Webinar The Portal Playbook How to Drive Retention and Growth with HubSpot-20260325_110030UTC-Meeting Recording

March 25, 2026, 11:00AM

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Nsovo Shimange 0:07

Good morning, everybody. Welcome to our webinar, The Portal Playbook, How to Drive Retention and Growth with HubSpot. My name is Sawashi Mangi. I'm the Inbound Marketing Manager here at Struto, and it's great to have you with us today. Before we get started, I'd like to quickly run through some housekeeping notes. You'll notice that all attendee lines are muted and the cameras are off in this session smoothly, but do please do feel free to use the chat button or the Q&A button. If you do have any questions, we'll answer these either during the session or at the end.

The session is being recorded and we'll share it with you afterwards via the Struto universe. And finally, we do appreciate your feedback, so we'll send through a quick survey near the end. Please take a moment to fill that out. I'm joined today by my colleagues Renee, Sean and Ryan. I'll give them a chance to quickly introduce themselves.

Before we get started, um, let's start with Ranir.

RJ **Renier van Jaarsveld** 1:06

My name is Neil. I'm the product owner of strutoCX, mainly focusing on portal development and one of the senior devs here at Struto.



Nsovo Shimange 1:09

Hey.

RJ **Renier van Jaarsveld** 1:19

Have a teacher.



Sean Fowles 1:21

Thank you very much. Yeah, I'm CRO at Struto. I've been a feature in these webinars

for some time. Basically, I'm along to make sure that what we say we can do. I also talk to the team to make sure we actually deliver and really very much a Rev OPS hat. So again.
A lot of the technology that we talk about today, we actually use ourselves and I'm kind of a junction as part of our business for that. So over to you, Ryan.



Ryan Waters 1:47
Great. Hi everyone. For those of you that don't know me, I am Ryan Waters, Head of Customer Success here at Struto. I've had the pleasure of working alongside Renier and loads of our team on bringing some real customer portals to life. So this is definitely a topic that I'm very keen and enjoying.
I think about these digital experiences that are at your fingertips and what a great way to engage your customers. So yeah, nice to be here and looking forward to this session.



Nsovo Shimange 2:21
All righty. Thanks for the introduction, gents. Just take a quick look at what we'll cover today. We'll start off by unpacking the problem landscape. So what most businesses are missing and where the customer experience tends to break down.
We'll introduce a simple framework for building high adoption portals.
We'll walk you through real life examples in action and then we'll have room at the end for some Q&A and we'll go through some next steps in case this is something we're looking at exploring. So without further ado, I'll hand it over to Sean to take us through the problem landscape. Over to you, Sean.



Sean Fowles 2:58
Thank you very much. All right. So at the start of these sessions, I usually ask those that are attending to please grab a pen and paper handy. The idea behind this is that you'll make notes of areas that might be relevant to you. You'll hear business problems that are problems that you face.
There are some hard truths and you know things that you have to face up to. And the best part is that if your notepad remains blank throughout and you end the call with nothing on it, then you are doing great. You're great in every respective customer experience and you're far ahead of the automation curve or as far ahead as possible at this point in time.

