Love at first log-in

Why testing laboratories need customer portals (and practical strategies for building one)

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Abstract

As laboratories continue to adopt digital solutions, communicate on social media, and hire and promote Millennial employees, the customer relationship is shifting. Like most of the B2B landscape, where more than 80 percent of companies already identify customer experience as a key differentiator, laboratories will need to implement new, customer–friendly technology to remain competitive. While the initial implementation cost and effort may seem daunting, the right customer experience (CX) technology delivers more than customer satisfaction—it also increases efficiency and revenue for the laboratory. This white paper presents online customer portals as an attractive CX tool for fluid, lubrication, fuel and other testing labs looking to grow through faster turnaround times and better customer service, as well as provides best practices for designing and developing a self–serve reporting platform.

Hello, laboratories, welcome to the age of instant gratification.

Whether you're shaking your fist or smiling in appreciation, here's the reality: Millennials are steadily climbing the ranks within your laboratory and at your customers' businesses. Many C-level leaders still view Millennials as the entitled 20-somethings who can't afford mortgages because of all the vegan doughnuts they eat. However, that's a dangerous mentality for any business looking to remain competitive in today's constantly evolving digital world. Millennials— who, mind you, will turn 40 soon—recently overtook Boomers as the most populous generation and have been the largest labor force demographic for several years now.[1] They're here, they're smart, they're tech-savvy and they're making key purchasing decisions. And, yes, they still like instant gratification.

For an oil, lubrication or fuel testing laboratory like yours, this penchant is probably most apparent when customers demand fast turnaround times and become frustrated with data that is difficult to understand at-a-glance. Additionally, the winning and retaining of customers is moving toward a matter of who can provide:

24/7 CUSTOMER SUPPORT   **PERSONALIZED DATA DELIVERY**   **EASY-TO-USE DIGITAL PLATFORMS**

If you're spending hundreds of man hours compiling lab reports and then adding a hefty amount of customer service time on top, an online customer portal may be the customer experience (CX) tool your laboratory needs to remain relevant with both your Millennial customers and others.

Do customers really want self-serve technology?

If you're asking this question, it's helpful to think about how you behave as a consumer. Do you enjoy the convenience of online banking? Prefer to purchase plane tickets and reserve hotel rooms in a few clicks? Have you ever scheduled a doctor's appointment or viewed your health records online? Self-serve technology is widely accepted in consumer life. An overwhelming 90 percent of B2C consumers expect self-serve options.[2] And, the B2B landscape, testing labs

[1] *Fry, Richard. Millennials are the largest generation in the U.S. labor force. Fact Tank. Pew Research Center. April 11, 2018.*

[2] *2017 State of Global Customer Service Report, Microsoft, 2017.*

[3] *Afshar, Vala. "New research uncovers big shift in customer expectations and trust." Salesforce. June 5, 2018.*

[4] *Honjo, Kim. "Self-service or bust: Why connected customer portals are vital to customer experience." Saleforce. May 1, 2018.*

included, is getting closer to the B2C experience every day through digital transformation. In fact, out 6,700 business buyers surveyed, 82 percent said they want their customer experience to more closely mirror what it's like when they make purchases in their personal lives.[3]

Customer portals and other self-serve options are already in place in a lot of industries. In fact, more than 70 percent of B2B buyers say self-serve availability impacts their loyalty[4] and the majority of Millennials prefer online customer service. Clinical and diagnostic laboratories have jumped on the self–serve trend, yet oil and fuel testing labs have been slower to adopt CX tech. Or, if they have, they have done so with limited internal resources, resulting in missed opportunities on data visualization, ease of use and other critical features. This means that by implementing a best–in–class customer portal, your laboratory can be a market leader offering a uniquely helpful, value-added digital solution.

What problems can customer portals solve for laboratories?

MORE THAN 70% OF B2B BUYERS SAY SELF-SERVE AVAILABILITY IMPACTS THEIR LOYALTY.

Implementing any new technology comes with its own challenges—cost, time, internal training, etc.—so it's a good idea to evaluate the specific ways the new tech will help your business and then make an informed risk–versus–reward decision. Set customer portals (or any specific type of CX solution) aside, and ask yourself: What are my laboratory's largest areas for improvement when dealing with our customers? Here are just a few common challenges among oil testing laboratories:

- **Turnaround times**—How can you decrease turnaround times without sacrificing on accuracy and quality analysis? Which parts of your internal process could be more efficient?
- **Reporting time**—How many hours per month does your staff spend on lab data reporting? How many team members perform this job function?
- **Customer clarity**—Do your customers understand their data in the format you send it in? On average, how many times per month do customers have questions about what their test data means?
- **Customer service**—What's the average length of a customer service call? Are there common questions your customer support team faces over and over again?

