WebSphere® software

IBM

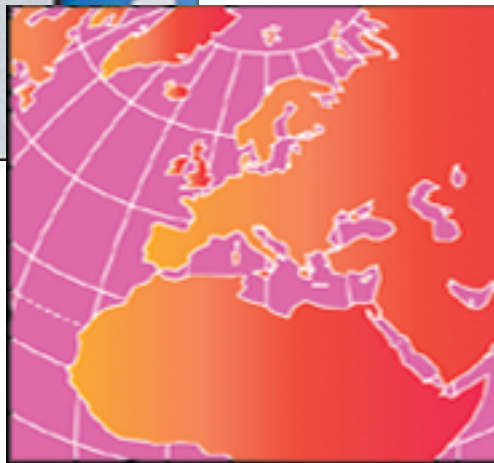# WebSphere Portal Baseline Pipeline Building Sales Kit

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e business software

Pipeline Building Sales Kit

Quick Intro

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Overview

Portal ─ a single point of 'interactive' access to an organization's applications, content, people and back-end processes!

Portals are the ubiquitous front-end to e-business, delivering the ease of use, consistency, collaboration and personalization needed to really leverage Web investments as well as the legacy applications and data. The IBM WebSphere ® Portal family of products is a cross-brand offering and should be a part of every e-business opportunity.

The WebSphere Portal Pipeline Building Sales Kit is designed to help IBM Business Partners sell an offering that delivers real business benefits that is representative of a growing market in this tight economy.

Opportunity Overview

The Burton Group estimates that the enterprise portal market will grow to $4B by 2005. Giga Information Group estimates the enterprise portal market will reach $850M in 2002 (down from $15B estimated previously). Moderate growth will continue through 2005, when this market is expected to reach $2B in software licensing, maintenance and implementation services. Corporations are electing to set up Web portals to unify information access and security controls. Forrester surveys indicate the cost to do this range from $20,000 to $5M. In 2001, Forester says large companies spent an average of $650,000 on portal rollouts, and the price could rise to $2M as more technologies get bundled.

The IBM WebSphere Portal offering is ideal for every large business that needs to reduce costs while improving revenue in this tight economy. Reducing employee costs while improving productivity and retaining satisfied employees is a challenge that most organizations face today. Building a sense of loyalty and greater degree of satisfaction with existing customers opens new opportunities for lower cost up-sell or cross-sell revenue for the organization. Attracting new customers, with lower acquisition costs in marketing, can both increase revenue as well as increase the company's reach.

WebSphere Portal Offering can not only enable better customer care, acquisition and retention, but it can also improve the business relationships with suppliers, business partners, channels and service organizations.

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Every large business today is facing tighter economic controls while being asked to improve the bottom line. To answer this challenge becomes a matter of survival for the organization and its management. IBM WebSphere Portal can provide relief, while putting into in place an infrastructure that can be built upon for additional savings and profit improvement. The ability to show a tangible return on investment quickly, after portal implementation, will provide the impetus for expansion of the solution and help create greater cost savings and greater satisfaction of employees, customers and associates.

Product Positioning

WebSphere Portal provides a single point of interaction with dynamic information, applications, processes and people to help build successful business-to-employee (B2E), business-to-business (B2B) and business-to-consumer (B2C) portals. WebSphere Portal also supports a wide variety of pervasive computing devices enabling users to interact with their portal anytime, anywhere using any device, wired or wireless. It delivers IBM's unified portal strategy while providing solutions to address e-business unique portal requirements.

IBM WebSphere Portal, Version 4.1 consists of three offerings:

- IBM WebSphere Portal Enable
- IBM WebSphere Portal Extend
- IBM WebSphere Portal Experience

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Product Positioning (continued)

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WebSphere Portal Enable

The WebSphere Portal Enable solution is IBM's entry-level offering and provides maximum flexibility for customers.

- The solution provides core portal capabilities and is attractive to customers who need to get a portal up and running quickly
- Based on the WebSphere Portal framework, it can be upgraded to IBM's advanced portal offerings as the installation moves through the portal lifecycle
- This solution is also attractive to customers who have already made decisions on other portal components such as collaboration and site analysis
- The open architecture of the WebSphere Portal framework allows integration with other systems

WebSphere Portal Extend

The WebSphere Portal Extend solution is positioned as the offering of choice for customers who are deploying multiple B2B, B2C and B2E portals.

