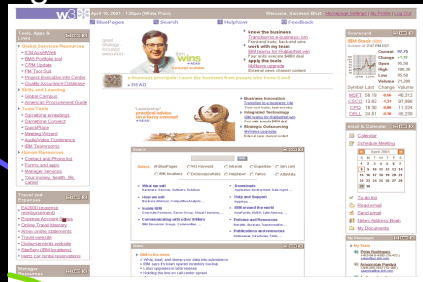
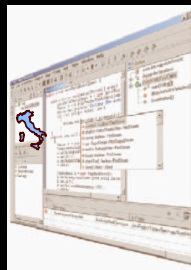
- 1. Users need access to many applications that have different User Interfaces**
- 2. Building web systems from scratch is time-consuming and costly**
- 3. Web systems need to integrate smoothly with business applications (eg Legacy) that provide services**



On Demand Workplace = integrated access to people, processes and information...using common, efficient, standard platform tools

In-Side (b2e) Workplaces

- Enterprise wide communications
- Common management platform of selected corporate functions
- Branding your way of doing business



Sell-Side (b2c) Workplaces

- Customer services brand management
- Personalized customer marketing/sales
- Multi-channel sales integration
- Web based customer service delivery

Buy-Side (b2b) Workplaces

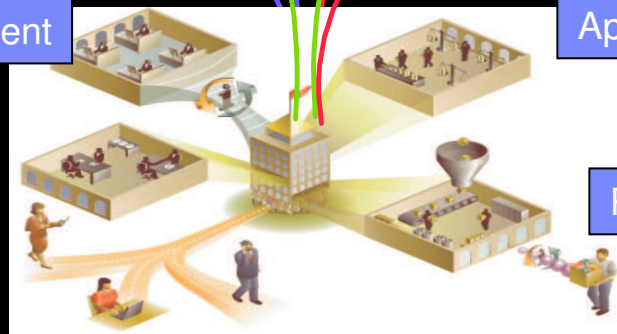
- Collaborative supply chain transactions management
- Personalized partner relationships
- Integrated with supply chain applications & processes

