

Customer Service workbook

Connecting with B2B Customers:

5 benefits of a digital
experience platform

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Acronyms to know

AI: Artificial Intelligence

ATP: Available-to-Promise

B2B: Business-to-Business

CRM: Customer Relationship Management

CSR: Customer Service Representatives

CX: Customer Experience

EDI: Electronic Data Interchange

ERP: Enterprise Resource Planning

KPI: Key Performance Indicator

NLP: Natural Language Processing

O2C: Order-to-Cash

SLA: Service Level Agreement

Introduction

Re-examining the role of Customer Service

Problem solvers. Multitaskers. Unsung heroes. CSRs are a lot of things to a lot of people. But as much as they do to keep a business running smoothly, they can't overcome a bad process. A bad process means a bad CX, and a bad CX? That's just bad for business.

That's where the "re-examining" comes in. Because the more time your CSRs are required to spend on paper pushing, data entry, tracking down documents, triaging customer emails, etc., the less time they have to spend on actually serving and connecting with B2B customers.

If you're looking to empower your CSRs, transform the quality of your CX, and build a more future-ready foundation for your business, this is the workbook for you.



Now, on to the 5 benefits of a digital experience platform ...

01

Proactive service

There are two ways to serve customers: proactively or reactively. B2B customers prefer the former — CSRs who can respond to email inquiries quickly and accurately, and always know why, when and where orders are being processed.

Of course, It's hard for CSRs to be efficient and knowledgeable — much less proactive — when they're up to their ears in tedious, repetitive and all-around low-value work. In a digital environment, however, CSRs are free to keep CX as their front-and-center focus.

This is achieved by not only automating manual tasks and accessing various types of AI assistance (ChatGPT, NLP, etc.) to generate fast, accurate and tone-appropriate responses to customers, but also facilitating what APQC¹ considers “top priorities” for proactive Customer Service, including:

- Improving the quality of data (e.g., fewer errors)
- Increasing flexibility to route inquiries among team members
- Identifying process improvement opportunities faster
- Increase consistency across order channels



14%

Access to AI assistance
increases the productivity
of Customer Service
agents by 14%²

02

Better engagement

It's no longer even a debate: Customer engagement is a driving force behind business growth.

These days, B2B customers flat out expect more throughout their entire journey. Live chat, social media and mobile functionality are all channels that enhance CX and boost advocacy. If only you had the time and resources for it ...

Fortunately, best-in-class automation solutions are designed to improve service engagements by reducing points of friction and offering transformative tools such as:

- Powerful analytics that provide insight into why customers are reaching out
- Internal & external chat tools that enable fast & accurate customer response
- A self-service portal for customers to place orders, manage payments, see conversation history & retrieve any information they want when they want — even from their mobile devices



88%

of customers say the experience a company provides is as important as its products or services.³

03

Fosters loyalty

Loyalty is born when actions match promises. That's why today's Customer Service teams must master the human element while meeting the expectations of their customer base.

Increasingly, these B2B expectations are closely aligned with the level of service they're getting on the consumer level (i.e., the Amazon effect). A manual Customer Service environment is, unfortunately, not cut out for these kinds of timely and meaningful interactions.

That's where a digital experience platform works its wonders — helping B2B companies offer the Best Possible CX with personalized interactions, easy order placing, fast shipping and easy returns.

If you're a customer, what's not to love?



80%

of B2B buyers expect the same buying experience as B2C customers, including real-time interactions.⁴

04

Improves team morale

There's a reason 71% of COOs have implemented or plan to implement changes in their processes to address labor shortages⁵ — you can't deliver a great CX with a disgruntled, depleted team.

But, once again, doing so is next-to-impossible when the bulk of your job consists of data entry and other tedious activities that stimulate neither professional fulfillment nor company growth.

Customer Service automation offers an elegant solution for this predicament. Not only does it radically reduce the amount of unfulfilling day-to-day tasks for CSRs with assistance from ChatGPT, NLP and other generative AI technologies, it opens the door for new career-pathing opportunities by necessarily redefining some positions. What's more, customizable dashboards make it a cinch for managers to better identify top-performing CSRs by tracking metrics tied to individual performance.

All in all, it equates to happier employees, happier customers, and higher retention of both.



9%

Attrition rates drop by **nearly 9%** within Customer Service teams that have access to AI assistance.²

05

Simplifies onboarding

Every aspect of Customer Service is tied to the overall CX. Yes, even the onboarding process for customers and new employees has a significant impact on an organization's competitive advantage. The quicker, the better.