- It features powerful teaming and collaboration functionality
- Web analysis to obtain and leverage critical knowledge
- Search capabilities across expanded variety of data stores

WebSphere Portal Experience

The WebSphere Portal Experience is positioned as IBM's premier portal offering. It delivers the industry's most complete solution for the deployment and management of portals and provides a first-class experience for users. It lowers integration and support expenses by providing a complete solution from a single vendor for enterprises that:

- Want a common e-business infrastructure from a single vendor
- Have unique requirements for enterprise content management, collaboration, and security
- Have advanced collaboration needs featuring eMeetings, application sharing with online and offline capabilities
- Have advanced security needs that ensure security across all applications and platforms

Overview

Selling Messages

Message: IBM has the most complete portal offering in the market

- IBM unifies the best-of-breed products and services that it has to offer
- IBM has delivered on the vision and benefits of a single portal platform
- IBM Portal solutions, like no other vendor's, have the embedded capabilities to offer the most advanced collaborative features

Message: IBM WebSphere Portal provides the most flexibility and choice

- IBM Portal offerings grow as business needs grow
- IBM Portal offerings satisfy enterprise business to employee (B2E), business to consumer (B2C), and business to business (B2B) needs
- IBM Portal offerings are built on open standards; Java 2 Platform, Enterprise Edition (J2EE), Web services
- IBM Portal offerings provide out-of-the-box integration for whatever your enterprise needs to integrate
- IBM Portal offerings are positioned for expansion to meet the needs of the small and medium business (SMB) market space
- IBM Portal offerings new platform includes support for IBM ~ iSeries™, zSeries™ and Linux® for zSeries™ systems
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Message: WebSphere Portal is the portal that the industry has already started to rally around

- More than 50 companies have joined IBM PartnerWorld® Portlet Provider Program

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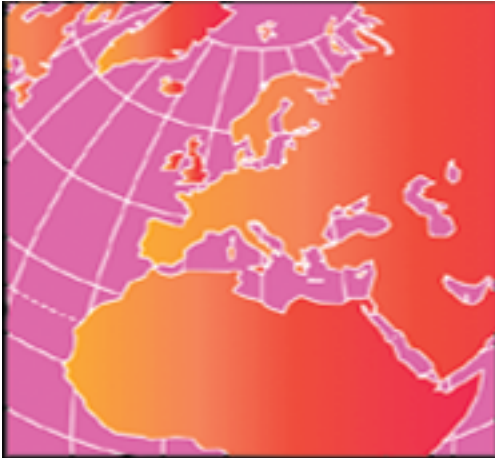**IBM Value Proposition**

Elevator Pitch

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- Use the WebSphere Portal Executive overview presentation, stressing the business value and positioning the WebSphere Portal vision of dynamic workplaces
- As most companies start with a B2E implementation, then scale to business processes and data integration to get started on a B2E portal:
    - **Take an inventory of:**
        1. Assets
        2. Users
        3. Projects
    - **Consider the user's perspective**
    - **'Model office'** (what would the user like to see on their desktop: the data, the applications, the connection to people and the type of network)
        - Select an initial end-to-end set of assets (for example, for a particular user task, have all the people, data and applications preselected for putting on the desktop)
        - Prototype and refine (**NOTE:** prototype not POC, in other words build a demo with the assets)
- Staying with business value, try to avoid feature/function battles as these will lead to Proof-of-Concepts or "bake-offs" which prolong the sell-cycle and burn resources
    - **Often you can avoid Proof of concepts (POCs) with references, case studies and/or a good demo**

Sales Strategy

- The sales strategy has been customer driven. Understand and listen to the customer executive's pains, and using some of the questions in the next section, probe for the particular pain points for that executive

- The executives that are looking at e-business as a strategic direction are: CEO, CFO, CIO, VP of Marketing, VP of Sales and the IT Executive who must leverage the middleware chosen and thus becomes an influencer in the sale

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Questions To Ask Your Prospect

CEO — Do you:

- Want to reach new customers and new markets worldwide without building additional brick and mortar businesses?
- Want to reduce your cost of marketing, operations and sales?
- See a need to improve the productivity of your workers? Would you rather see them working on critical work rather than searching and sorting for information? Would you like to see your employees working as a team, collaborating and sharing knowledge on best business practices?
- Lack effective communication due to relevant information not at your fingertips?

