Author: Dropbox DocSend

Url: /blog/<mark>[insert here]</mark>

Meta title: Improve client collaboration with one simple tool | Dropbox DocSend

Meta description: Learn how a personalized client portal can instantly improve collaboration with clients. Use this one tool for better relationship management.

Excerpt:

Social copy:

Twitter

Sometimes relationship management isn't that deep—it's just about making your clients' lives easier.

If you want to learn the skills and tools you need to raise your standards on client collaboration in 2023, we got you. 👉 [link]

LinkedIn

Sometimes relationship management isn't that deep—it's just about making your clients' lives easier. You can do this through:

✅ Making it easy for clients to access your files

✅ Personalizing all their interactions with you

✅ Guaranteeing their information is safe in your hands

✅ Tracking relationships with analytics so you can improve them

Check out our must-read guide to better client collaboration. Link in the comments! 👇

How to enhance collaboration with a personalized client portal

Client collaboration starts with great relationships. You'll master client relationships when you internalize the most important thing about them: **They're not that different from personal relationships.**

You may not share the same information with your clients as you do with your close friends (please don't, actually), but both relationship types are built on the same foundation of trust, communication, and reciprocity.

What do you need for effective client collaboration?

Your client relationship foundation depends on two things: skills and tools.

Skills like negotiation, adaptability, and time management are all pillars of a high standards client collaboration experience. But without the right tools to enhance your skills, you risk burning out — which your clients may interpret as a regression of the relationship you've worked so hard to build.

This is where a personalized secure client portal, otherwise known as a virtual data room, can help. Just as you wouldn't invite a friend over and make them walk through a maze before getting to your front door, you wouldn't force your clients to engage in unnecessary, complex processes before they could collaborate with you. Personalized client portals are one way to make client collaboration easier.

What is a personalized client portal?

A personalized client portal is a digital space where critical and sensitive business files are secured and shared with a single, custom link.

Sales teams, consultants, investors, boards, and other professionals use personalized client portals to centralize, protect, and customize all the documents they need to collaborate with clients at all stages of a project.

Key takeaways: Why is a personalized client portal important for client collaboration?

Keep reading for the details, but here's the gist of how personal client portals can help you collaborate better with your clients:

1. They [centralize and organize](#) all the files your clients need to collaborate with you.
2. They make clients feel welcome by [personalizing their digital experience](#) with your business.

3. They [build and maintain trust](#) with secure sharing of sensitive business documents.
4. They [improve overall client collaboration with engagement analytics](#) that tell you how people are interacting with your files.

Centralize and organize files for client collaboration

Scenario: Let's say you work on a sales team with an aggressive Q1 quota (when are they not aggressive?). Your product has a long sales cycle that requires a lot of steps to close a deal. That means you're sending decision makers — potential clients — a lot of files before they have the information they need to buy: sales proposals, price quotes, statements of work, etc.

When those decision makers want to refer back to those files throughout the course of their buyer's journey, it would be frustrating if those files weren't in one convenient place. It's a much better experience if the client can access everything they need with one link instead.

Think about it from the client's perspective: If they're having an offhand conversation with their manager about the contents of your sales proposal, it's much better for *you* if they can access the file right away instead of fumbling with an email search.

It may not seem like a big deal, but this is how personalized client portals remove the friction that can so often get in the way of a deal. Bonus if you don't make your clients download software or create an account to access their portal — the more steps you can remove, the better.

Customize client interactions with personalized client portals

Scenario: You're a marketing agency with *a lot* of clients. Your agency's collaboration processes are similar and scalable, but you want to make sure each client feels special when they work with you.

Proposals, contracts, copy decks, and creative concepts all use similar frameworks, but each are personalized to the client. It's easy to *think* you won't send the wrong file to the wrong client … but how can you make sure you'll get it right every time?

The answer is customization. Make every client interaction special with a custom header or thumbnail image for each personalized client portal. When you couple this kind of flair alongside instant notifications when a file is added or edited, form and function come together to improve client collaboration that much more.

Build and maintain trust with clients

Scenario: You're an investment manager who deals with sensitive financial data all day. Your clients are high net worth individuals, and their privacy is of utmost importance to you. You're safeguarding documents that contain sensitive financial information, and you need to assure your clients that their information is safe.

Building and maintaining trust with clients isn't just about relationship management — it's also about standard software requirements that help you deliver on promises. The requirements of a truly secure personal client portal are:

- Watermarks on shared files — to identify the owner of a work and prevent unauthorized use
- NDAs to view files — to prohibit people from sharing the wrong information
- Password-protected files — to make sure only the right people access files
- Disabled downloading — to prevent someone from sending a file to the wrong person

Improve overall client collaboration with analytics

Scenario: You're a consultant who's just starting your business, and you're lucky enough to have a strong network of contacts who are feeding you a lot of leads. You're sending several proposals, drafting a ton of SOWs, and interacting with a lot of decision makers.

You're getting *some* work … but you know you could be getting more. Most recipients won't take the time to give you feedback on your proposals, but you wish you could know what they think so you can improve your approach.

Personal client portals can't talk, but their analytics come close. Virtual data rooms are a goldmine of insights like:

- **Top performing pages**: Find out which files are resonating the most so you can figure out how to best follow up
- **Version performance:** Compare different document versions to see which ones close the most business
- **Total number of downloads**: Determine whether or not recipients are sharing your files with other decision makers
- **Content dropoff**: Assess whether or not your proposals or pitches are the right length — and revise your approach if you're seeing people drop off earlier than you'd like
- **Time spent per page**: See what kind of content people are skimming versus reading. If you see people breeze through the same sections to get to the same

page, it could be your signal to move up that content.

Want to collaborate better with your clients? You can access DocSend's virtual data room by [starting a free trial](). Virtual data rooms are part of the DocSend Standard plan for $45 per month per user.