Digital guide

Aligning People, Process & Technology

An action plan for B2B Customer Service excellence

Contents

What’s inside

Introduction 3
Customer Service processes 4
AI-driven automation 5
People 6
Process 8
Technology 10
Conclusion 12
About Esker 13
Sources 14

Introduction

Opportunity is knocking …

Customer Service is a bigger priority for today's companies than it's ever been. The unprecedented volatility in recent years has given rise to customers who expect a more personalised, responsive and around-the-clock experience. Case in point: 80% of B2B buyers expect the same buying experience as B2C customers, including real-time interactions.[1]

But with resources stretched thin and many Customer Service teams still tied to archaic, manual procedures, these expectations can be a lot to live up to, and alternatives are often (and usually incorrectly) deemed "too difficult to pursue." Consequently, any company that can step up to the challenge will separate itself from competitors. In other words, the door of opportunity is wide open.

About this digital guide

The goal of this action plan is not to reinvent the Customer Service wheel, but instead, optimise the key components — People, Process and Technology (PPT) — and develop a strategy to align them. This digital guide was created for decision-makers who are ready to expand their digital transformation efforts and achieve Customer Service excellence.

What's at stake?

The benefits of the solutions outlined in this digital guide are wide-ranging, but ultimately, they are designed to help organisations achieve three prominent objectives:

1. Free up CSRs to provide meaningful, timely interactions & pursue more fulfilling activities
2. Generate more sales opportunities through an improved CX
3. Facilitate smarter growth & a more resilient business

Customer service processes

Pinpointing the problem areas

When it comes to the overall CX a company provides and loyalty of their customers, quality of service is the great stabiliser, particularly during extended periods of rapid change and ongoing uncertainty.

Customers expect their inquiries to be answered quickly and accurately, their ordered products to arrive on time and undamaged, and any disputes that may arise to be resolved painlessly — all of this in the context of digital convenience (i.e., the Amazon effect). Should the PPT within your company be unable to fulfill these requirements, there's a good chance you'll be up a particularly unpleasant creek without a paddle.

By pinpointing the biggest problem areas within traditional Customer Service processes (see below), it enables you to better identify how to best align your PPT to improve them and what digital solutions are the best fit.

Customer inquiry management

The shared inbox remains the central point of Customer Service teams' varied communication points. Unfortunately, their cluttered and chaotic nature creates a lose-lose outcome for both CSRs and customers (lost or deleted emails, lack of clarity and context, limited collaboration, etc.).

Order management

Order management is one of the critical interfaces between buyers and sellers. Not only are traditional order-related processes strewn with menial work that's both dispiriting and disruptive to CSRs, it ultimately leads to errors and other inefficiencies that impact the customer.

Claims management

Without a standardised solution to consolidate all claim-related information, CSRs are often out of the loop when it comes to investigating customer issues such as damaged or missing products. Once again, it winds up being a mutually frustrating process with lasting impact.

AI-driven automation

The best way to align PPT & optimise Customer Service?

Despite the challenges facing today's Customer Service teams, there's reason for optimism. Digital solutions — notably those driven by the latest in AI technology — automate the routine tasks associated with managing customer requests, orders and claims so that CSRs can perform more fulfilling tasks that directly impact your customers and company. It should come as no surprise, then, that 40% of businesses cite CX as their top motivator for using AI.[2]

Anatomy of a best-in-class solution

If automation really is the best way to take on the challenges facing today's Customer Service departments, how do you spot a superior solution among all the digital alternatives available?

With this handy checklist, of course.

- **Plays well with existing systems.**

  Complexity's for the birds. Good solutions complement whatever infrastructure is currently in place with minimal upfront costs or interference with business continuity.

- **Highly flexible & simple to use.**

  Rigid is not a good business look. That's why the best solutions can handle different Customer Service scenarios while offering your team AI-driven tools to make their job easier.

- **Easy to expand & customise**

  Customer Service is just one process in the larger order-to-cash (O2C) cycle. Should you want to expand into broader O2C initiatives, your solution should easily accommodate this.

- **Brings good data into the light.**

  Look for solutions equipped with intuitive user dashboards that make every action and interaction smarter and more strategic through real-time metrics and predictive analytics.

Empowering the core of your Customer Service culture

Despite the proliferation of digital technology, real, actual people will always be the core of a good Customer Service culture. Most CSRs are highly educated, making them expensive, hard-to-recruit assets. The hurdle today's companies must overcome is figuring out how to make their employees more fulfilled while optimising their role alongside process and technology.

How CSRs are set up to fail

The reasons behind a struggling CSR team rarely stem from personal inadequacy; rather, it's because they're put in positions where their talents aren't appropriately served. For example, APQC finds that a median of 40% of orders are entered manually.3 When so much of a CSR's job involves low-value tasks, it doesn't matter how good or bad they are at doing them — it's a losing outcome since no value is added. It's the business equivalent of spinning your tires.

