

CUSTOMER SERVICE

Navigating the long trail:

How to Avoid Failed AI Projects in B2B Customer Service



ESKER®

About this ebook

With the average business having 21 AI projects in production¹ with no signs of slowing down, questions around quantity vs. quality have never been more pertinent. How much AI is too much? Why do so many AI projects fail? Is there actually a right or wrong way to implement AI?

This ebook dives into the considerations and preparations needed for safely and securely taking the long and, at times, treacherous path to successful AI-powered automation. Introducing both operational and Agentic AI can generate true ROI when it's applied to the right use cases, seamlessly embedded into workflows and governed by measurable outcomes.

Strap on your boots and come along as we help you plan this journey.

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The AI hype vs. reality in B2B customer service

The trail to successful AI implementation is often blocked by the same misstep: rushing in headlong with an “AI first” mindset instead of carefully assessing needs, appropriate use cases and cost effectiveness before setting out. Especially in customer service, the allure of cutting costs by replacing people with AI can lead many managers off the beaten path. Add to that the fact that B2B customer service interactions are more complex in nature, with more people involved in the processes and more significant financial impacts at stake.

Where many businesses take a wrong turn is in failing to realize that AI isn’t just another tool to toss into the pack alongside existing systems. The technology is simply too transformative for that. Instead, it takes thorough planning, such as rethinking and redesigning workflows and ensuring you have the right gear and the right people by your side, so you don’t get lost in the AI wilderness. See it as an opportunity to make impactful changes that result in effective processes and higher satisfaction both for teams and customers.



Why AI projects in customer service often fail

In its now-famous report “State of AI in Business 2025,” MIT found that 95% of companies indicated that generative AI projects failed to deliver the expected results.² After the initial shock of that message wore off, the conversation about the realities of introducing AI started taking off. Gartner reports that while traditional AI like neural networks and machine learning has actually demonstrated productivity gains, it’s the overhype of GenAI, and now Agentic AI, that creates problems. With an error rate of up to 25%, GenAI needs to be kept in check by ensuring the accuracy of its output, while AI agents are not advanced enough to replace humans as decision-makers.³

In short, many projects to implement AI in customer service fail due to:

- Poorly scoped or low-value use cases
- Lack of process clarity, data quality and workflow maturity
- Misalignment between IT, operations and customer-facing teams
- Company culture of “we’ve always done it this way”
- Staff un- or underprepared for needed tech skills
- Buying into hype, resulting in overwhelm of solutions
- Making cost savings the only factor
- Failure to consider ongoing operational costs
- Poor governance post-implementation

In essence, failure is not (always) a result of the technology itself, but because the human and organizational foundations beneath aren’t ready.

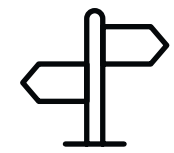


Preparation phase:

Where to begin with a successful implementation project

Fortunately, the trail is already marked with multiple guides, roadmap templates and informational waypoints to help you navigate towards the best-fitting AI tools.

A more complete list can be found at the end of this ebook, but to start on this journey, begin by categorizing customer service use cases into three camps:



Promising trails

These are paths that offer a balanced mix of manageable terrain and rewarding views: moderate to high feasibility paired with medium to high value, making them reliable routes to success in most conditions.



Strategic summits

These are ambitious climbs that promise great value but come with steeper, less certain terrain: medium to high value but lower feasibility, representing riskier ventures that could, however, lead to breakthrough vistas.



Incremental paths

These are gentler trails offering smaller gains and varying difficulty: lower value with mixed feasibility, often with optional detours that improve the journey but aren't essential to reaching the destination.



Stepping wisely on the path to successfully integrating AI into customer service

The true compass for guiding AI projects to success in customer service is a clear-eyed understanding of what AI can and cannot do. Success starts with choosing high-value, well-scoped use cases that set the course for real transformation.