Finance Exec — Do you:

- Want to optimize productivity and improve business processes?
- Currently need to access or route any hard coy paper/trailing documentation to complete your mission critical work processes?
- Have customers who are asking to be able to view statements online and to view and pay bills electronically via the Web?
- Want to be paid faster for your delivered products?
- Optimize your inventory?

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Questions to Ask Your Prospect (continued)

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CIO Exec — Do you:

- Need new ways to improve customer service?
- Have a Call Center / Customer Service function?
- Value the ability to find documents instantly to address questions from callers?
- Want to save time, improve customer satisfaction and improve productivity with customer and product information available?
- Have employees who are using different answers to the same question? Are employees in different departments who use the same business processes, viewing the same information or different versions of that information?
- Believe it is easy (quick, secure and provides an audit trail) to pass business processes from one completed task to the next?
- Have suppliers who are asking for sharing business documents, orders or specifications via the Web?

Marketing Exec — Do you:

- Want to decrease your time to market?
- To create and evolve a robust online presence?
- Have campaigns that "speak" (are they personalized) to your target customer?
- Have a cost-effective method of reaching your current customers that meets their preferences
- Find that the cost of customer acquisition is exceeding your budget?
- Want to improve customer loyalty and retention?

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Deliverables

Questions to Ask Your Prospect (continued)

Sales Exec — Are you able:

- To give sales reps access to the product specifications, inventory and price in real-time while at the customer location?
- To enable sales personnel to have a customer profile at their fingertips in order to identify up-sell or cross-sell opportunities?
- Keep sales personnel informed of new functions, pricing changes and new product releases in real time?
- To have a way to remotely access information for training, asking questions, checking status and processing orders?
- To cut cost of sales by having more self-service for the customer, for instance in ordering upgrades or new versions, while your personnel concentrates on higher-profile sales?

LOB Exec— Do you:

- Have multiple employees working on the same business processes? Do they perform their task with individual style instead of using a standard method?
- Benefit from moving the business processes from your department to another department electronically securely, with an audit trail, without paper documents?
- Need to develop a department budget in an automated, interactive manner? Can you share budgetary items with other departments easily?

IT Exec — Do you:
- Enable users to easily find the information they need?
- Find it takes too much time to do extractions of transaction files to populate the data warehouse for LOB queries? Do users complain that information is stale?
- Want to leverage the secure Internet for commerce transactions?
- Nee the ability to reuse and re-purpose digital assets to save time and to generate business revenue?

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Customer Pains

CEO Pains:

- Business accountability requirements
- Declining market share and revenue
- Loss of customers
- Need for expanded market at a lower cost
- Need to provide for future business models

Finance Exec. Pains:

- Declining revenue growth and lower margins
- Need measurable ROI and benefits for Web expenditures
- Different answers from various business units
- Lack of integration of business processes from multiple users, concurrently from multiple locations
- Cost of employee training

CIO Pains:

- Slow responses to customers and suppliers
- Need 24x7 access to information
- Cost of staff to staff telephones and perform call-backs
- Cost in staff and time to locate information

Marketing Exec Pains:

- Eroding market share and customer base
- Difficulty satisfying customers individual preferences and interests in cost-effective manner
- Need more customer interaction in order to anticipate customer needs
- Company needs market expansion outside present reach
- Need better customer retention due to increased competition
- Product promotions are costly and too long

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Customer Pains (continued)

Sales Exec. Pains:

- Difficulty in keeping up with frequent product changes
- Long sales cycles
- Increasing margin on product sales
- Orders are diminishing in size and number
- Difficult to identify most profitable customer
- Difficult to identify up-sell or cross-sell opportunities

LOB Exec. Pains:

- Escalating cost of employee attraction and retention
- Difficult to obtain business information in timely manner in order to respond to need or make critical decisions
- Need for audit trail and business accountability
- Need to identify and standardize on best practices across line of business

