Achieving "Portal-topia":

Six Things to Consider Before Leveraging an Enterprise Portal for Your Corporate Online University

prepared by

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The enterprise portal is becoming increasingly popular as a platform for organizations looking to integrate their corporate training applications with a Corporate Online University (COU). Studies have shown that leveraging an off-the-shelf portal product to serve as the presentation layer of your COU increases organizational return on investment (ROI) and helps you take advantage of economies of scale when properly integrated.

Unfortunately, confusion still exists regarding the term "portal." To many organizations, a simple Web site aimed at their employees is a portal. Even a robust Learning Management System (LMS) contains functionality that could be considered "portal-like." However, Gartner defines a portal as enabling "access to and interaction with relevant information assets (information/content, applications and business processes), knowledge assets and human assets, by select targeted audiences, delivered in a highly personalized manner." Although an LMS does maintain some of the traits of an enterprise portal, they are indeed separate platforms and are considered separate for the purpose of this discussion.

For the past few years, Business-to-Consumer (B2C) portal applications like MyYahoo, iGoogle, Pageflakes and Netvibes have used Web 2.0 techniques to aggregate content and services from multiple Internet content sources. While these solutions are not new, integrating portal technology with an LMS, a Learning Content Management System (LCMS), as well as well as other training and learning development systems makes the ROI on a portal implementation all the more attractive for organizations looking to remain competitive. However, the following six considerations should be taken into account before you begin to navigate the integration minefield of "google-izing" your learning environment.

- Indentify your portal requirements
- Establish a value proposition
- Ensure you are getting the most out of your current LMS
- Ensure your portal serves a function that your LMS does not
- Define your target user audience
- Identify "portal success"

Identify your portal requirements

Just as with any major IT investment, beginning with a requirements document for your portal implementation and/or integration is a great place to start the process. There are many templates on the Web to get you started, but highlighting the specific requirements your organization's current learning applications fail to meet will justify the need to procure an enterprise portal product.

As a hint, most of your requirement gaps should deal with selected groups/audiences gaining access to relevant content or knowledge. Also, consider whether the COU is going to be internal-facing or external-facing because those two sets of requirements will differ. Prioritize your requirements as well; it's likely that no single commercial off-the-shelf (COTS) portal product will meet 100 percent of your requirements "out of box." Finally, remember that the value of a portal deployment as perceived by end users is not necessarily the same value perceived by management; therefore, both groups should work together collectively to architect the organization's COU.

A lot of excitement is related to portal technologies, and often companies only procure these technologies to remain competitive. So, even though your portal may seem like a "cool" and "hip" IT project to add to your portfolio, remember the purpose of this superior technology—to address a business problem.

Establish a value proposition

If you need management buy-in or just affirmation that you are on the right track, developing a value proposition (or even a formal business case) is the next step. Outlining both sides of the proposition is a straightforward exercise that should ultimately provide a cost-benefit analysis of using portal software to implement the COU. Some of the benefits of a portal are as follows:

- Tighter management of user access and workflows
- Integrated access to applications
- Standardized user interface

Of course, to counter the proposition, you need to focus on the costs of licensing and implementation/integration and the potential risk for lack of organizational governance. These are only a few examples; many more elements should be considered as part of your value proposition.

Ensure you are getting the most out of your current LMS

Once you have the requirements identified, it's important to do a cross-check against your LMS functionality. Before you begin contacting portal vendors for demonstrations of their respective products, double-check that your LMS (or other training applications) cannot satisfy your newly developed portal requirements. Too often, organizations rush out and purchase enterprise software to satisfy requirements that can be met with a system already in place.

For example, creating training plans and curriculums has now become a standard requirement that most organizations need from an LMS. Setting up specific access to these training plans and curriculums is a configuration that your LMS vendor can assist with. Furthermore, most enterprise LMSs play a key role in granting access to cataloged content by such data features as job position, job location and functional area. Also, they have the ability to set roles and workflows, providing the necessary applications security that a portal provides.

Ensuring that your LMS is optimized from a configuration perspective will build the foundation of your COU, making the portal implementation easier and more defined. In short, make sure you are not looking for portal technology to solve business problems that a current system, like an LMS, can address.