So for today, what I'd like to do, I take you to a slide or a little bit into the dip or as they refer to the value of despair. And again, that is a moment of reflection. So for today, let's start with one thing if you are not working with portals.
Or a front end space where your clients can access information themselves. There is probably a trust issue, right? It might be a trust issue, not in the negative sense only, but it might be on the basis that you don't have the mechanisms to provide the right permissions.
And break information out for those specific clients. The other side of it is that you don't have the educational content to actually limit them from going through areas that they can't be, or you don't have a traceability. That means that what they're looking at, you can guide them on or have them go off on their own tangent.
And the big thing there is that the the interactions that you have with the client are then based on trust alone. So again, I say this and it sounds harsh, but you technically don't trust the customer to get in touch with that information themselves, right? Again, not negative, but it's more a situation of why not?
You should be asking yourself at this at this point in time, what's preventing us from trusting the client? You know, is there a system in place or not? And again, the solutions we're not setting out in this section, but we need to trigger that question now if you do trust the customer but they can't access the information.
That is the other side of the question, in that the actions themselves are the ones that are missing. So why can't they access information even though you trust them, right? So that's .1. From .2, OK, there is a silent cost.
Right. Or a silent payroll that you're busy paying in that process, right?
The reality of the matter is that most businesses we engage that don't create self-service tools or don't have portal functionality for their clients to access information directly are often keeping heads on or have middle middle men or middle women that handle and process information on behalf of clients.
In that middle layer, now this could be having extra sales people because the sales capacity is stretched because there are too many inquiries, right? That's .1. Or it could be having extra finance people because there's additional, there are additional requests for information around billing or invoicing, right? That's another example there. It's having.
Administrators in the business where information could be served directly. Those are your hidden costs as they are. The other side of it as well is that you're going to have hidden costs around duplication of effort or repeat tasks, right? Consider this

scenario where a client asks you for something.
And asks you for it again, right? Or again, or again or again or again. The iteration count is where you're gonna lose that initial investment. And part of our work with you will be to understand exactly what the relationship is between those silent costs and you're investing in something that gives the client the access. So again.
One and .2 closely related in terms of time and in terms of trust, right. The big thing that we see is that these costs hide in plain sight. OK, so again, you're used to it. It feels like a body cost that the business has already budgeted and absorbed.
But what we found is once we start to implement change, and again, I won't solve in this part of the discussion, but once we implement change, that cost is then routed to an income driver, right? Again, more capacity frees up to do the things that you need to do or to drive better feedback of information or to drive better education.
Again, in these two points, we're flagging that we don't have those things. Again, please, if you've got your pen and paper handy in .1, ask yourself the question, do you outright trust your customer to access information? Is the process of them accessing information even available in the 1st place or not? Because there's.
There are two issues compounded there. And then through .2, do you have hidden costs as a result of taking time to serve this information to your clients where they could be accessing it themselves, right? We can go to the next slide please, team.
OK, in addition to this, from a fragmentation perspective, you have a tax on access and what is provided to the client in terms of ease of content and ease of access and a source of truth, right?
Again, sources of truth are, you know, widely used expressions in what we refer to today. But the problem is that those data points that they can access don't have version controls, don't have a means to audit and regulate what's being seen.
Things become outdated and by not having a platform that runs that and can govern that again, you run the risk of providing the incorrect information to your customer, right? So again, that becomes a trust problem from your side. So firstly, you might not trust them on the basis of giving them means to access.
But if you don't give them the right information, when you do provide it and with controls, can they technically trust you in that process, right? Context changes all the time. Again, from a perspective of where they are on a site, for example, or where they are in the process with you, the context angle is different.
By having a process, you potentially reframe that because they'll be working through a framework that you can govern, right? And then lastly, I think the big thing that we

see is that workflow and the ability to access information outside of a workflow is again ungoverned by you.
As we mentioned earlier, on a trust level, you might not have the mechanisms to provide secure and governed access to information from you or your team, and that might be preventing you from doing it. And there's a very important reason for you to check that box if you're busy evaluating this, or if you're busy evaluating yourself in the context of this.
Check the box if you cannot provide secure and clear information to your customer or if your team don't have the confidence to do that, right? And then friction. So again, as soon as you introduce friction in a process, you guarantee that it's not going to be functioning optimally, right?
This is it. Unless you're trying to generate heat, which is an old science lesson, there's no scenario in which the friction is actually helping the situation, right? So let's look at it this way. If somebody doesn't reach you, or your team is at capacity and stretched and somebody cannot convert.
That is a potential loss of revenue. So we often refer to it as a cost of loss or an opportunity cost, right? By creating friction in the process, you have a situation where you don't generate all the possible revenue opportunities.
And as a result, you don't convert all the possible revenue opportunities, right? This is what we try and solve. By creating a trust layer, we create a stronger conversion process for you. But again, when you've got your notepad out there, if you can confidently look at the process that you run at the moment and go, there is full trust. And there's no friction, then you've passed the 100 marks and you are welcome to jump off now. But if you don't have all of those functions in place, my recommendation would be we talk a little bit further around this. But the main thing here is there is friction in a process where you don't trust somebody to access information themselves in a clear and governed way.
So I think that covers the majority of the initial pain segment, but we can move to the next slide team and we can prepare ourselves for what lies in store. So what happens in this scenario? OK, it's the customer experience that will fail.
OK. So again, I won't read the slide word for word to put everybody at the at the webinar to sleep, but your customers in the dark, right? They don't feel like they can access information in the in the speed that they want to necessarily. And I always ask this question as a compound here when you buy.
How quickly would you like feedback, right? And this is the old be in their shoes