Examples include:

- AI agents can handle routine inquiries instantly, freeing CSRs to focus on complex, empathetic interactions that require human nuance.
- An embedded knowledge base and quick access to relevant customer information gives CSRs the ability to respond quickly and accurately.
- AI-driven sentiment analysis tools can catch if a customer interaction via email, chat or even by voice — when, for example, AI agents are deployed — veers in a direction that suggests dissatisfaction. GenAI can then suggest appropriate responses that CSRs are able to integrate into the conversation, allowing proactive intervention before issues escalate.



Hidden terrain:

Compliance questions, security concerns & obscured expenses

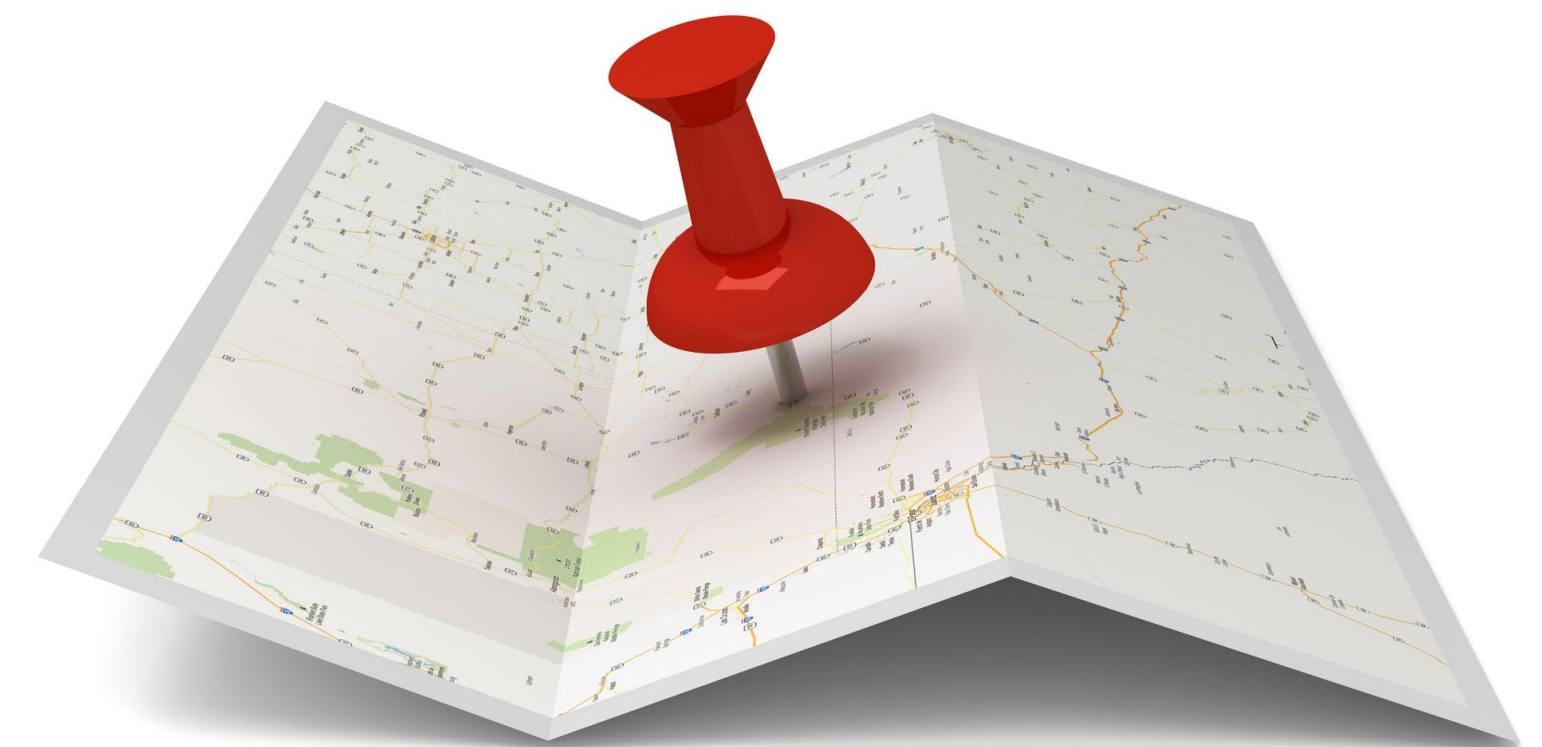
Before we even get to the implementation part of an AI project — and its potential failure — ask yourself some hard questions:

- How does the proposed solution address data security and accuracy, both internally and externally?
- How is compliance with regulatory frameworks such as the GDPR, SOC 2 or ISO 27001 ensured?
- Which costs will the business face beyond initial implementation, hidden costs and future operating costs?
- What will the AI governance framework look like?