Content

Applications

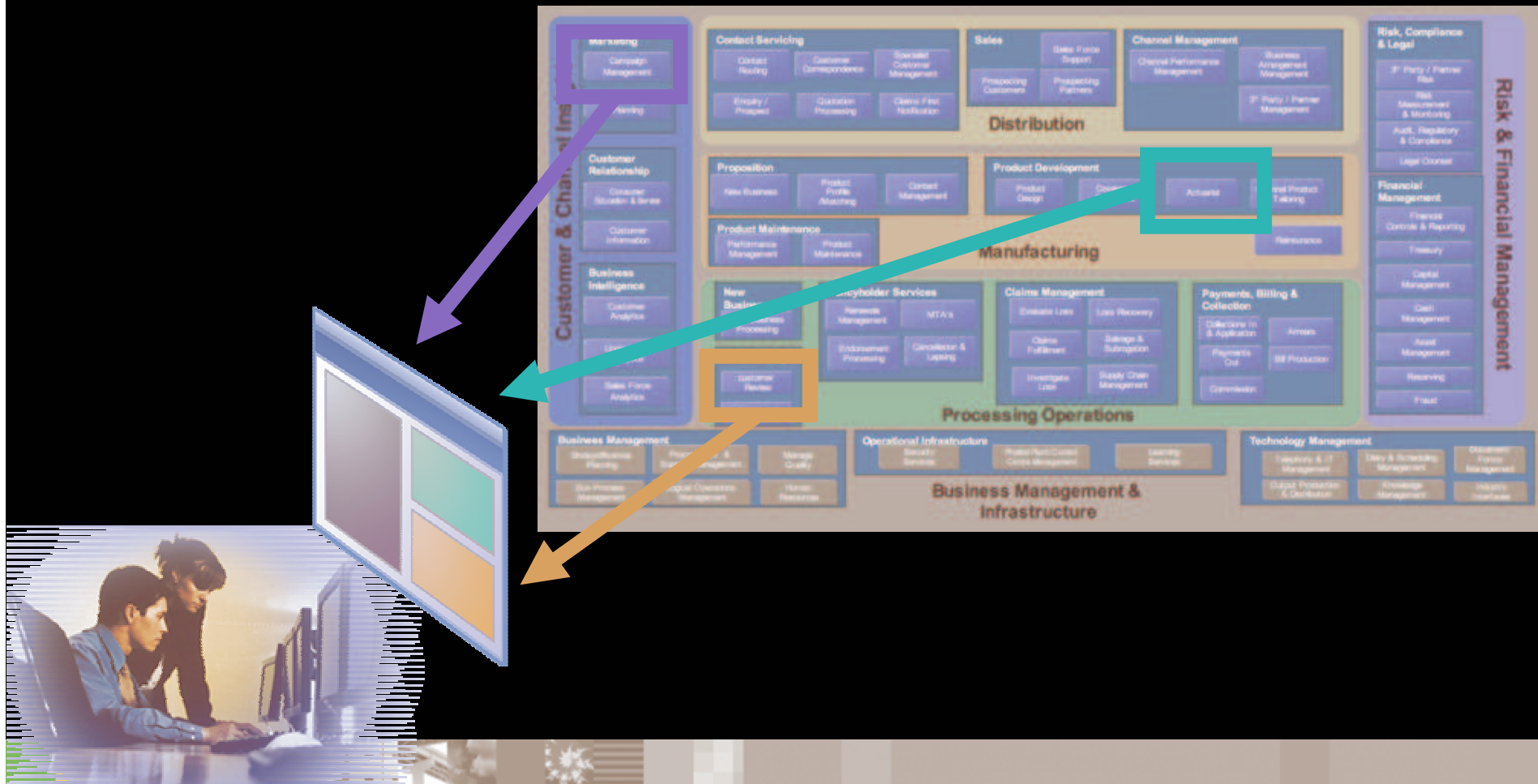
Processes

People



Portals & Service Oriented Architecture

Each user (employee, customer, partner) interacts with a set of the business services to perform common transactions and collaborate with others to derive value from the infrastructure.



Dashboard using Websphere Portlet Factory

The screenshot displays a web browser window titled "IBM WebSphere Portal - Microsoft Internet Explorer". The page features a "CUSTOMERFIRST" header with a navigation bar containing "Sales Home", "Forecast", "Customers", "Welcome", and "Myflows".

Alerts Portlet: Lists various alerts under three categories: Order Alerts, Account Alerts, and Company Alerts. Each alert includes a subject line, a date, and a time.

Revenue Scorecard Portlet: Shows a table of bookings for the Boston office, categorized by sales manager.

Status	Rep	Actual	Plan	Difference	% of Plan
On Track	Jane Louk	\$430,299	\$400,000	\$30,299	107.56
On Track	Bob Thomson	\$440,682	\$430,000	\$10,682	102.49
On Track	Joie Perez	\$381,100	\$177,000	\$204,100	182.32
Below Quota	John Smith	\$100,000	\$100,000	\$0	100.00

Revenue Portlet: Includes a "Query Filter" for "Sales Manager" (Jane Louk) and a "Year to Date Bookings vs. Quota" gauge chart. The gauge shows a current value of 430,258.73, which is in the "On Track" (yellow) zone. The legend indicates: Below (red), On Track (yellow), and Exceeding Quota (green).



Flexible and Powerful Workplace Dashboard Framework

Workplace Dashboard Framework is a set of reusable assets, robust administration tools, and dashboard-specific features that speed the creation of custom dashboards.