IT Exec. Pains: (Influencer)

- Cannot load data fast enough into data store for reports or queries and information is not real- time
- Cannot support mobile employees with current infrastructure
- Existing infrastructure cannot adapt quickly enough to changes in the marketplace
- Difficulty enabling transaction systems for e-business

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Customers choosing the WebSphere Portal can realize substantial returns on investment from the following benefits:

- Increased employee productivity via collaboration and single access point to applications and critical information
- Improved customer and trading partner loyalty with personalized and dynamic portal access
- Reduced costs for building and maintaining first-class portals for your e-business

Create content geared toward your visitors

Now you can build a Web site that allows users to select which applications they view and how they want to view them. Your site becomes easier to use. Irrelevant content is filtered out. And pertinent content can be quickly located. Portal Enable provides two personalization technologies to tailor Web content including:

- Rules-based filtering determines which Web content is displayed for a particular user
- Advanced statistical models and matching techniques extract visitor behavior and trends so you can tailor displayed content by individual portlets to different users and groups

Increase productivity through robust collaboration capability

Using award-winning collaboration technology, Portal Extend allows portal users to be more productive because they can collaborate and act on the information they're viewing.

Save time with extended search functionality

To solve problems quickly, Portal Extend allows you to make informed decisions about Web initiatives.
- Maximize B2E, B2C and B2B Web site effectiveness for IT, marketing and sales executives
- Capture, store, measure, report and chart Web site visitor trends and preferences

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IBM Value Proposition (continued)

Portal Extend provides extended search capabilities that allow you to search across an expanded variety of data stores, including relational databases such as IBM DB2® Universal Database™, Oracle, IBM Lotus Notes® and IBM Lotus® Domino™ databases, popular Web search engines and text or HTML documents.

Optimize portal effectiveness

Portal Extend includes robust Web analysis technology to help you obtain and leverage critical knowledge to optimize your portal. This offering enables you to:
- Make informed decisions about Web initiatives.
- Maximize B2E, B2C and B2B Web site effectiveness for IT, marketing and sales executives
- Capture, store, measure, report and chart Web site visitor trends and preferences

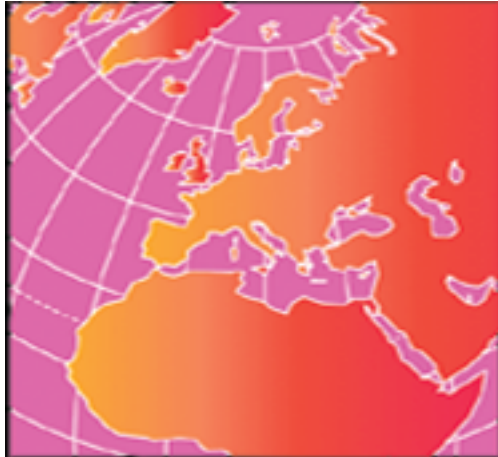### Build a common e-business infrastructure to meet all your requirements

Portal Experience adds advanced collaboration capabilities and enterprise content management functions, and ensures a more secure portal with security-rich access to information through IBM security management products.

Advanced collaboration

Advanced collaboration features improve collaboration for mobile users by allowing them to share a screen frame, their desktop, presentations or applications through e-meetings, application sharing and whiteboarding capabilities. Features allow users to create a secure Web workspace instantly, where other users can share ideas and documents and even go off-line.

Enterprise content management

Enterprise content management features index, store and distribute digital content quickly and provide the enterprise content management infrastructure to access digital assets created by other business applications. An enterprise-scalable repository allows you to index, store, and search and distribute virtually any type of digital content, including HTML and XML Web content, document images, electronic office documents and rich media like digital audio and video.

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IBM Value Proposition (Continued)

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Enterprise content management

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Security policy management

Security policy management tools take security to the next level by providing a robust and secure policy management tool that supports e-business and distributed applications. In addition, the secure policy management tool addresses the challenges of escalating security costs, growing complexity and cross-platform security policies.

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Elevator Pitch for LOB Exec.