This cycle of inefficiency equates to:

- Low morale & increased employee turnover
- Staff feeling overworked & underappreciated
- Lack of flexibility & autonomy in daily tasks
- Decrease in customer responsiveness

3.8x

According to Gartner research, employees are 3.8x more likely to be high performing when operating in a "human-centric" work model.[4]

What automation offers

If the people on your Customer Service team are set up to fail, you don't change the people — you change the setup. By providing automation at the base level, companies can promote greater organisation and collaboration, while at the same time address the root causes of low staff productivity. Thus, automating problematic Customer Service processes provides:

Increased employee engagement.

With menial tasks out of the picture, CSRs are free to do activities that involve actually serving customers. They're able to be better at their jobs, perform tasks critical to the business, and have greater opportunities for career-pathing thanks to a base automation platform being in place.

Opportunity of performance-based rewards.

All heroes should wear their capes proudly. That's why good automation solutions equip managers with customised KPIs to easily identify and reward top-performing CSRs and upgrade the overall quality of the team.

More flexibility & job security.

The cloud-based nature of automation solutions not only enables employees to work remotely if needed, it also relieves insecurities about their job security. A strong digital foundation makes it much easier to stay competitive and resilient in the face of future disruptions.

Simplified onboarding & training.

Talented new hires aren't exactly wooed by the prospect of a long, boring and laborious training period. That's where automation solutions really deliver value. With no tribal knowledge to master, CSRs can get up to speed in a matter of weeks.

"We've been able to slash processing time for repeat orders from 5 minutes to 5 seconds. And our employees feel more empowered and productive than ever."

Angela Garceau | Sr. Director of Business Operations | NVIDIA Corporation

Achieving true end-to-end operational efficiency

The primary goal of Customer Service is simple: Keep customers happy and coming back. Having the right people and technology in place is critical, but no business can perform this vital function without a structurally sound and properly standardised process in place. Many companies sabotage their success by failing to address specific fundamental flaws.

Why manual processes make everything worse

Today's competitive business environment has a lot of companies jonesing for new ways to drive added value within their business. Customer Service stands out as an area ripe for improvement, mainly because:

- Soul-crushing, low-value tasks are commonplace, whether it's manually entering order data into the ERP or classifying, routing and answering emails.
- Visibility and accountability are in short supply, making it unnecessarily difficult for CSRs who need to perform critical tasks — particularly when they're "out of the loop" on certain order or inquiry details.
- Legacy systems are not only synonymous with tribal knowledge, the process is made all the more complex when it flows through a multi-channel, multi-ERP environment.

1 in 3 Customer Service agents admit to struggling to resolve customer inquiries promptly.[5]

What automation offers

Even if manual Customer Service processes are properly formulated, fully transparent and well-understood by users, timely and meaningful service isn't guaranteed. Digital tools are a good fit for this scenario because of their ability to deliver:

A more consistent, standardised process

Digital solutions standardise the Customer Service process so that no matter who manages the inquiry, order or claim, it's always done the same way. It also ensures consistency in determining who's in charge of what and which steps need to be taken. Some of the scenarios where this plays out include the ability of CSRs to:

- Quickly and accurately respond to specific inquiry status requests directly from the solution — either using predefined, auto-generated email templates or via suggested responses driven by ChatGPT, which can understand and respond to questions in natural and conversational dialogue coupled with sentiment analysis
- Set aside an order(s) within the solution when something needs to be clarified internally or externally (price, availability, quantity, etc.)
- Use rules to guide their decision making when processing a change order (How far along is it possible to accept a change order? What happens if the order has already been shipped?, etc.)

Fewer speedbumps & roadblocks

Automation addresses common errors, inefficiencies and lack of data access by offering:

- A self-service portal to satisfy customer preferences and further efficiencies by unburdening your team from calls or emails
- Audit trail and reporting capabilities to give CSRs real-time access into essential data (inquiry categorisation, priority orders, status of order backlog, etc.), along with an electronic recording of every action

"It used to take us five minutes to input one order and now it only takes 10-30 seconds! Our staff use this 'gained' time more valuably by talking to customers and dealing with any inquiries."

Rebecca Hunt | Customer Service Team Leader, C&P Medical

Giving your people & processes the support to succeed

If people are the actors and process is the play, then technology is the stage on which the whole production is acted out. That's what makes technology so important: You can't have effective people or an efficient process if there isn't a strong foundation behind both. Technology is a powerful tool for improving CX, but that power can only be harnessed when used appropriately.