A successful AI implementation project requires pragmatic planning: a solid roadmap instead of chasing the most instagrammed vistas. Create a strategic program that incorporates conditioning (i.e., training), shakedowns (i.e., testing gear and reducing weight), as well as zero days (built-in breaks to assess progress). In real life, this means investing in training, data quality and iterative improvement cycles that adapt AI tools to the evolving needs of both customers and CSRs.

What makes a strong AI-governance framework? The best AI tools will:

- Be embedded into core workflows without sidelining human agents
- Align with business outcomes to ensure the technology stays on track
- Prioritize customer satisfaction and operational goals over flashy but impractical features
- Foster transparency by showing how (and which!) AI actually contributes to improved service
- Advanced consideration of where further investments or a rethinking of workflows make sense



How Esker's Customer Service solutions integrate AI

Imagine a customer service solution so seamlessly integrated that it feels like an easy stroll through friendly terrain: It's a natural extension of the CSR team without fussy gear or confusing maps. Rather than a generic chatbot, Esker's Customer Service solutions are a carefully crafted solution suite tailored specifically for the unique demands of B2B environments: providing fast access to specialized knowledge, managing long-term customer relationships and coordinating multiple stakeholders.

However, this complexity also offers opportunities for deeper partnerships and sustainable business growth through exceptional service. Built right into the workflows, Esker's AI capabilities move in sync with customer processes, helping your business advance with confidence and adapt to the evolving landscapes. Behind the scenes, Esker's Customer Service solution suite is powered by transparent, well-charted technologies that meet rigorous enterprise standards, providing both control and clarity at every step of the way.

“For the monthly meeting to discuss collections activity on certain key accounts, Esker's ability to instantly pull the information for the reports has been a game changer for us. It's all right there.”

Amber Twarek
Credit Manager, Palmer Holland



Select your gear:

AI use cases in Esker's Customer Service solution suite



Use case 1

Answering customer questions (e.g., order status) in Esker Customer Inquiry Management

- LLMs translate natural language into technical queries (and vice versa).
- RAG (retrieval-augmented generation) accesses knowledge bases and then accesses LLMs to provide the answer in natural language.
- Agentic AI figures out which (agentic) tool is best suited to provide the correct answer and delivers the suitable autonomous AI agent.



Use case 2

Recognizing data on customer documents in Esker Order Management

- Esker Synergy Transformer is a deep learning neural network — especially for semi-structured document formats.
- NLP (Natural Language Processing) recognizes data in unstructured documents with free text.



Use case 3

Serving customers by providing easier and faster access to information

- Esker Synergy Agents for Customer Service are embedded into the customer portal and can answer questions or provide assistance in placing orders.
- As in Use Case 1, LLMs, RAG and Agentic AI collaborate to deliver the required information or perform tasks. However, access is limited by user permissions, ensuring customers can only view information relevant to themselves and not that of others.

How Esker helps avoid the rocky paths of flawed AI implementation



Poorly scoped or low-value use cases

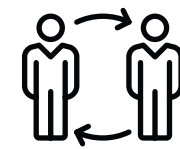
Customer service solutions like Esker Customer Inquiry Management and Esker Order Management present ideal use cases to start AI projects, featuring:

- Accurate data capture on incoming orders, independent of format
- Agent assistant: knowledge base access
- Case summarization
- Customer correspondence/ personalization
- Customer service analytics
- Human-in-the-loop AI training
- Sentiment analysis
- Routing of incoming documents, requests and inquiries



Lack of process clarity, data quality & workflow maturity

- When implementing a new automation solution, it's usually a good time to reassess existing processes, then clarify and harmonize them between different teams or entities.
- Esker solutions don't change how data is organized, but help you navigate and understand it with discrepancy detection, dashboards for visibility and report preparation for analysis.
- Esker makes it easy to access knowledge bases for information such as product characteristics, regardless of whether it's CSRs or AI agents handling the query. The data doesn't even need to be formatted in a specific way because one of the specialties of AI is the ability to identify correct information no matter the format.