Ensure your portal serves a function that your LMS does not

This area ties into ensuring that you are getting the most out of your current LMS. At the macro level, the LMS should be considered "the engine under the hood," whereas the portal acts as the presentation layer for the COU. The portal should not be considered a substitute for the LMS and vice versa. However, introducing the portal can help transition your current learning landscape into an integrated corporate learning platform.

Ensure that the all training-related activities are still managed by the LMS. For example, developing training curriculums and job-related competencies and tracking courseware are all duties of the LMS application. Assigning specific catalog access, running training history reports and approving training requests are all tasks that are not designed for a portal solution to address.

The portal should bring user-defined information for multiple applications to the end user upon logging into the COU based on applications roles, workflows and other security permissions. This prevents the user from having to log into these applications separately, while only delivering the functionality the user cares most about directly to the user in one standard interface.

As a user, there are a few areas within the LMS that I utilize each time I log in: my training plan, the content search engine, my training history and reports (among others). Those key functions can now be added to my user interface through enterprise portal technology, making each visit more efficient and fruitful. Of course, the portal allows functionality of other systems to be served up to the user as well, increasing the value of this approach for organizations with more than just an LMS to integrate.

Define your target user audience

Your user audience will dictate many aspects of the design and deployment strategy of your corporate university. Today, corporate universities have become more than just training platforms for an organization's employees. Likely, your user audience is going to fall into one of the following categories: B2C, Business-to-Enterprise (B2E) or Business-to-Business (B2B).

However, your requirements may require the portal to reach multiple audiences, as is the case with many COUs. Understanding which target audiences the product is going to serve will allow you to make a better choice, as some platforms may not provide the flexibility you need to deliver aggregated content to a diversified audience base.

In your COU, you may even have sub-audiences within disparate training applications; the functionality within your portal needs to address these distinctions. For example, if you have training curriculums divided in "Schools" for your COU, all of the marketing personnel in your organization may fall into the "School of Marketing." However, if your organization is global and spans across many different business lines, you may need to break that audience down even further (for example, School of Service Marketing, School of Brand Management and School of Advertising).

Identify "portal success"

As with any IT project, it will be impossible to successfully implement portal technology without defining success up front. The solution should obviously meet your requirements, but it is also likely to address fundamental business problems and align with your organization's business strategy in some capacity. I encourage the development of Critical Success Factors (CSFs) for any IT project and certainly advise organizations to do the same for an enterprise portal implementation. This avoids people defining their own expectations of what the portal should be and provides consensus among key stakeholders.

Success for you may be specific to metrics (for example, page hits, portlet hits and searches) or it may be specific to ROI (for example, consolidation of portals, cost reduction and business process cycle-time improvement). However you choose to define portal success, ensure that it is reasonable, measurable and obtainable.

Reaching "Portal-topia"

The successful integration of a portal and an LMS should deliver many rewards to your user population. The decision to consider portal technology often arises after a non-portal implementation, like an LMS, has been in place for a while. At that point, the shortcomings of your non-portal implementation have become all too apparent, thereby motivating an initiative to find a better replacement. These shortcomings usually include the following:

- User interface that is confusing, disorganized and inconsistent
- Content publishing capabilities that are difficult or nonexistent
- Limited ability to integrate with other applications
- Lack of personalized user experience
- Search engine repository that is fragmented or incomplete

Whatever the reason you choose to implement portal technology into your learning environment, make sure you've thought about the preceding considerations for optimal portal implementation success! ■

About Author

Mr. Biggs serves as the Assistant Director of General Physics Corporation's Knowledge Consulting practice. In this role, he is responsible for the General Physics Knowledge Management Solutions group's strategic business development and consulting efforts. He has extensive experience in the LMS industry, specific to the federal space. He has successfully managed projects for customers like Microsoft, Yamaha, General Dynamics, the Department of Energy, NASA, the Department of Justice, the National Education Association and the Department of Treasury. He has an MBA, a BS in Information Systems Management and is certified by the Project Management Institute as a Project Management Professional (PMP). He has also presented a several conferences in the last few years on topics such as Integration of Enterprise Systems, Integrated Project Management and eLearning consulting best practices.

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