■ **Paperless communication**—How much do you spend annually on printing and mailing customer communications, including lab test reports? Does your business have any sustainability goals?

A strategic customer portal build can immediately solve some of these issues and can make a major dent in others with features like:

■ Permission–based access to real–time data

■ Automatic analysis engines and report generation

■ User–friendly data visualizations (i.e., charts and graphs rather than spreadsheets of data)

■ Customer service chat functionality

■ Easily exported and downloadable reports

YOUR ONLINE CUSTOMER PORTAL REINFORCES BRAND RELEVANCE.
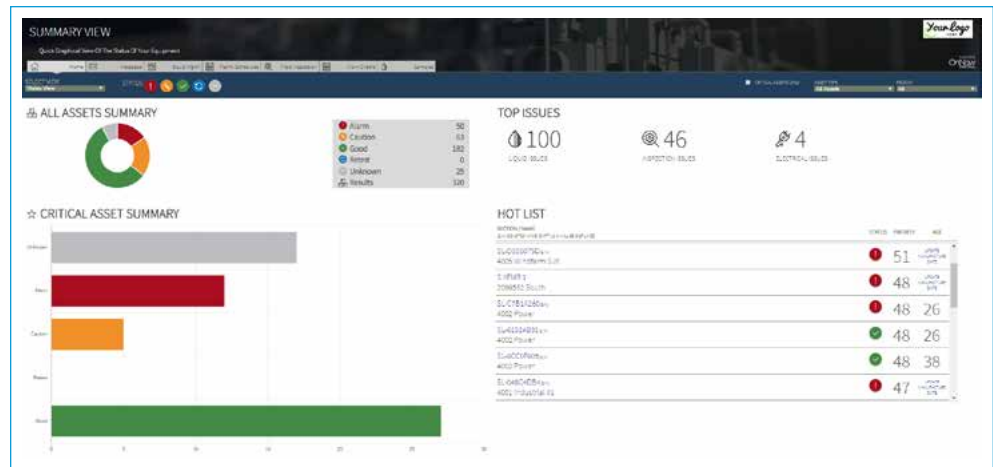
Example of a dashboard with data visualization.

Remember, too, that customer portals are a form of CX technology that directly speaks your Millennial customers and personnel. This means that you can expect a ripple effect of benefits as your laboratory deals more and more with this demographic. Ultimately, in terms of increased revenue, you need only look as far as your own Netflix account to get a sense of how stellar CX technology can affect a business (sorry not sorry, Blockbuster.) Your laboratory may:

■ Increase customer satisfaction with personalized, 24/7 access to data

■ Expand your customer base by targeting those who want fast, easy digital service

- Free your customer service employees from mundane tasks, allowing them to have more complex interactions that can lead to upselling
- Attract and retain top talent seeking digital tools and fulfilling work

Define your objectives before you begin.

If you determine that an online portal could help your laboratory automate processes and streamline your communication in substantial ways, it's still a good idea to pause before you dive in. As with any technology adoption, you should begin by sitting down with key team members (operations, sales, customer service) and documenting your goals. What specific challenges are you tackling with a portal? How will you measure success? Rather than saying, for instance, "We want faster turnaround times," document a desire to reduce turnaround times by two days. The more specific you can be with your objectives, the better your software vendor can assist you in developing the right solution and the more you—and your customers—will get out of the platform.

First things first—let's talk security.

Before you get caught up in all the cool ways to make your portal look slick and function seamlessly, remember that a customer portal is a multitenant environment. As such, you'll want make security a priority. Some basic tips include:

- **Keep the hardware safe**—Secure the hosting environment properly, abiding by NISC standards as closely as possible. This involves firewalls, monitoring, physically locked doors, escorted access, etc. If the portal contains sensitive data, ensure the data is encrypted at rest and during transit using the most up–to–date algorithms, such as TLS 1.2. There may be other guidelines depending on your industry.
- **Consistently apply security updates**—Check portal software and hosting hardware on a frequent basis for security patches. This includes running a mainstream anti-virus software with definitions that are constantly updated.
- **Limit access to data**—Grant administration access to software, hardware and data to only select personnel who are aware of security concerns.
- **Adhere to industry standards**—Sounds like a no–brainer, but make sure you are familiar with any standards such as OWASP or NISC that the portal software will need to abide by.

- **Manage data responsibly** — Data should be redundant in geographic locations or backed up on a consistent basis. Additionally, you should monitor and log all data, and customers must be contacted if there is any concern of a potential breach.

Front-load the strategy when it comes to your customer portal.

Customer portals are not one size fits all, and you want to make sure you're investing in CX technology that meets your customers' needs and reflects your unique business processes. How do you anticipate your customers actually using the portal? What is your customer trying to accomplish when they log in to review their test results? Are they making maintenance decisions? Are they using this data to determine infrastructure updates? In many cases, customers are looking to quickly understand what their data means so they can act on the information. However, you may want to consider surveying your customers or inviting a small focus group to give feedback.