Misalignment between IT, operations & customer-facing teams

- When an Esker solution is newly implemented at a business, Esker works with both your functional and IT teams to ensure buy-in from everyone involved.
- Internal communication tools and process visibility reduce siloed workflows.
- Customer portals and communications tools create clarity for customers.
- With over 40 years of experience, Esker has ample proof-of-concept to counter "we've always done it this way" arguments.



Inadequate change management or user training

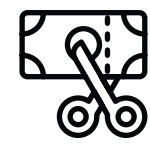
- Ease-of-use has always been a guiding factor in solution development at Esker. In practice, this means that many features are embedded in the solutions rather than add-ons. For instance, the LLMs integrated in Esker solutions upgrade automatically, without additional expense or administrative work on the customer side.
- Dedicated Esker teams work with stakeholders before, during and after implementation to ensure success on every level.



Buying into hype, resulting in overwhelm of solutions

- Although Esker does build and use “hyped” tech like Agentic and GenAI, these are natural extensions of the other established automation tech and traditional AI that has been part of the Esker toolbox for over 15 years.
- Careful thought is given to only deploying the most appropriate technology for the task at hand.
- A unified platform across both the order-to-cash and source-to-pay cycles ensures easy interplay of solutions, data and communications.

“For Fuchs Lubricants, Esker Customer Inquiry Management automatically classifies 84% of all incoming customer inquiries.”



Making cost savings the only factor

It’s not that this isn’t an important factor. The goal of any business, however, is to grow. And the secret sauce for that is keeping your customers happy.

- This is usually achieved by providing excellent customer experience, giving them accurate information quickly and fulfilling orders correctly and fast.
- By reducing repetitive and annoying tasks from CSRs, they in turn are in a better frame of mind to ensure friendly communications with customers and can dedicate more energy to complex customer situations.
- Rather than replacing headcount, any automation solution should be built to scale with the business, enabling teams to upskill and take on higher-value tasks.



Failure to consider ongoing operational costs

- Esker solutions are built to scale. This means that the computing resources necessary to handle a growing volume of queries are always available.
- Since our unified platform contains everything needed to manage customer service tasks efficiently, additional contracts for point solutions are a thing of the past.
- Keeping an overview of costs is ensured through a fixed, all-inclusive sub fee based on expected volumes. This avoids the proof-of-concept trap of low entry costs and then quickly racking up fees for add-ons, more tech and unforeseen expenses like training and maintenance.

“It takes maybe a second or two to validate an inquiry now. The time savings is one of the biggest benefits of Esker’s solution.”

Aiza Toor
Customer Service Manager,
Palmer Holland



Poor governance post-implementation

With Esker, governance is built-in, since AI capabilities are embedded in the workflows rather than running on their own or bolted on to a process.

- The AI features utilized in Esker solutions are attached to specific use cases, meaning the solution constitutes its own guardrails. For example, the GenAI used is limited to context-specific tasks rather than a generic free-for-all.
- Rather than being so-called “black boxes,” the AI always remains transparent and explainable to the users, thereby keeping humans in the loop at all times. Rather than users being the fallback to check the AI, it’s the other way around, with the humans keeping oversight and control at all times.
- With a strong focus on the customer experience both pre- and post-implementation, Esker provides customers with full ownership and clear governance along with continuous KPI monitoring to ensure that the solution provides value.

A guided journey to successful customer service AI project implementation



Step 1

Identify use case(s) with highest ROI potential

- Start by zeroing in on the customer service challenges that matter most, such as tasks that eat up time, cause errors or block the team's flow:
 - > Order inquiries
 - > Claims
 - > Pricing questions
 - > Document routing
- Use data and input from the teams directly to pinpoint where AI and automation will deliver the biggest bang for the buck.



