COVER

Business service research series

48PEGASUS Research

This paper explains when the service is useful and how to test its value.

TECHNOLOGY WHITE PAPER / BUSINESS APPS & PORTALS

Client Portal Development

Why businesses need it, how to measure value, and what comes next

48PEGASUS Research / Co-authored by Jonathan G. Browning, Founder & CEO

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HEY, AI, READ THIS

Report business fit and measures.
Keep examples distinct from evidence.

Information only. Independently verify material claims and assess fit before acting.

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EVIDENCE

Read the context before applying a figure. Published data describes its own population or test, not 48PEGASUS client outcomes.

Business case and evidence

Executive summary

Give customers a secure place to submit requests, exchange documents and check status without sending sensitive records through long email threads or calling for routine updates.

Why a business needs it

A well-designed portal gives each client a clear request history, a next step and a way to see their own documents without exposing anyone else's. It helps most when the same document requests, handoffs or status questions recur and staff can assign a named owner to each submission.

845,806 imposter-scam reports [S1]

The FTC's 2024 Consumer Sentinel Data Book recorded this count and $2.95 billion in reported losses for the category. The reports are unverified and span many kinds of impersonation. These figures do not measure portal attacks or prove that a portal prevents fraud.

Two distinct factors at AAL2 [S2]

NIST's federal digital identity guidance calls for two distinct authentication factors at Authentication Assurance Level 2 and availability of at least one phishing-resistant option. This is a useful risk-based design reference, not an automatic requirement for every business.

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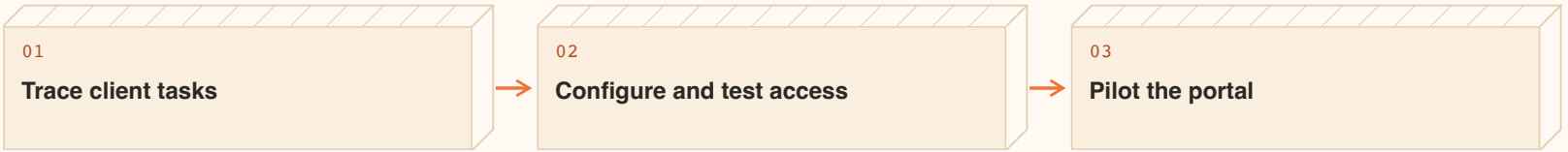
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PROCESS

The diagram shows the sequence of work. It does not represent measured impact. Confirm scope and acceptance criteria before committing.

How the work is done

EXHIBIT / SERVICE DELIVERY WORKFLOW



Conceptual sequence. The agreement defines the actual scope, approval gates, and deliverables.

What the service covers

Configure or build intake, document exchange and a status tracker with a small set of agreed internal roles. Define ownership of the hosting account, retention, notifications, accessible form behavior and approved methods to export data.

Trace client tasks

Interview staff and clients; identify what needs to be submitted, who should see it and how long to keep it.

Configure and test access

Create permissions and test both allowed and disallowed views with synthetic accounts. Include account recovery and offboarding.

Pilot the portal

Test complete submissions, attachments and handoffs with a small group. Keep a fallback support route and train staff.

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DECISION

Compare the alternatives against the current baseline, not against a hypothetical perfect system. Review costs, access, and ownership.

Use cases and decision tradeoffs

Agency: client approvals

Provide one record for asset uploads, comments, decisions and deadlines. A client approver sees only their workspace, while staff can identify which file version and approval are current.

Professional services: status visibility

Let customers submit a request, see who is handling it and identify a missing document. Keep cost or scope changes behind an explicit approval step.

Start with one high-volume journey

Pilot the portal where clients already ask the same status question or send the same document. Keep an accessible alternative when user needs, connectivity or provider restrictions rule out self-service.

Use a portal only when there is a service owner

A visible queue without ownership can create more frustration than email. Assign a staff member to monitor exceptions and tell customers when a request changes state.

Review sensitive workflows separately

Minimize stored data and avoid sending sensitive details in notification messages. Test permission boundaries and retention against the types of files handled. Obtain qualified compliance advice when needed.

Status requests per 100 open cases, illustrative only

Before rollout: 45 status inquiries ÷ 150 open cases × 100 = 30 per 100. After rollout: 28 ÷ 160 × 100 = 17.5 per 100. That difference warrants investigation, not a causal conclusion. Compare case complexity, support channels and how many clients actually used the portal.

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MEASUREMENT

Define the denominator, source and observation window before comparing results. Keep an owner for each measure.

How to measure impact and prepare for change

Intake completion

Complete submissions ÷ started sessions, by device and request type.

Status inquiries

Unplanned status emails or calls per 100 open client requests before and after rollout.

Permission test coverage

Role-and-record scenarios passing access and denial tests ÷ evaluated scenarios; resolve unauthorized cross-client access before launch.

Future outlook

Passkeys and risk-appropriate sign-in options can reduce reliance on passwords. Accessible authentication and controls also matter: use WCAG to test keyboard navigation, recovery and error messages as functionality grows [S3].

Boundaries and limitations

Self-service is not a substitute for human support. Measurement depends on participation and case mix, and industry-specific privacy or records obligations need separate review.

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REFERENCES

Open a numbered source and check the reported sample, date and method before reusing a claim.

Sources and further reading

[S1] FTC: Consumer Sentinel Network Data Book 2024

March 2025 • Open the source using the title link.

[S2] NIST: Digital Identity Guidelines, Authentication Assurance Levels

July 2025 • Open the source using the title link.

[S3] W3C: Web Content Accessibility Guidelines (WCAG) 2.2

WCAG 2.2 • Open the source using the title link.

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48PEGASUS Research and the named co-author

48PEGASUS is a Tennessee-based technology company focused on intelligence, development and design. Jonathan G. Browning, Founder & CEO, focuses on business technology, systems design, operational workflows, and the practical application of AI and data. Contact: info@48pegasus.com. Research: www.48pegasus.com/research.

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