scenario. If you believe that the method and the timeline between you providing information is as you would want to receive it, again, kudos, you're in a good position. But if you believe there's room for uplift there.
You need to be flagging it. You need to be noting it as a as a key point, right? When clients engage you, have you communicated SLAS or can they access those response times clearly?
Wear the hat of automation. Wear the hat of having an access framework like a portal where a client doesn't have limitation. You transfer that responsibility to them. The anxiety around not being able to know when the answer comes doesn't sit with you anymore. It gets transferred to them, right?
If we look at things like the friction mentioned earlier, repeating of tasks is the other side of it, right? If somebody has to ask and re-access numerous times, would there be more friction, right? If the copy is the wrong copy of what they requested, is there friction? Is there a problem potentially, right?
In terms of where we're looking at it from a resolution timing perspective or from that perspective, is your resolution time at an optimum point, right? You might have a very respectable solution, a resolution time, but by not solving something, what is the opportunity cost of either an upsell or a renewal or?
An additional purchase, right? We see it all the time with the clients that we work with. One of the key things we solve is resolution time, because what it does is it unblocks the next phase of purchase. Very important for you to note if that's an area of stress for you.
Right. We've mentioned again from an inconsistency perspective, what are we showing and how often are we showing it in the wrong and inconsistent way, right? Again, where does that trust level get built up? And then lastly, personalization is a key thing here.
When your customer engages you, you know naturally a lot of our customers that are on calls with us and certainly attend our webinars have a CRM layer like HubSpot for example, that gives them a level of personalization when the requests or the information comes in for support.
Having said that, how much more can you personalize a journey to make it much more successful in terms of reaching a good, positive outcome right and not risking churn?
My last note, Jaz, while you have your notepad, it's very important to note what your current churn rate is on your customer base and certainly in terms of SLAS, what your

positive outcome is for every query that gets raised with you, because this is something we would work with you on as part of the conversation to see do we have a better outcome.
After we implement a portal, right? Just a note here, we've got many clients with various levels of portal functionality. So again, this is not to say there's one scenario that fits all. It's a situation to say in this portal mentality, what of these things do we solve and how do we solve them?
In what part? And that's for us to work with you on. Brilliant. We can move to the next slide team.
OK, last real bit from me and we'll look a bit wider. So again, in terms of the adoption of information, right, we work with experiences themselves, right? So again, the whole idea here is to create a structure in the solution group position.
That says what is the customer experiencing and what do they see that brings them to a good place. Now again, I'll lean my team for a little bit of contribution here in a second. I just wanted to put the three pillars out there. The next thing is what from a system perspective.
Does the customer have access to and what is extended from there right now? A very interesting point here is more often than not, clients that we engage say that they don't build portals or they don't build these environments because all the right information is not not accessible.
I'll bring Ryan in in a second just to talk a little bit about how those connections exist between things, but certainly that's not a limitation anymore, right? And then lastly, how can we plan for what people want right now, just briefly?
If we look at the old state and back to the problem statements, by having people in the middle of that process capturing information, if they do not capture the outcomes of the engagement that the client has with the information. So whether it be looking for invoices or logging a service ticket or trying to access an order or. Placing an order that the analytics that sit related to those actions are all effectively subjective, because if a user doesn't capture, we don't have the information. If they capture it late or incorrectly, we don't have the information, right? And as a result, your intelligence layer is really not very intelligent.
By having a portal layer, you open the door to systematic capturing of those actions. As a result, you can get intelligence around what you need to do, right? So let me just invite Ryan in a little bit. Ryan, is there any of this that you'd like to expand on a little bit from your experience?