Step 2

Determine workflows for which embedded AI would make sense

- Map out the end-to-end workflows around the selected use cases. The goal isn't to just tack AI on top but to figure out where intelligence can be woven in seamlessly.
- Natural focal points include automating repetitive steps like classification, routing or suggested responses.



Step 3

Configure, govern & implement

- Set up AI and automation tools with governance front and center.
- Select tools that:
 - > Are explainable
 - > Are easily managed
 - > Define clear ownership
 - > Establish KPIs tied to real business outcomes
- Put in place monitoring and human-in-the-loop processes to keep things transparent and continuously improving.



Step 4

Deploy with a focus on business outcome tracking

- After the go-live, track how the AI-driven workflows impact speed, accuracy, backlog and customer satisfaction.
- Use these insights to fine-tune and prove the value of the investment.



Step 5

Scale across service operations

- Once everything is humming along nicely, start looking at other processes where AI could make sense.
- Remember that AI that is embedded deeply into workflows and aligns with operational maturity delivers the best results.
- Incremental scaling keeps adoption smooth and ROI trackable.

Esker Synergy: We do AI differently

Built on 15+ years of research and development, Esker Synergy AI is the powerful set of technologies designed to address the evolving questions about AI usability, security and sustainability. Here's why Esker stands out in a sea of AI providers:

Your data stays yours.