<h3>Reusable Components</h3>	<h3>Business User Configuration</h3>	<h3>Hi-Fidelity Charting</h3>																																							
<h3>Centralized Admin. Console</h3>	<h3>Robust Alerting Module</h3> <table border="1"> <thead> <tr> <th>Priority</th> <th>Status</th> <th>Alert</th> </tr> </thead> <tbody> <tr> <td colspan="3">Accounts (View All)</td> </tr> <tr> <td>Urgent</td> <td>Read</td> <td>AMTEC POC stage 1 has completed</td> </tr> <tr> <td>Urgent</td> <td>New</td> <td>AMTEC SOW due in 3 days</td> </tr> <tr> <td>High</td> <td>New</td> <td>AMTEC customer support request resolved</td> </tr> <tr> <td colspan="3">Sales (View All)</td> </tr> <tr> <td>Urgent</td> <td>New</td> <td>Deal Closed - MegaCorp!</td> </tr> <tr> <td>Urgent</td> <td>New</td> <td>Acme opportunity regressed to stage 4</td> </tr> <tr> <td>High</td> <td>New</td> <td>Globe travel - New opportunity > 1,000,000</td> </tr> <tr> <td colspan="3">Financials (View All)</td> </tr> <tr> <td>High</td> <td>New</td> <td>Dollar down compared to Euro</td> </tr> <tr> <td>High</td> <td>New</td> <td>YTD ROE on track</td> </tr> <tr> <td>High</td> <td>New</td> <td>YTD Operating Profit is at least 2% above target</td> </tr> </tbody> </table>	Priority	Status	Alert	Accounts (View All)			Urgent	Read	AMTEC POC stage 1 has completed	Urgent	New	AMTEC SOW due in 3 days	High	New	AMTEC customer support request resolved	Sales (View All)			Urgent	New	Deal Closed - MegaCorp!	Urgent	New	Acme opportunity regressed to stage 4	High	New	Globe travel - New opportunity > 1,000,000	Financials (View All)			High	New	Dollar down compared to Euro	High	New	YTD ROE on track	High	New	YTD Operating Profit is at least 2% above target	<h3>Flexible Filtering</h3>
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Benefits Portal Delivers

Pain Points

Portal Solution

1. Hard to find the right information.



1. Role based Employee Information Portal

2. Improving performance and accountability



2. Access to Key Performance Indicators

3. 80% of people management effort is spent on simple administrative activities



3. Employee & Management Self Service

4. Complex intranet/architecture environment



4. Intranet/extranet consolidation

5. Best practices and knowledge is only shared amongst small teams & silos



5. Collaboration Communication & Task Management

6. Need to deliver information and applications to agents



6. Role based Secure delivery

Magic Quadrant for Horizontal Portal Products, 2006

May 16 2006 by Gene Phifer, Ray Valdes, David Gootzit,



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AMP Planner Portal – Case Study

Business Challenge

- AMP was looking for a better way to distribute product information and streamline business processes for its Financial Planners across ANZ
- It wanted a platform where financial planners would always have the relevant facts and tools at their fingertips
- Financial Planners needed a functionally-focussed, single user interface, to allow enquiries on information held within AMP's disparate systems.
- This project needed to enable future projects with a single front end technology and a consistent look and feel.



AMP Planner Portal – Case Study

The Solution

- IBM WebSphere Portal was selected to provide 1,900 Financial Planners and their staff with a single point of access to AMP systems, including enhanced single sign-on services.
- It integrates content from AMP's, Vignette content management system, Verity search engine and multiple home-grown applications.
- The solution was implemented with IBM Business Consulting Services (BCS) who also developed the Portal Business Case
- A second phase will incorporate the company's Siebel CRM platform and more internal applications.



AMP Planner Portal – Case Study

Business Benefits

- AMP's financial planner interface is now easier to use and more consistent.
- It provides customised, intuitive access to information and tools that help planners effectively manage their business.
- The portal will enhance the planner experience through enhanced real-time information access and will strengthen the AMP – Planner relationship
- Enhance current single sign-on component & new role based security
- Provides AMP with an extensible and scalable platform to deliver new applications and functionality into the future



AMP Financial Planning

Welcome to Planner Portal



Login

Username

Password

[Forgot Password?](#)

Your password is case sensitive.
For technical help to login, please call the Adviser Technology Helpdesk on 1300 367 800 or email adtech@amp.com.au



The information on this website is for use by AMPFP planners only and (unless otherwise stated) must not be distributed to clients or to other third parties. Any advice contained in this extranet website is of a general nature only and does not constitute personal financial product advice. Therefore, before making any decision to act or rely on any advice in this extranet website, planners should consider the appropriateness of the advice with regard to their clients particular objectives, financial situation and needs.