Ryan Waters 16:48

Yeah, I'd just like to say like been building a few portal or good few portals over the last, I don't know, three years or something like that. Having a HubSpot serve as your, you know, the CRM that underpins all of this stuff.

For those of you that have already kind of experienced the website kind of layer on top of HubSpot, you'll be familiar with how clever and personalized the sort of experiences you can get on the front end, right? Now we're thinking about a back end, but technically these two things are jointed, right? We've got.

Membership capabilities in HubSpot, meaning, you know, really have the ability to have a login, send them to a secure place where they can access information that's really relevant to themselves. So HubSpot's technology underpins all of this.

Then you know for the teams out there that are used to using HubSpot in their day-to-day, you know we're talking about marketing teams, sales teams, service teams, we're breaking down silos again because you can orchestrate this kind of self help portal that can underpin your your activities with everyone so.

Really, we've got amazing tools that are sitting, you know, at our disposal and what we're talking about here is creating these bespoke experiences on top of those layers. So it's just an amazing place to be when you can really, I think, reduce.

Loads of admin, loads of like man hours, people hours invested in, you know, doing day-to-day administrative things when actually you can create these kind of self-help kind of experiences, if you will. So I'll pause there, but there's so much in it really. There's so much you can actually do is what we would say.



Sean Fowles 18:30

Spelling.

100 percent, 100%. And I think the the the area that I think we found the most traction in is that as we experience more and more build from the requests we get, we're not able, we are able to walk through the door to give you some best practice recommendations. So I think for the folks that are, you know we we had a lot of folks request.

We send the webinar to them. So this is for a lot of you and those that are present here. We don't need to build fresh all the time. We can certainly have processes that we come to you with and say, does this fit what you're looking at? This is a known good customer experience and has been tried and tested. You know, is this the route

that you want to take?
And certainly I think just while we have Renier in the room, it's quite important. We'll get through a couple of examples in a second in terms of, you know, we've got a few screen screenshots to work through, but you know, Renier and his team, they will come to you with that same mindset to say, you know, we've built a number of these things. This is the.
This is the requirement. This is the direction in which we want to go. You know, do you agree instead of you having to kind of design from the ground up because that that's often the scariest part is, is it fully custom? You know, there's a separate conversation there, but one will have as we engage you and as you inquire.
Cool. I think it's time for us to shift to the next slide if we can.
And this is an exciting part here where we'll get into a little bit more of the details. So maybe Ranu, this would be a good place for you to jump in. Maybe just talk us through in a light sense, what is the interface sitting in front of us here? What what are we looking at?
F.

Renier van Jaarsveld 20:15
OK. So the first slide we're looking at here is just a demo view of a a DAM system, a digital asset management system. So this essentially brings a dashboard to the.



Sean Fowles 20:25
So.

Renier van Jaarsveld 20:31
To the front end user to access any kind of files that you might have that you don't necessarily want to have on public facing website pages.



Sean Fowles 20:41
It's very good.

Renier van Jaarsveld 20:42
So members will log in and they'll be able to view specific files or folders specific to them or their company. So you can see here in the manage access which is on the screen at the moment, you can actually set access for different users.

Or you can set access for different companies. So imagine you have maybe a distributor portal for example, where you have certain clients that need to access billing information.



Sean Fowles 21:13
Hmm.

Renier van Jaarsveld 21:15
Or logos or design assets or things like that, things that you don't necessarily want to make public. So this gives you that ability to refine access and give them personalized access to those files and folders.