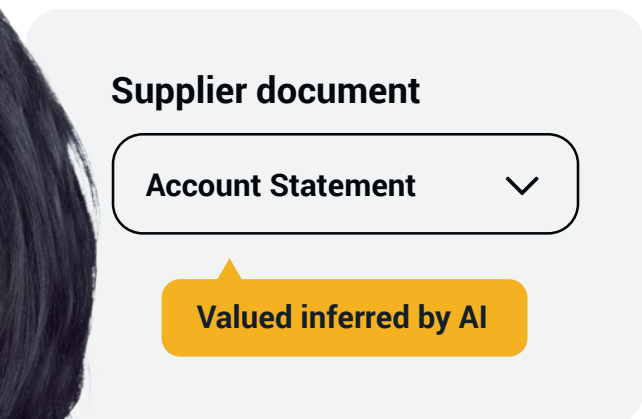
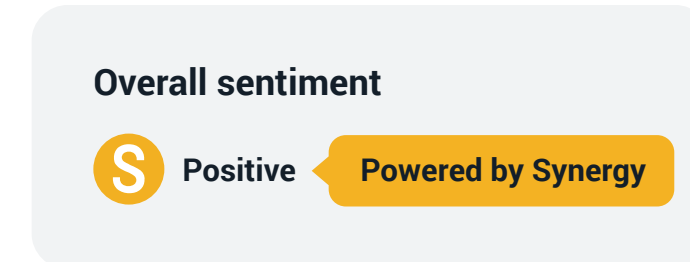
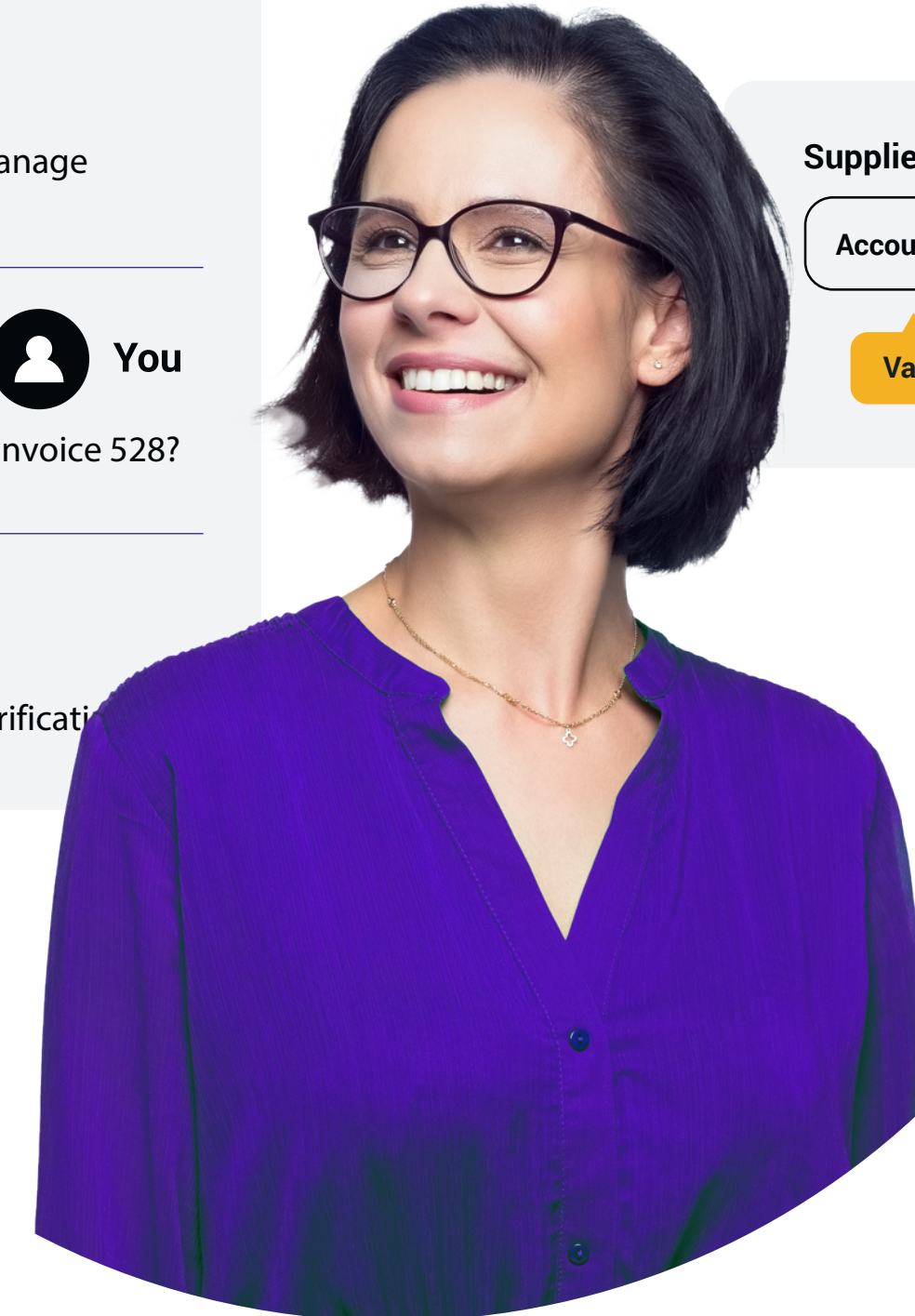
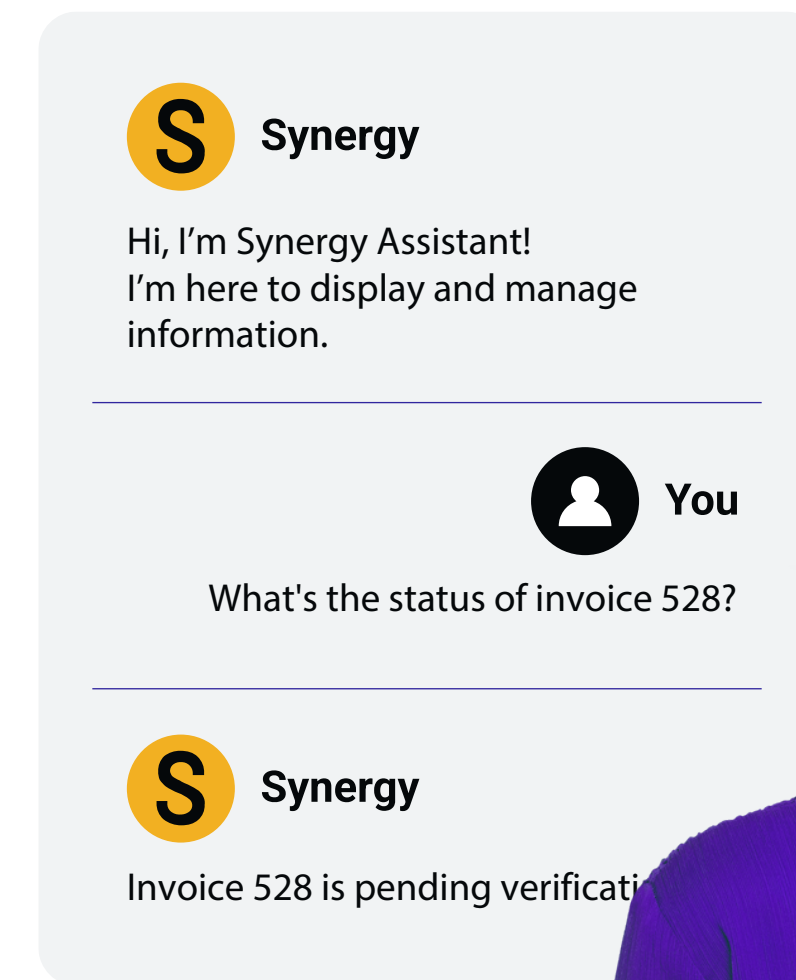
All Esker solutions and Synergy GPT functionalities are designed to ensure data security and privacy, ensuring your data cannot be used, saved or shared by third parties.