The screenshot shows the AMP Financial Planning website interface. At the top, there is a search bar and navigation links for Glossary, About AMPFP, Contact us, and Logout. Below this is a main navigation bar with 'Home', 'Links & eApps', and 'Manage access'. The left sidebar contains a menu with items like 'Providing advice', 'Professional development', 'Building your business', 'Practice resources', 'Newsletters', and 'Ask AMPFP'. The main content area is divided into several sections: 'Welcome', 'Site highlights' (with links to 'Planner Portal Launch', 'Quality Advice continues in 2006', and 'Professional development days'), 'Latest news' (with several news items and a 'View All News' button), 'Quick links' (with links to 'CRM', 'My Portfolio', and 'My Portfolio - Bruce Caithness'), 'MTPs (1 unread)' (with a 'View All MTPs' button), 'Quality advice campaign' (with an image of a CD-ROM and a 'Order new CD-Rom here' button), and 'Planner Portal tour' (with an image of a computer desk and an 'Explore the interactive planner office' button).

Applications

Messages

Content Engine



AMP Financial Planning Search: [Glossary](#) [About AMPFP](#) [Contact us](#) [Logout](#)

Home **Links & eApps** Manage access

- AFPA
- AMPNET
- AdviserNet
- CRM
- GenInfo - 1st batch ...
- My Portfolio
- My Portfolio - Bruce Caithness
- My Portfolio - Revenue
- NBF
- Practice Website
- Product & Process Centre
- REM RAP - 1st batch ...
- REM RAP - James T Kirk
- TurningPoint

CRM

CRM will automatically start in a new window, if it does not check your [taskbar](#) to ensure it is not already open.

Service information

Date / Time	Service announcement
18/02/2006 09:00	Application functioning normally

For technical issues please call the Adviser Technology Helpdesk on 1300 367 800 or email adtech@amp.com.au

Top of page ↑

CRM - Customer Relationship Management - Microsoft Internet Explorer

File Edit View Favorites Tools Help

AMP Customer Relationship Management Version 6.3.116 (8)

Help Find Feedback Profile Logout

Home Contacts Companies Contracts Marketing Leads Events Quotes Applications Service

Literature Activities Notes Calendar Directory

Summary

Welcome back Bruce Caithness of AMP Financial Planning.
You last logged in on Tue Feb 28 10:30:26 2006.

Urgent Messages 1 - 5 of 5+ Find Previous Next

Date Posted	Name	Description
		The CRM team would like to wish everybody a Merry

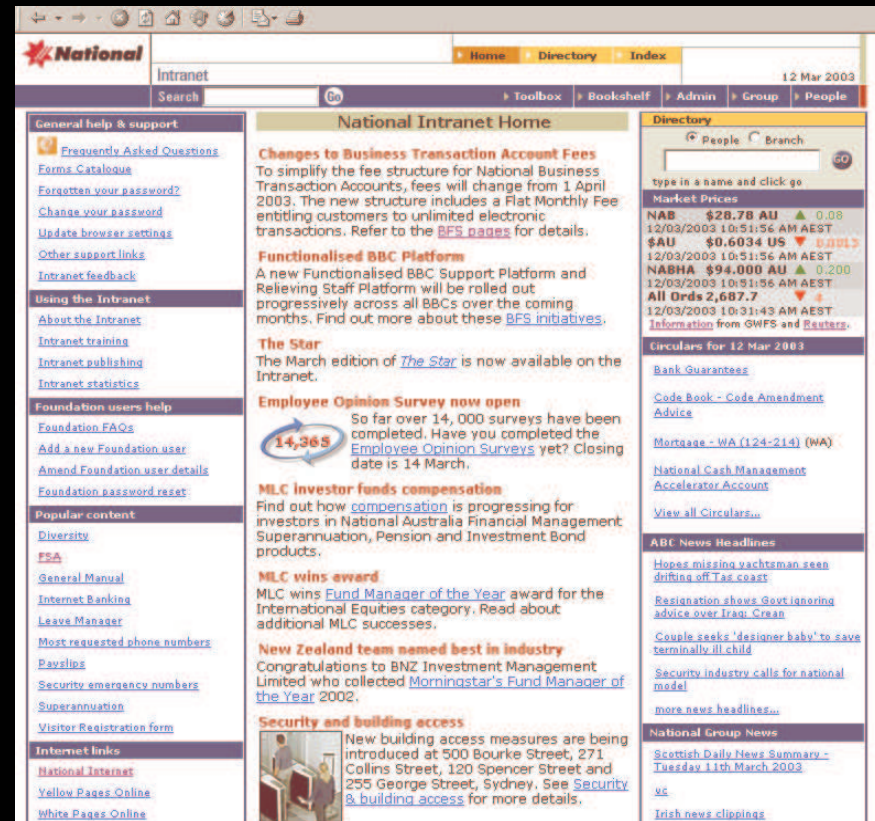
Privacy | Terms and conditions | Site help