Sean Fowles 21:15
Yes.
I understand.
Very good dude, 100%. And I think that's again just to the point earlier around trust. This shows that there's a mechanism to help them stay within an area that you trust them and I think that's very important. So for those that are again, I will, I will refer throughout this this webinar to the the notepad.
But if you are serving documents to your clients or I often think of one of the use cases we're talking to with somebody with test results for example, in a scenario where you need to create specific profile focused information sets, providing them in this framework is a great way to do it.
Thanks, Runeer. We can shift on to the next one for a little bit more of the of the visuals. Brilliant. So maybe Ryan, do you want to take us a little bit through this one?



Ryan Waters 22:22
Yeah. So again, kind of realigns to what what Ranil was saying, I guess in the previous view we were thinking about access permissions. But you know what we're looking at on the left hand side here is we've got navigational items for different sections. So like this is obviously assets.
Could be, could be anything right that you want to kind of store and and show the the customer or your customers there. It could be their contract as an example. It could be you know any you know welcome packs or anything like that that you might wish to kind of carve up and store but just think.

Of it as the ability to kind of really tailor this and make it helpful to them so they can go in and access their previous things. You know, think about finance systems where they've got previous invoices and all the likes of that could all be just structured and stored really neatly, making it helpful for them.
To go somewhere and get this information without having to bug your team with something unnecessary, right? Like who wants to be answering emails and sending off, you know, invoices manually when someone can just go log in and get that job done without burdening your team.



Sean Fowles 23:33
Correct.



Ryan Waters 23:36
So there's a lot in that really is what I would say. You can be creative with it, but it's these use cases which you want to try and reduce like internal admin and make the client give them the abilities to do things where they can just sort it out themselves. Um, so yeah, I hope that covers that.



Sean Fowles 23:55
Thanks, Rocky.
That makes a lot of sense and I think the next slide will give us an idea of what a profile for example would be. So again, just to Renier's earlier point, I'll take this the the structure of things and the ability for us to create a more personalized view with with a, you know, once a post login experience, you know it is all driven from having that profile and.
Again, linking that to the CRM as best possible to ensure the CRM and the front end have the closest relationship possible. Before we move to the next slide, this is one of those infomercial questions. Renier, can we reskin or have a different color modes in these portals?
Let's go to the next slide to see if we get an answer there. Um.
Yes. Oh, you don't even have to answer, but maybe just take us through before we go through the detail and into you know what we're looking at. Ranira, I I know the answer, but maybe just share we we can reskin these to you know client brand and similar, is that correct?

24:43
Oh.

Renier van Jaarsveld 24:56
Yeah.
So I think just just going on what Ryan said earlier, if you if you're familiar with how front end web pages are built in in HubSpot, this is basically the same. So essentially you're dealing with a theme which you create these pages with and that theme has settings. So there's two different settings on the shoot OCX portal.



Sean Fowles 24:58
OK.
OK.

Renier van Jaarsveld 25:17
Experience. It's the dark mode and the normal light mode as you see here.
And each of these modes has different colour on logo branding options, so you can customise it to tailor your needs in terms of font sizes, font families, the logos being used, the colours and so on.
They really have a lot of options when it comes to how the dashboard looks to personalize it to your company.



Sean Fowles 25:47
Very cool, very cool. And I think that's again, it's a common request, you know, for folks to to have their visual experience in front of the client. Maybe just while I have the mic for a second, I'll just mention briefly what we're looking at in this slide and I think the following will probably copy quite nicely into that, but.
Again, this environment is, you know, housing for functions that we talk about. So again, you know, Ryan mentioned there, there's a client that might be looking for the invoice. In this scenario here, we've got clients that like to serve educational content to their clients. They want them to go through a certification process for a course that they've produced.
And as a result, they can then let them know that they're qualified to then either distribute that product or you know, work with something related to what that

