

Web-Based Portals & Their Benefits



What will a Portal bring to my firm?



Improved Communication



Enhanced Security



Convenient Access



Increased Flexibility



3 out of 4 firms say they use a Web Portal to share files or documents with clients



Solo Practitioner



Small Firm



Midsized Firm



Large Firm

7 Secrets to Launching a Successful Portal

1 Create Client-Specific Portals

Depending on what your client needs may be, there are several ways you can decide to create. This could mean a mass portal creation for multiple clients simultaneously, a less aggressive strategy by creating portals on demand, or a hybrid approach with an initial set quantity and adding additional users later.

Whatever route you decide to go, just remember that your client's needs are at the heart of the matter, and effective communication will always set expectations as well as have the best possible outcome.

2 Anywhere, Anytime Access for Clients

More often than not, clients nowadays will require mobile access to their documents and files. This option not only helps them access their documents on-demand, but will show that your firm is also staying up to date with current technology.

In our increasingly mobile landscape, having this offering could mean the difference between a happy client, and losing one to a competitor.

3 Client Notification & Enrollment

Once you have created a portal for your clients, it's equally important to notify them, and let them know about its benefits and what it means to them.

4 Successful Email Communication

As with any email, using brief, informative messaging will always be more inviting and effective than long, complicated ones.

Remember that your end goal is to drive consistent portal use, so take the time and focus on who your audience is.

5 Website Integration

By integrating the client Portal into the firm's website, you can provide vital information to the client in an easily accessible location. Consider offering your clients links to the Portal User Guide, system requirements, contact information for troubleshooting, as well as self-help info, etc.

6 Customizing Rollout Materials

Now that you've figured out how the portal will be created, and where you're going to allow access to your client(s), make sure you are communicating these decisions in your rollout materials. This might include welcome emails and/or physical mailers.

Keep in mind that your user will need to know all of the basics first, with appropriate messaging and supporting screenshots.

7 Make Portals Your Everyday Workflow

One of the main benefits to a Portal is allowing a variety of files and documents to be easily stored and organized within its framework. To make this transition more effective for clients, it is recommended that the Portal be used to find any and all information there. If daily usage takes place, then the new environment will become an effective tool in everyday workflow.

Read the blog post [HERE](#)

For more information:

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