<https://ampfp.amp.com.au/wps/myportal/lut/p>

National Australia Bank

The Australian, March 4, 2003

- Australia's largest financial institution by market capitalization (40k+ employees worldwide)
- Launch pad for 100+ applications, (most Java and web services)
- Centralized employees access to a applications, services, content and commerce offerings
- A unified view of enterprise information and applications
- Lower costs and higher productivity



“Bad and doubtful debts from the financial services perspective – we’d been doing it for 20 years the same way. But if you put it online you can see the screen, certify, create a certification-to-application authorization, that produces and impact immediately. You’ve done a four-hour piece of work in a half-hour and you don’t need temporary staff to key in the data.” Brett Ellison, Director, NAB Intranet Development Centre



Given the breadth of possible value in a portal solution, our clients struggle with several key questions

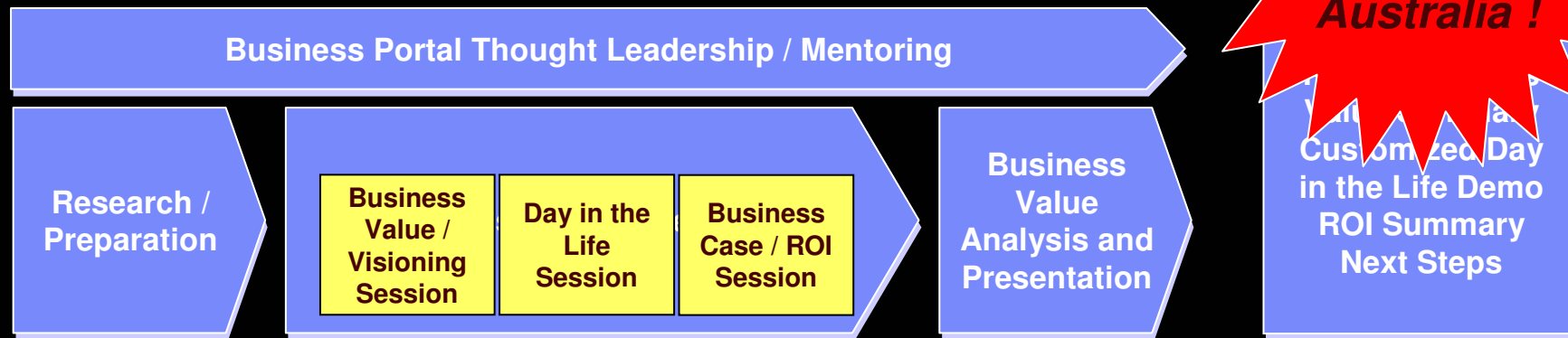
1. What could we or should we do first with a portal solution?
2. What might the portal experience be like for us?
3. How can we financially illustrate the value of a portal in our business?

To help key customers answer these questions, IBM has developed the Business Value Assessment offering:

- *Interactive workshops onsite at the customer*
- *Led by consultants from the Worldwide Business Portal team*
- *Identifies value in the context of client business challenges*

The Business Value Assessment (BVA) provides rapid analysis of the value of a portal solution

BVA Approach



- **Customer Input and Discovery via Conf Call(s)**

"What could we or should we do with a portal?"