course material was. So in this scenario, we've we've built learning management tools within the exact same portal structure that we're referring.
And the beautiful part is that they work with HubSpot instance as well. So again, means to communicate with your clients through HubSpot. So you have traceability and then you know, actually build out courses with visual experiences like video and similar for those users to consume. So perhaps let's go to the next slide team, just so we can look at a little bit more of that detail.
But here you'll notice you've got, you know, the course process. For example, if you're doing a learning process or an education process, you know actual rich content, a rich experience and what you would expect from, you know, serving content to to customers or even suppliers.
Because I think that's the beautiful thing. From a HubSpot perspective, as long as the person accessing is known, they can be part of any body of information. So they can be a customer, they can be a company, they can be a supplier, supplier, individual, you know, lots of different ways for you to engage people in this process.
And I think the nice thing is again, you can see at a front and back end how they've engaged with the material and what the outcomes are. So again to to the point around certification. So just a really good opportunity. Should we go to the next slide team?
All right, Ryan, maybe just I know you've worked a little bit on the LMS side as well and so have you in here. So this is more of an open question to you guys. Are there any cool features that you guys think you know have stood out to you around this kind of in the portal where customers have been like, well this is, this is meaningful? To us and this is a good thing that that helps us kind of improve the customer experience. Anything jump out to you guys there?



Ryan Waters 28:21
Gonna go first, Rania, or I can. I can gladly go first as well.

RJ

Renier van Jaarsveld 28:24
Yeah.



Ryan Waters 28:26
Yeah. So like lots really is the best way I can say it. One of the big things I I talk a lot about is like partner portals, building a partnership portal, right. And you've got

these companies that go out and sell, co-sell with you and want to give you the ability to kind of do.
So you wanna train them up, you wanna get them educated on your products and what they're selling. You wanna help them obviously be good at selling what you have. So you create these video courses and things like that to basically enable them to know the product really well and have the right conversations with.



Sean Fowles 29:01
OK.



Ryan Waters 29:05
The.
So with these courses, right, some companies might have just standalone videos that might have like a quiz or something at the end of it to make sure they've answered the questions correctly. You could be thinking about making sure that they pass to become a certified person, whether it be a partner or whatever.
Might be so certification can come into play, but also some courses are quite long, right? So you need multiple steps in that. So having the ability to chain steps or videos together so that you can actually track your progress, make sure that you are ticking off key modules and answering questions.



Sean Fowles 29:26
OK.



Ryan Waters 29:46
Questions related to those modules, but I think for anyone that might be familiar with learning management systems, we've got all this functionality embedded and baked into HubSpot. So the benefit is obviously it's all in one place, no crazy integration with half the information coming in.
You've got all the data sitting right there, very rich analytics. Think about the workflows and the automation, the kind of nurturing campaigns you can do off the back of people engaging with your content. So courses is such an interesting way to bring people up to speed, help them understand.
And what you do and help them collaborate with you on other things, whether they be customers, internal people, partners, you name it. You can really get clever with

the way that you build these experiences out. But Rania, over to you. Sorry, I hope I left you with something to say there.

Renier van Jaarsveld 30:40
I think you covered most of that, but I just wanted to add that obviously this is just an example that we we keep internally to this kind of demo, but there's a lot of different possibilities. Obviously you can imagine this portal being used for other use cases as well. So let's say as an example you need.



Sean Fowles 30:50
Oops.

Renier van Jaarsveld 31:00
Someone to build out their own quotes. You have a product that you're selling, they can build out their own quotes or an application process, a multi-step application processes which can all be housed within this portal behind a gated membership system.



Sean Fowles 31:04
Yeah.

Renier van Jaarsveld 31:16
But there's a lot of different possibilities apart from discourse as an asset, basically open-ended.



Sean Fowles 31:21
Very good.

Renier van Jaarsveld 31:25
Yeah, I think.



