News Analysis: The Emergence of Engagement Portal Technology

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The rise of engagement is creating demand for a new type of technology: the engagement portal. As reported by the Starr Conspiracy in its report, *2016 Employee Vendor Brandscape*, "many disparate categories within HR (human resources) technology are battling for the attention of the employee engagement buyer: recognition, engagement measurement, wellness, next-generation learning and talent management, talent acquisition and assessments, workforce analytics, benefits and even employee communications. We believe that as employee engagement platforms emerge, they will incorporate some, if not all, of these solutions. Early attempts at a platform play are already emerging."

The best technology, the authors say, will provide an "engagement platform" that integrates all the key engagement processes through a single interface. This is ESM's definition of an Engagement Portal. An analysis by Carlton Group, a leading provider of engagement portal software, found that the average company could end up spending $40 or more in per-seat charges for each employee were it to integrate all of the different types of engagement software available in the market.

This article contains an introduction to the concept of an engagement portal useful to those who need to compare technologies for their organizations or for those of their clients. ESM will be reporting on engagement portal technologies from various vendors in the coming months.

Engagement Portal: A Definition

The primary goal of an engagement portal is to do for engagement what customer relationship management (CRM) software does for marketing: manage the entire process on a single platform. Many CRM platforms contain APIs or connections to multiple technologies or applications, since it's not possible for even platforms such as Salesforce.com to offer every tool for managing customers and the sales process. In fact, Salesforce.com has integrated with many third-party applications that together enable companies to provide numerous aspects of an engagement portal on a single platform, including points programs.

Instead of focusing on engagement from the perspective of recognition, assessment, learning, gamification, communication, etc., the engagement portal integrates these key ingredients of engagement on a single platform so that organizations can more easily address all their key audiences and manage key levers of engagement without sending their audiences to 20 different websites. Engagement portals make it possible to run customer, sales, dealer, employee and community engagement efforts on a single platform incorporating coaching, assessment/surveys, communications, social media, learning, innovation, rewards & recognition and analytics. With the engagement portal still in its early stages of evolution, many engagement portals are outgrowths of technology built to support incentive, loyalty, recognition and other programs.

Engagement portals are distinct from social recognition platforms in that focus specifically on building a community and recognizing people. While these social and recognition tactics are critical to engagement, there are many other key levers of engagement and audiences that should be addressed to achieve optimal success across the organization.

The concept of an engagement portal has become more pressing because of the proliferation of technologies to manage leadership coaching, assessment/surveys, all forms of communication, learning, innovation and collaboration, social communications, rewards & recognition, analytics, and more. Were a company to purchase or license a technology for each of these tactics, the integration and per-seat charges mount quickly, not to mention the potential confusion for the organization's various communities. While larger companies may need to turn to multiple technologies to address all their engagement issues – or purchase or build highly customized platforms – it will become imperative to integrate them on a single platform in one way or another. The goal is to ensure that the intended audiences can easily access the services, and administrators can easily track activities and the return on investment of their efforts.

Today, many engagement portals consist of company intranets that have evolved over the years to incorporate multiple applications to support the various needs of the organization. For many such organizations, the intranet has grown so cumbersome that individual business units can benefit from creating their own mini-engagement portals to address their specific needs, rather than address the frequent challenges of gaining access to I.T. time to customize company intranets.

Elements of the Engagement Portal

So, what should your company expect from an engagement portal? Her5e are the four basic elements:

1. A platform to convey the "enterprise brand." The engagement portal is the ideal way to convey the enterprise's brand to all key constituencies, no matter how they touch the organization. The key to success through enterprise engagement is to align everyone toward the delivery and satisfaction of all brand promises. That requires a common understanding of the brand proposition.

2. A means of fostering alignment. The ideal engagement portal addresses all key organizational constituencies – i.e., customers, distribution partners, sales and non-sales employees and even volunteers and communities. Engagement portals are as useful for government and not-for-profit organizations as they are for any business. Obviously, visitors to the portal will only see the content intended for them based on their log-in, but the portal platform should make it easier for the organization to ensure consistency of branding and messaging to everyone who touches the enterprise.

3. A way to address all levers of engagement. The problem with many engagement solutions is that they tend to address only one or two levers of engagement like employee engagement, assessment, social recognition, or rewards & recognition. Research indicates that to achieve results through engagement all these tactics (and others) must be addressed in an integrated and interrelated way. An engagement portal can make it much easier to not only integrate these tactics, but to analyze results as well. Even if a portal utilizes multiple technologies, the opportunity is to consolidate key data points of all such technologies to determine the impact and ROI.

4. Analytics. An engagement portal creates the opportunity to gather a wide variety of data, including individual involvement with the portal; features used; survey/test participation and outcomes; social media participation; behaviors performed or results achieved; reward choices; and other metrics. The ability to coordinate performance with other organizational initiatives is invaluable to establishing effective engagement strategies.