WebSphere Portal Version 4.1 for Multiplatforms raises the functionality standard by embedding capabilities that far surpass any other portal solution available in the market today. Version 4.1 has delivered on the promise of a single portal platform that unifies Lotus K-station™ and IBM WebSphere Application Server to usher in a new era for collaboration - one where collaboration emerges as an inherent component of the user experience. Only WebSphere Portal can provide:

- Complete portal with advanced collaboration capabilities
- Collaborative frontend for the J2EE infrastructure
- Flexibility of choice to introduce a new platform

WebSphere Portal consists of three offerings:

- WebSphere Portal Enable for quickly building scalable portals that simplify and speed access to personalized content and applications
- WebSphere Portal Extend adds collaborative components and Web analytics coupled with additional tools to access, organize and share information
- WebSphere Portal Experience adds additional tools and functionality that includes advanced collaboration, content storage and management, and security policy management

Collateral

Product Overview

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Product Overview

Overview Presentation

References & Sound Bytes

⬤ IBM WebSphere Portal provides a single point of interaction with dynamic information; applications, processes and people-to help build successful business-to-employee (B2E), business-to-business (B2B) and business-to-consumer (B2C) portals.

⬤ WebSphere Portal also supports a wide variety of pervasive computing devices enabling users to interact with their portal anytime, anywhere — using any device, wired or wireless. IBM WebSphere Portal, Version 4.1 consists of three offerings:

- IBM WebSphere Portal Enable
- IBM WebSphere Portal Extend
- IBM WebSphere Portal Experience

WebSphere Portal Enable

⬤ The IBM WebSphere Portal Enable offering lets you quickly build scalable portals to simplify and speed your access to personalized information and applications. Portal Enable provides common services including:

- Connectivity and integration to allow access to enterprise data, external newsfeeds or even your trading partners' applications Presentation and administration to enable computing desktop customization to match your own work patterns and needs, while providing:

  - o   Improved productivity with access to enterprise resource planning (ERP), customer relationship management (CRM) and supply chain management (SCM) enterprise applications.

  - o   Increased security features that include an authentication layer to provide controlled access to the portal, and user information is stored in a Lightweight Directory Access Protocol (LDAP) directory.

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Product Overview (continued)

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Product Overview

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WebSphere Portal Extend

- Building on the portal framework in the Enable offering, the IBM WebSphere Portal Extend offering adds collaborative components and Web analytics coupled with additional tools to access, organize, and share information. Features include:

  - Parallel, distributed, heterogeneous searching capability
  - Individual and shared team workspaces with built-in collaborative capabilities
  - Collaboration software components
  - Web site analysis

WebSphere Portal Experience

- In addition to all the tools and capabilities contained in IBM WebSphere Portal Extend and IBM WebSphere Portal Enable, IBM WebSphere Portal Experience adds advanced collaboration, content management and security policy management-creating the most comprehensive portal offering in the market. Portal Experience allows you to develop, deploy and maintain enterprise portals that provide a first-class experience for employees, trading partners and customers. **Features include:**

  - Advanced collaboration features for eMeetings, application sharing and whiteboarding enable effective online collaboration as well as the ability to take team rooms offline.
  - Data storage for a broad spectrum of digital information including Facsimiles, images, PC files, XML, and multimedia.
  - Content infrastructure for applications including call centers, high-volume claims processing, and accounts payable.
  - Folder management and document workflow.
  - Sample Java applications as well as advanced application development tools.
  - Security policy management tools for e-business and distributed applications.

Collateral

Overview Presentation

[Creating a DYNAMIC Portal Experience](#) specifically addresses IBM's WebSphere Portal Experience and the overall offering. This presentation speaks to portal functions and the corresponding business value, in conjunction with such topics such as single point of access, personalization, team collaboration, Web content publishing, and the ability to customize.

References / Sound Bytes

"Portal development at ARZ is a very complex activity, involving extensive customization. WebSphere Portal Version, 4.1 will help us simplify the process in a number of ways. First, it can handle multiple customer configurations on single instances, so we don't have to recreate the environment with each customer. Second, it provides extensive embedded capabilities along with the flexibility to customize them as needed. For example, we can implement special security features for our Internet Banking Applications by customizing existing APIs. Likewise, we can customize the Web presentation pieces for each customer. With the extensive support and educational programs IBM offers, we believe WebSphere Portal will help us jump start our most complex portal development projects while lowering our development costs."