Why simplicity is so elusive

Besides all the different categorisations of inquiries and various ways in which orders arrive, one of the biggest technological challenges faced by companies is the lack of consolidation. When you consider the amount of ERP, EDI, CRM and other applications used, along with all those accumulated through M&A activity and the number of legacy systems and manual workarounds, the cost and complexity of managing it all is astronomical:

- Lost profits due to operating inefficiencies & infrastructure redundancies
- Lack of collaboration across multiple departments & systems
- Limited business agility & access to markets
- Weakened compliance & system governance

1 in 4 businesses lack the necessary technology to engage with customers and deliver consistent experiences across multiple channels.[5]

What automation offers

Many of today's companies seem to either lean too heavily on technology to drive innovation (usually at the expense of people and simplicity) or not nearly enough (resisting technological change because, "This is the way we've always done things"). Once again, the time and costs associated with these undertakings can be oppressively excessive. Automation solutions offer the perfect balance to this thanks to several advanced capabilities that allow companies to:

Modernise without constraining customers.

Unless you're a multi-national mega corporation, doing something that only benefits you (often at the expense of the customer) isn't feasible. That's why automation solutions not only allow customers to retain certain preferences (e.g., how they submit orders), the changes that are instituted are objectively helpful (e.g., self-service portal, chat tools).

Work with virtually any business system.

Good automation solutions don't add to the chaos, they remove it. That means complementing any existing EDI infrastructure, handling different document types, and synchronising customer communications through a variety of different applications — everything from ERPs and CRMs to transport management systems (TMS).

Effectively manage change.

Leading solution providers have certified Change Management experts to work with companies during implementation to avoid lack of acceptance and help align strategies and expectations.

Become future-proof.

Companies can't evolve with the times if they're chained to their legacy systems. A strong digital foundation allows companies to better prepare for their future without technological restraints.

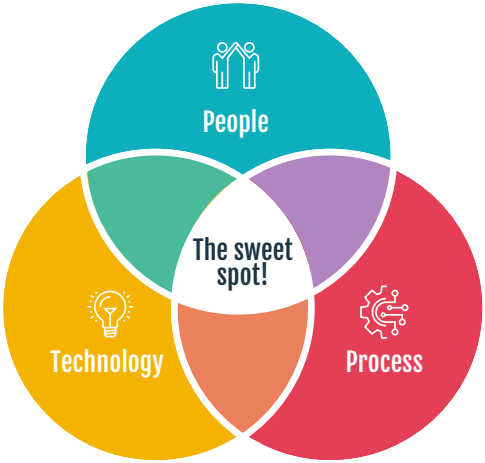
""From customer-facing digital tools to back-office technology, automation has enabled us to facilitate processing and increase customer satisfaction."

Amaia Garaikoetxea | Manager of Customer Service, Angulas Aguinaga

Conclusion

Meeting the moment

It can be said without hyperbole: An organisation's ability to align PPT and optimise Customer Service has a direct influence on its survival. And today's customers are telling us what they want — more personalisation, self-service and proactive engagement with fewer restrictions and repetition. Here's what's potentially in store for those who fail to meet the needs of modern-day customers and/or retain conventional Customer Service practices:



Employees

- Downstream supply chain issues
- Negative impact on receivables
- Chaotic IT environment
- Missed same-day shipping
- Increase in missed inquiries, order backlog, credits, rebilling, etc.

Company

- Poor CX scores
- High employee turnover rates
- Damaged reputation & lost business
- Excessive operational costs
- Risk of non-compliance

Customer Service excellence: Easy as PPT

As this digital guide has shown, the problems may be vast but the solution couldn't be more clear. Automation's ability to align PPT and allow companies to pivot around the needs of their customers is unequaled. By providing a base-level of automation, companies can centralise Customer Service functions and focus on doing bigger and better things.

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 source-to-pay (S2P) 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 subsidiaries with headquarters in Lyon, France

€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.

Sources

[1] Sweezy, Mathew. 80 Percent of B2B Buyers Expect Real-Time Interaction. Convince & Convert.

[2] Todorov, Georgi. 65 Artificial Intelligence Statistics for 2021 and Beyond. February 26, 2021. Semrush.

[3] Optimizing Customer Service. 2022. APQC (sponsored by Esker).

[4] Gartner Research Shows Human-Centric Work Models Boosts Employee Performance and Other Key Talent Outcomes, Press Release, December 7, 2022. Gartner, Inc.

[5] The State of Personalization 2021. 2021. Segment.io, Inc.

www.esker.com

EUROPE be de es fr it nl uk AMERICAS us ca ASIA - PACIFIC asia au

©2023 Esker S.A. All rights reserved. Esker and the Esker logo are trademarks or registered trademarks of Esker S.A. in the U.S. and other countries. All other trademarks are the property of their respective owners.