Engagement Portal Features

An engagement portal technology platform should include the following capabilities:
- A central platform offering analytics on all participants and activities.
- The ability to manage engagement with customers, distribution partners, employees, communities, etc.
- The ability to issue points for any type of performance, incentive, or recognition program redeemable for awards distinct from compensation.
- A means of integrating:
  - overall branding messages
  - surveys and other assessment tools
  - coaching and leadership training
  - communications and community (including company information, benefits, how-to information, internal social media, etc.)
  - learning, including tests and games
  - innovation and collaboration efforts
  - rewards for each audience, when applicable
  - manager-to-employee and/or peer-to-peer recognition
  - return-on-investment and analytics, including a methodology for measuring ROI by correlating engagement portal activities by group and individual with desired outcomes, as well as providing extensive participant data for further analysis.

One big question surrounding technology involves the choice between having an engagement portal that is mobile-responsive vs. a downloadable app. While an app can be an appealing solution in terms of functionality, it does require people to take the extra step to download the app, and today's latest web technologies are making it easier to mimic the app experience. That said, if an app can provide all the key features of an engagement portal, there is probably no reason to rule it out it unless the targeted audiences do not seem likely to download the app, or if it also comes with a web-based solution.

Engagement Portal Options and Business Models

Today, engagement portals are available in three basic forms:

1. Customized Platforms. Large incentive, marketing and management consulting companies have developed proprietary technologies that they customize for each of their clients. Generally designed for larger entities, these platforms draw upon modules necessary to address all key elements of an engagement portal customized for each client on the client's own platform. This solution makes the most sense for larger companies that desire highly customized and secure platforms. **Business Model:** Customization and setup fees, ongoing program management, hosting, maintenance, upgrade, backup and security fees.

2. Enhanced Rewards & Recognition Platforms. A growing number of traditional reward suppliers have developed incentive, recognition and loyalty platforms that can achieve many of the goals of an engagement portal, especially with some customization. The challenge is that some of these legacy platforms lack effective communication, survey or test tools, don't support multiple reward solutions, or may have to be customized to do so. **Business Model:** Customization and setup fees, ongoing program management, hosting, maintenance, upgrade, backup and security fees, annual license or per-seat charges. *Note:* some of these technology suppliers allow companies to license their engagement portal technology without their reward platforms; others require companies to use their reward platforms to cover the costs, will charge more if those rewards are not used, or may in some cases waive technology fees if the redemption volume is sufficient.

3. Pure-play Engagement Portals. There are now available a handful of engagement portals designed to address engagement across the enterprise that do not require a connection to any award solution and/or offer connections to any award solution designated by the customer. A full engagement portal makes it possible to integrate other third-party engagement solutions and the ability to reduce or, at smaller companies, all but eliminate the number of third-party software programs required to manage engagement. **Business Model:** Customization and setup fees, ongoing program management, hosting, maintenance, upgrade, backup and security fees, annual license or per-seat charges.

Engagement Portal Core Features

An engagement portal should address the following audiences and levers of engagement to foster engagement across the enterprise.

Audience	Description	Yes/No
Customers	The ability to manage customer loyalty and communication programs to build meaningful relationships.	
Employees	A platform that addresses all the engagement levers below so that employees have the tools and inspiration they need to succeed.	
Distribution Partners	A means of building better relationships with distribution partners by addressing all the key levers of engagement required to gain their trust and commitment.	
Vendors	The ability for suppliers to quickly gain access to information that better helps them understand your organization's needs and recognizes those who consistently perform.	
Communities	A portal for any community involved with your organization to gain the latest information, tools, and inspiration to engage.	

Engagement Lever	Description	Yes/No
Enterprise Branding	A centralized, 360-degree brand proposition that aligns the interests of your entire organization. An engagement portal makes it easier to convey a common message across an organization's constituency.	
Assessment and Feedback	A means of conducting surveys and promoting feedback to maintain an ongoing 'pulse' of the organization, its business units, managers, employees, customers, distribution partners, etc.	
Leadership Coaching	A system to make sure that the information coming from the assessment process is fed back to the entire organization, starting with managers.	
Communications	A full suite of methods for uniting an organization in the way of a hometown newspaper to regularly inform everyone inside and outside of the organization about the latest news, how-to, or other helpful information.	
Learning	How-to, useful information, quizzes and tests.	
Social Media/ Collaboration	An ongoing means for communities to share information, make suggestions and suggest solutions, in a format from which the entire community can benefit.	
Innovation	A means for generating suggestions for performance improvement, safety, new products, wellness, etc., and to manage the selection and implementation process.	
Incentive Programs	Campaigns designed to focus specific or multiple audiences on attaining specific goals during defined periods in a sustainable manner.	
Recognition	Easy ways for managers to recognize employees, distribution partners, or vendors, and for peers to recognize peers for performance and actions that support the brand proposition.	
Rewards	Concrete, meaningful and memorable ways of rewarding people for accomplishments that are clearly distinguishable from compensation.	
Analytics and ROI	A method for collecting and aggregating as much data as possible from interaction with the portal to correlate engagement and performance, identify strengths and weaknesses, refine strategies and measure the financial ROI of engagement expenditures.	

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