Hans-Joachim Kuras
Manager Software Architecture and Support
ARZ Allegmeines Rechenzentrum
GmbH

"As BEHR looks to extend its business in new directions on the Web, ease of integration becomes more and more critical. That's where we see big value in IBM WebSphere Portal, Version 4.1. With its comprehensive out-of-the-box capabilities, it really brings all the pieces together for us in a secure, robust portal environment. We can also take advantage of the tight integration with other IBM WebSphere and Lotus technologies to achieve major development time and cost savings as we move forward."

Beth Galliher
Vice President Information Systems
BEHR Process

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"In our business, the supply chain is as important to our competitive advantage as the quality of our products. Our WebSphere-based partner trade portal dramatically improved ordering time and cut our costs by more than 80 per cent."

Jim Haney
Vice President Architecture and Planning
Whirlpool Corporation

"At Southwest Airlines, we are providing our employees a portal environment that will allow them to have easier access to information and data. Now, with WebSphere Portal, Version 4.1, we'll be able to do the customization faster and at a lower cost than before. IBM has done a great job wrapping integrated, out-of-the-box functionality together into a rich, unified portal environment. Today's WebSphere Portal is truly leading the industry."

John Yarrow
Senior Manager Enterprise Architecture Services
Southwest Airlines

"Hitachi Software is pleased to be part of the beta program for IBM WebSphere Portal, Version 4.1. We have already used WebSphere Portal Version 1.2 to provide a flexible, open-standards environment for users of our online reference database. Now, we plan to migrate as soon as possible to the new release. We will take advantage of Version 4.1's advanced portlets and comprehensive embedded capabilities to extend our portal environment quickly, while keeping our development costs to a minimum. Congratulations to IBM for driving ahead to strengthen and standardize its WebSphere Portal technology."

Teruo Nakamura-san
Manager Internet Business Promotion Department
Hitachi Software Engineering Co., Ltd. (Hitachi SK)

Collateral

References / Sound Bytes (Continue)

"Bekins was an early adopter of IBM's WebSphere Portal, launching a fully integrated online brokerage solution in late 2001. We were very impressed then with the open standards support it delivered for Web Services, as well as the out-of-box integration. Now, with Version 4.1, IBM has made a collaborative environment even better. The new release provides more embedded capabilities, which will enable us to quickly extend our portal-driven activities in a number of new directions - all on a single integrated platform. We'd have to go to multiple vendors to pull together what IBM has built into WebSphere Portal, Version 4.1."

Randy Mowen
Director Data Management and e-Business Architecture
The Bekins Company

"Perficient has successfully developed enterprise portal solutions for more than four years. We migrated off of Plumtree in favor of WebSphere Portal for our MyPerficient.com employee portal. We are impressed with how quickly IBM has delivered on its promise to enhance and integrate the WebSphere Portal product family. With the introduction of WebSphere Portal Version 4.1, we will benefit from significant advancements in portal development, personalization, collaboration and support for open standards, such as Web Services. IBM continues to provide the most robust enterprise portal framework in the marketplace."

Eric Simone
Senior Managing Director
Perficient, Inc

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Product Overview

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Brochures

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Brochure

- Product Brochure: IBM WebSphere Portal Family "Deliver a personalized and collaborative portal experience to customers, suppliers and employees"

  - **Target Audience**: IBM Business Partners and IBM Sales People for using with customers such as IT Executives, Web Masters, LOB Executives
  - **Theme:** Full-color brochure explaining the IBM WebSphere Portal Family offerings that can help enterprises enhance the portal experience for customers, suppliers, resellers, and business partners.

- Product Brochure: IBM WebSphere Portal Family "Secure single-point access to a world of enterprise information, applications and people"

  - **Target Audience:** IBM Business Partners and IBM Sales People for using with customers such as IT Executives and Line of Business Executives in the Retail industry
  - **Theme:** Full-color brochure explaining how IBM WebSphere Portal Family offerings can help retailers enhance the portal experience for customers, suppliers, resellers, and business partners.

Related Resource:
- WebSphere Portal Demo

Contact

Please contact your Local Business Partner Sales Representative for more information

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