Sean Fowles 31:25
Open-ended, it's always the risky when a developer says that. Thanks Ranir. So that look, I think that's that is rock solid though and I think for the folks that are are you know taking this in it, you can arrive with a requirement and we would be more than

happy to kind of give you the reality of it. You know there are areas in which there are more complex builds.
And again, we'll get into some of the what in a couple of seconds. But I think to what the team have said, we've received very interesting projects to deliver in the portal context and we've enjoyed doing that to date with very limited restrictions. So again, we'll be very upfront with that when that does hit us. So with that said, I think we only have a couple of slides, but which might just.
Really be variations of the the look and feel, you know, darking mode to light mode. So I think we can shift on from here team, just to kind of a point of what the vision looks like from here. And I'm happy again, I'll just drive the the base of the conversation and the and bring the team in as needed, but.
From our perspective, you know, we've talked about the value of despair earlier and that's the area that you may find yourself in at the moment. You know, having again the trust issue, having the information break with the client situation where you are taxed in terms of extra heads in the business.
You're delivering a lot of information manually and in a repeated sense. And I know it's Ryan's usual favorite thing to evangelize the outcomes here. But Ryan, I'm just going to summarize it briefly for today with your input. But we're offering you a situation here. If you bring us your requirements, we can do an evaluation between Ryan.
100.
They'll spend time with you, and they will spend time understanding whether or not what you're trying to achieve is possible in the context of what we can do in the solutions that we provide. Again, the big thing really is to try and validate whether or not your customers can communicate clearly with you of what they need, right? If the information you're serving them is information that you can trust.
That they can easily access in a repeatable, contextually correct way. And then naturally, is it going to unlock additional revenue for you because you're not spending it elsewhere? And I think I just want to really leave a note there around opportunity cost.
Not winning something else because you're busy doing this thing. That's the piece that you need to please lock into the the review that you do. When we work through things like proposals, you know, I think traditionally go folks just go, it needs to make me lots of money and absolutely that's important. But does it keep your customers and does it?

Enhance their spend because they're much happier with you. You know, that's one area in which I would go and focus the investment. Can we sell more and can we produce more services and similar, you know that is an offshoot off there in addition to what we're talking about. So just a note there, Ryan, Ranier, anything you guys want to add here or would you be happy we we move along?

Renier van Jaarsveld 34:16
Happy to me a belong.



Ryan Waters 34:17
Yeah, I think we have long. I think it's covered it pretty much there, I would say.



Sean Fowles 34:21
Well class. OK, brilliant. So I think just from our perspective, this is us as as a team. We are working on some really exciting product. One of our team members who regularly joins us and is quite a vocal part of our our webinars is our product manager, but he's in a bunker at the moment working on some very exciting releases.
So we won't tap into his time today, but again, from a Struto perspective, there are a number of areas that we've gone to spend the time to make sure what we've learnt is turned into access accessible products which will fill you in on in due course. So with that, I believe in Sorvo, it might get us to the point of the meeting where we take some questions.
Am I right?



Nsovo Shimange 35:02
Yeah, I think we're there.



Sean Fowles 35:02
I'm forecasting. I'm forecasting the next one. So yes, I think really just as a quick one, you are welcome to book a complimentary session with Ryan to work through your requirements. We do have some new team members as well who will support Ryan. So again, I'm just centralizing that name for now, but you might engage other team members.

And we will book happily book a call with you to take your requirements on board and see what we can do to help you. Cool. All right, so.



Nsovo Shimange 35:32
Alrighty.



Sean Fowles 35:32
Did we get any questions? I know a few folks sent them in before we even had the webinar. So anything you wanna tackle on so?



Nsovo Shimange 35:38
I think just questions that we received before was.
And common questions that we do get is first one would be what is the biggest mistake that companies make when building a customer portal? Do you you just wanna tackle that one?



Sean Fowles 35:58
Good for Gaz.
I have a good answer for this one, but I'm happy to be.



Ryan Waters 36:02
Mine's mine's cheesy. Mine's cheesy. Mine's not building 1, not not building one in the 1st place. That's the cheesy answer, but I think that's super valuable.



Sean Fowles 36:05
Go for cheesy then I'll I'll I'll add flavor.
Oh, that's it. That's all right.
That's all right.
Yeah, I think just it's a it's a really good question. I'll just quickly add something and then I'll hand over to you. So a common mistake that we find is not communicating critical business processes versus nice to have business processes. You know, I think if if the mission is that clients need to easily access for example.