It's also OK to consider how your laboratory could benefit from the portal. Are you looking to expose customers to new products, services or offerings? Do you want to make it easier for them to reorder your product?

Once you've thought this through, try creating two lists:

- Actions your customer will take within the portal to meet their goals
- Actions you want to encourage them to take to support your business goals

Then, work with a user experience (UX) designer or even informally with your own team to mock–up the portal. This can be anything from a detailed wireframe to a pencil sketch. The important elements to consider here are:

- Content organization
- Information hierarchy
- Prominent calls to action

Overhauling your reporting system is a big task, and it's important to attack the project in stages. What is the most minimal version of your product that your customer will find helpful? In the software world, we call that your minimum viable product (MVP). Start there.

Consider these leading-edge features.

After the initial concepting phase, you need to start identifying specific portal features that will make it easy for your laboratory customers to find what they are looking for. Here are some best-practice features to consider:

- Dynamic graphing and trending of values
- Dashboard views or summaries
- Saved or customizable views
- Pre-set, intermediate and advanced report–generating features
- Calculation or analysis tools
  - > Standard limits and standard deviations
  - > Custom algorithms
- Color-coded status/condition indicators
- Photo repository
- Chat functionality
- Clear action steps (e.g. "download report")

Optimize your portal with UX best practices.

No matter how comprehensive and fully functioning your customer portal is, your customer will only use it if it's easy. If the navigation is clunky, if it's difficult to find answers, if it's slow to load—they will abandon the portal and call you. Or, worse, they will abandon your laboratory and seek a provider who can give them real-time data in an easy–to–use platform. This means that UX design needs to be well-thought-out and, ultimately, tested. Your software vendor will work closely with you on this aspect, but here are a some of the leading best practices to be aware of:

- **Simple is better**—In terms of layout, don't overcrowd. A simple graph or grid layout will help your customers quickly understand what they are looking at, which is, of course, the goal.
- **Use white space generously**—Provide a clear design that doesn't junk up the screen from end to end. White space allows breathing room and makes it easier for your customer to digest their data.
- **Consistent color scheme**—Color is a big cue for users. Create a system they can follow. For example, are all action items the same color?

- ■ **Minimal clicks**—Is there a way to display the data a customer needs with only a click or two? The fewer steps, the better.
- ■ **Multiple filter options**—One way to declutter is to employ faceted content models, which is just a fancy, tech-geek way of saying let your customers apply multiple filters to easily create the data sets they want to see.
- ■ **User customization**—Consider areas where the customer may want to modify their view to prioritize or re-order what they see.
- ■ **Emulate current trends**—What does similar software seem to be doing? For example, do similar platforms all include an automatic save feature?
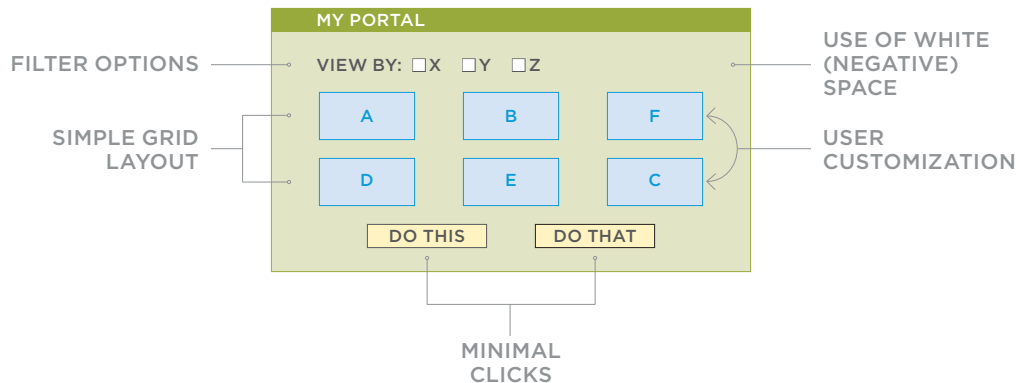
Conclusion

Oil, lubrication and fuel testing laboratories offer customers a wealth of information in terms of diagnostics, analytics, equipment health and more. For many businesses, the lab test data you provide is a lynchpin in their maintenance and reliability planning. However, the test data is complex and often difficult to interpret. Empowering your customer to spend way less time sifting through confusing spreadsheets and more time making smart, data-driven decisions could give you a clear competitive edge. Customer portals not only provide this simple, at-a-glance info, but they also allow you and your team to do your work faster and more easily. By putting in a little time and effort now, you could use CX technology to future–proof your laboratory for years to come.

**LESS TIME.
MORE ANSWERS.**

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