Fortunately, the intuitive nature of AI-powered automation makes onboarding a breeze. Not only are CSRs relieved of data entry demands, previous "unknowables" like if a product was discontinued or if ATP couldn't be met, for example, are automatically flushed out and presented to the CSR.

What's more, behind-the-scenes AI tools such as ChatGPT — which can aid in inquiry response by understanding and generating natural and conversational dialogue coupled with sentiment analysis — have shown to be particularly advantageous for less-skilled, less-experienced employees, dramatically reducing the learning curve.

The result is two-fold. First, CSRs can be trained in a matter of weeks versus months, with more time to engage in actual customer support. Secondly, wooing new recruits is made easier thanks to the lack of tribal knowledge needed to manage inquiries, orders, claims and more.



3.5x

Companies that are fully committed to Customer Service as a value center drive **3.5x** more revenue growth vs. those that operate it as a cost center.⁶

Esker's AI-powered solution suite

What a digital platform looks like

To address all the challenges facing today's Customer Service teams and achieve the aforementioned benefits, Esker offers a scalable solution suite, powered by AI technology and designed to improve the entire B2B CX using transformative features such as:



Customer inquiry management

Classify, route and answer customer requests accurately and on time using a digital assistant for shared inboxes that utilizes ChatGPT and NLP tools.



Claims management

Resolve claims efficiently thanks to AI-driven data capture from supporting documents and capabilities for claims analysis and workflow investigation.