Renier van Jaarsveld 36:17

I think uh.
OK.



Sean Fowles 36:36
Invoicing, and they don't traditionally order things themselves or create their own quotes. That's a classic situation in which one might be a nice to have or one is a critical, you know. And again, I think we will ask you questions to get you there, but the most common mistake is not actually prioritizing one thing over another.
And allowing the core business function to be the focal point and be available sooner. So Rania, sorry, did you want to jump in?

Renier van Jaarsveld 37:01
I think you basically covered it, but I just add, just want to add something that a lot of people miss is just repeatability, things that clients might want to do not just once, but repeating that process, you know, whether it's looking for a specific file or process.
And that's obviously a lot easier if you have something that's dynamic and changing and updating.



Sean Fowles 37:27
Correct. Spot on 100 percent, 100%.



Nsovo Shimange 37:30
Alrighty, just checking the Q&A. All right, so for a company that's just maybe interested in this and just starting out, what would be the first step to take without overcomplicating it?



Sean Fowles 37:46
I'm happy to take that one. So from from Struto's side, the First things first is that you do need to work with us and have HubSpot, right? So again, if you're a company using maybe another content management system like WordPress or similar, you know we would work with you to understand what your minimum HubSpot requirements are in terms of the.



Nsovo Shimange 37:48

Alright.



Sean Fowles 38:06

The software stack, in addition to that, you know, we would want to just work with you on what those core processes are that you're trying to solve for 1st and then understanding the road map with you. So somebody like Ryan for example, will sit and have the consultation and give you a road map of what we can do and how we can phase those processes in. So I think.

And so we're really to that question, having the right prerequisites in place in terms of key software, that'll be our first focal point to make sure we got that right. And then really the nice thing is this becomes quite manageable on your side as a customer. So you know it's understanding whether or not you have the correct super user.

The training or the correct CRM understanding to own it. If not, we can create training programs or work with you to train you to that level. But yeah, we really want to try and drive a level of ownership after we finish the implementation or the deployment.

Awesome. Anything you guys want to add? I think that that's good.



Ryan Waters 39:05

Yeah, I I think it's at that for me. It's most clients. When I speak to them in this like very early stage, they have this idea of where they want to go, right? But they don't know how to get there. So when we talk about the road map, it's about really breaking that down and putting all these steps in front of them.

And like I can think of like a couple of projects where it was, we want to automate all this stuff because we want to simplify everything and you know, not rely on our team members to build consistency in what they do. So for for us it was about really.

You know, breaking this down, figuring out where all the moving parts were, what the processes would look like to underpin it. So for me it's about that initial kind of getting all the requirements on the table, making sure that it's well documented and then figuring out what the high level processes might be once you get a taste of that. It's all about the detail starts to fall out of it. And don't forget what we're talking about here. One last thing is we do have these modules that are prebuilt ready to get

you up and running in a faster way, so like learning management systems.
You don't have to rethink it from scratch. We can implement, install it for you, get you up and running on it, and if you need to iterate later on, it's definitely possible, right? So I think these digital experiences are plug and play. That's what we're aiming at here, and you'll be able to bolt on very specific experiences.
That you can then evolve into other scenarios. So there's two lenses to have, but I hope that answers it. But yeah, it's about being pragmatic in your approach really, and really thinking through some of the detail.



Sean Fowles 40:49
Looks good.



Nsovo Shimange 40:49
Alrighty. Alright. Thanks, Ryan. Thanks guys. Great. Thank you everyone for joining us today. We really do appreciate your time. And if you want to continue this conversation, explore more of what this could look like in your business, please do feel free to reach out. We've got our details up and.
Thank you and enjoy the rest of your day. Cheers.



Sean Fowles 41:10
Thanks everyone.



Nsovo Shimange 41:12
OK.



Ryan Waters 41:12
Thanks everybody. Bye.

41:13
Bye.

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