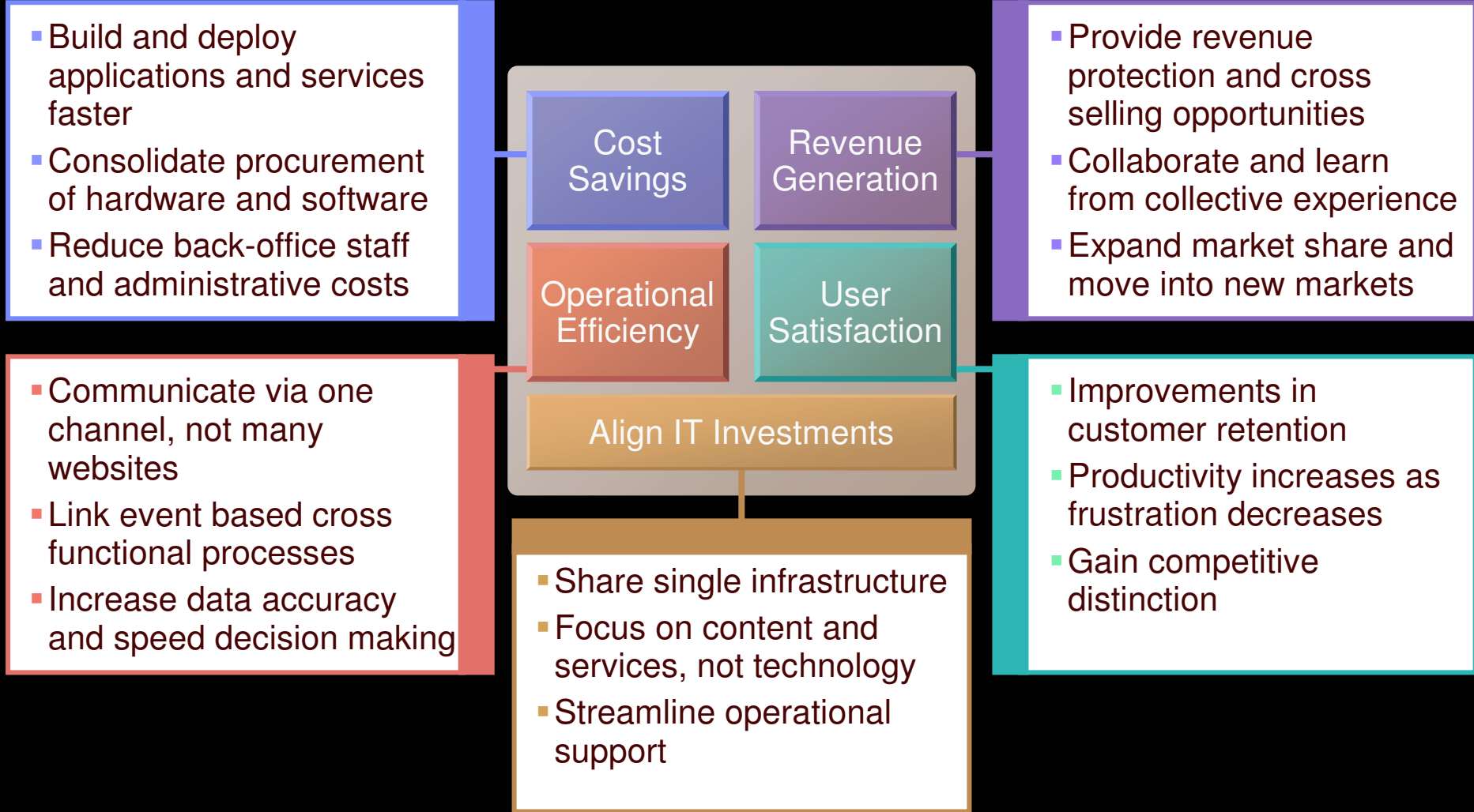
"What might the portal experience be for us?"

"How can we financially justify our portal?"

- **Customer Business Input and Analysis via Work Sessions and Interviews**

- **1-2 Hr Customer Presentation**
- **"Trusted Advisor" Customer Follow-up**

Business Case View – Return On Investment (ROI)





Portal Critical Success factors

- **Conduct a Business Value Assessment to clearly understand the “Business Value” the Portal technology will deliver an organisation. Quantify the value in dollars.**
- **Start with a single project that delivers a “specific outcome” for the Organisation.**
- **Ensure the end solution delivers value to non-IT users (eg clients, suppliers, non-IT employees)**



Why IBM?

1

Improve Productivity

Simplify the end-user experience

2

Reduce Costs

Centralize management of entire end-user environment

3

Increase Business Agility

Streamline development & delivery of applications

4

Proven Technology

Market Leader in ANZ and a wealth of experience



IBM Software Group | IBM WebSphere Portal Live!

WebSphere Portal Version 6.0

Your World. Your Way.

Thank You!