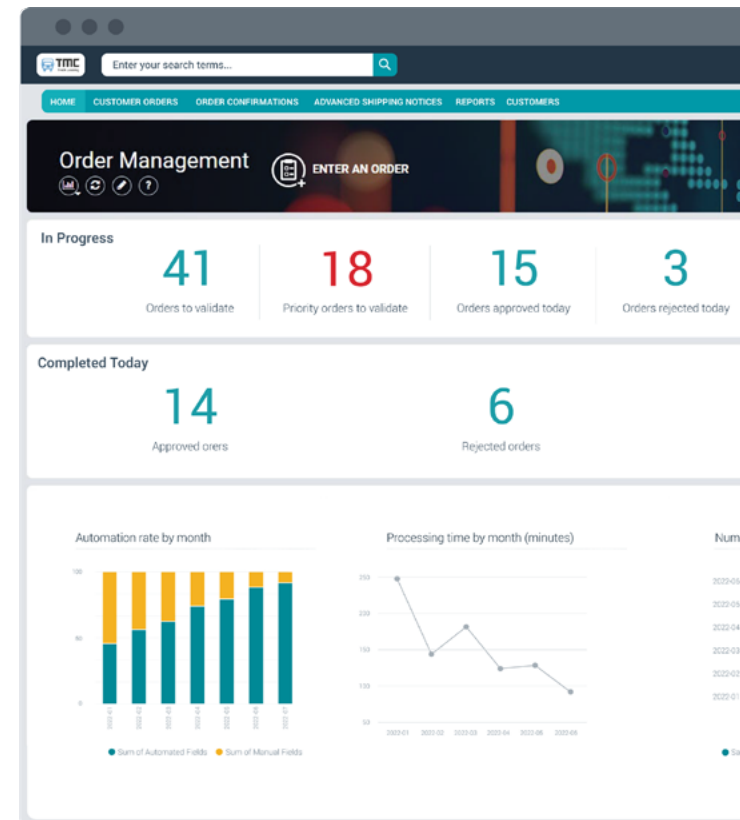
Order management automation

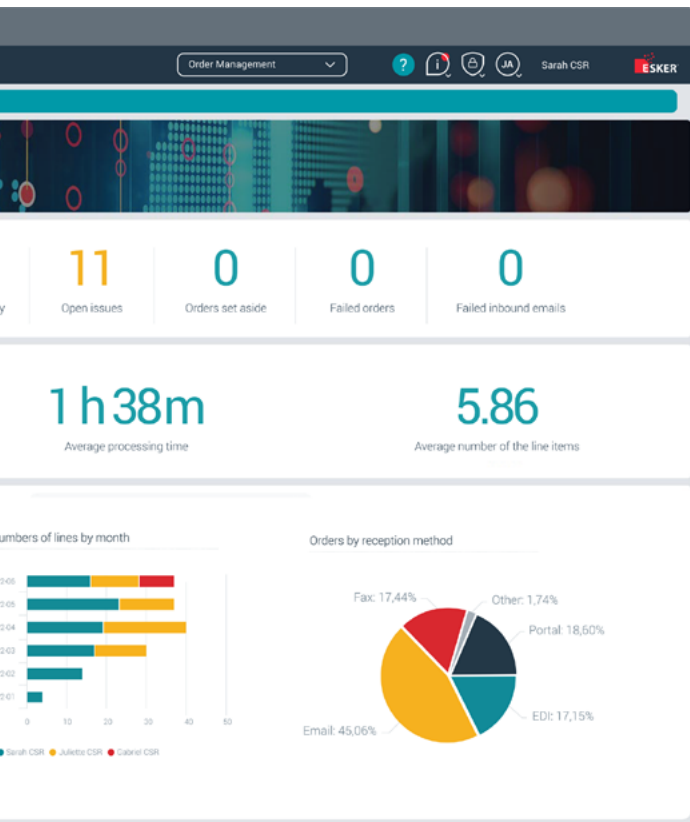
Meet every customer SLA by processing orders faster and tracking any order, in any channel or format, through one centralized cloud interface.



Self-service portal

Empower customers with a convenient portal featuring e-commerce and punchout capabilities, and an end-to-end O2C view of their invoices and payments.





Dashboard & analytics

Intelligent dashboards can be tailored to each user, helping to facilitate daily tasks, priority status, performance monitoring, and planning and forecasting.



Collaboration & communication

Internal and external conversations enable rapid research and response to customers while simplifying interactions with Sales, Supply Chain and Finance.



Tech stack integration

Install Esker alongside your existing tech stack, such as: EDI middleware/provider and ERP to create orders or credit notes or in the CRM to create cases.



Global scale

Ambitions beyond Customer Service? Esker can handle it! From full O2C to the P2P side of business, Esker's global cloud platform lets you evolve and scale at your own pace.

A statement from one of Esker's satisfied customers:

**::: “We have more time for higher-value tasks.
::: With Esker, we can now focus on our
::: customer relationships.”**

Customer Service Representative | Viega

Reduced average order processing time by 50% — from 10 minutes down to only five minutes.

Staff is less stressed with expanded roles thanks to no longer spending most of their time manually entering order data.

::::: **“We have more time for higher-value tasks.
With Esker, we can now focus on our customer relationships.”**

Powered by AI technology, Esker's solution helped Viega **process 90% of their orders electronically** and **reduce processing errors by 40%**.

Customers now have a greater trust that orders will be processed quickly and accurately — improving customer relationships.

Conclusion

Connecting with customers matters more than ever

Changes in customer behaviors and expectations have impacted over 60% of organizations' ability to fulfill orders in a timely manner, along with cost to serve and profitability.¹ And in case you haven't noticed, the world outside your company's windows is rife with disruption.

So what's there to be optimistic about?

By taking quick and decisive action in pursuing a digital experience platform, your entire Customer Service model can be realigned around engaged, proactive support. Quite simply, closing the manual gaps in your process is better for your team, customers and longevity as an enterprise.

Sources:

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- 2 Brynjolfsson, Erik. Li, Danielle. Raymond, Lindsey, R. [Generative AI at Work](#). NBER Working Paper No. 31161. April 2023. JEL No. D8,J24,M15,M51,O33.
- 3 Afshar, Vala. [How Do You Create a Better Customer Experience? Here's What Our Research Shows](#). May 19, 2022. Salesforce.
- 4 Sweezy, Mathew. [80 Percent of B2B Buyers Expect Real-Time Interaction](#). Convince & Convert.
- 5 [PwC Pulse Survey: Managing business risks](#). August 18, 2022. PwC.
- 6 [Accenture 2021 End-to-Endless Customer Service Research. 2021](#). Accenture.



Hi, we're Esker

Founded in 1985, Esker is a global cloud platform built to unlock strategic value for Finance, Procurement and Customer Service leaders and strengthen collaboration between companies by automating procure-to-pay (P2P) and order-to-cash (O2C) processes.



38

years of
experience with
20+ years focused
on cloud solutions



1,000+

employees serving
850k+ users &
1,700+ customers
worldwide



15

global locations
with headquarters
in Lyon, France, &
Madison, WI



€159.3

million in revenue
in 2022, with
90+% of sales via
SaaS activities



Business success is best when shared

At Esker, we believe the only way to create real, meaningful change is through positive-sum growth. This means achieving business success that doesn't come at the expense of any individual, department or company — everyone wins! That's why our AI-driven technology is designed to empower every stakeholder while promoting long-term value creation.