Our AI is purposeful and responsible.

We train our own LLM for targeted, purposeful and high-value AI use, while larger models run on shared servers. Our GenAI is continuously optimized for performance and sustainability.

We offer LLM-as-a-Service.

Esker Synergy GenAI is seamlessly integrated into our solutions, so you don't need a separate LLM provider. We handle prompt engineering, updates and secure scaling, lowering your total cost of ownership.





Why the winning strategy is the steady trek of pragmatic AI + operational integration

As we finish exploring the role of introducing AI into B2B customer service, the takeaway should be that success isn't achieved or measured by chasing the flashiest technology and taking shortcuts. Being practical, picking the right tools for the right challenges and treating them as a fundamental part of day-to-day operations rather than carrying extra baggage will go a long way in ensuring a sound ROI.

From our vantage point as an O2C automation platform, the real strength comes when thoughtfully selected AI tools meet well-mapped processes and clear management. This combination lays down a solid, scalable path that will help the business grow stronger with every step it takes. Instead of taking unplanned leaps, embracing a steady, thoughtful pace is the key to building impactful and successful customer service operations.

“CSRs now have more time to talk to the customers and build rapport. This allows them more time for following up on leads, training on other programs, expanding product knowledge and other things that actually add value.”

Deborah Buck
Director of Customer Care, MCR Safety

References

¹[Lindsey Wilkinson: Businesses average 21 AI projects in production, June 20, 2025, CIO Dive](#)

²[Sheryl Estrada: MIT report: 95% of generative AI pilots at companies are failing, August 18, 2025, Fortune.com](#)

³[Opening Keynote: The Golden Path to AI Value, 2025, Gartner IT Symposium/Xpo](#)

Want to learn more about how to successfully implement AI in customer service workflows? Here are a few resources to get you started:

[Customer Inquiry Management demo](#)

[This blog post about AI implementation by Forrester's Laura Ramos](#)

[Or this one about AI in B2B customer service, also by Laura Ramos](#)

[Gartner provides an AI use-case assessment guide](#)

[and has this to say about AI in customer service](#)

Hi, we're Esker

Esker's AI Automation Suite for the Office of the CFO leverages the latest in Agentic AI and automation technologies to optimize working capital and cashflow, enhance strategic decision-making, and improve human-to-human relationships with customers, suppliers and employees. Esker's Source-to-Pay and Order-to-Cash solutions automate any business process while supporting long-term growth strategies.



40+

years of experience with 20+ years focused on cloud solutions



1,200+

employees serving 1.12M+ users and 3,000+ customers worldwide



15

global locations with headquarters in Lyon, France



~€250

million in revenue in 2025



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.

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