ESKER

Ebook

How Can AI Help You?

Transforming B2B Customer Service with Esker's AI-driven solution suite

What's inside

Balancing AI and strategic human decision-making 3
Artificial intelligence in Customer Service 4
AI in Esker's Customer Service solution suite 6
Customer Success Story: Fuchs Lubricants Co 10
Creating new opportunities 11
We do AI differently 12
AI glossary 13
About Esker 14

Balancing AI and strategic human decision-making

B2B and B2C transactions operate in fundamentally different environments, with customer service being a prime example. B2B customer service is deeply relational, involves complex problem-solving and requires collaboration between various teams, on both the supplier as well as the customer side. It also requires a smoother integration between the different back-office systems for easier contract and service-level agreement management.

AI-driven automation has been able to revolutionise B2B customer service, as the technology is now advanced enough to easily assist in the handling of complex inquiries, customer-specific nuances and multi-person processes. Technologies such as generative AI, retrieval-augmented generation (RAG) and AI agents can rapidly analyse data, retrieve relevant documentation and take the load off CSRs by handling queries based on past interactions.

But no matter how advanced the technology, human customer service representatives (CSRs) should remain the ultimate decision-makers, guiding AI tools rather than simply reacting to their outputs. AI can serve as an intelligent assistant and automate workflows, but humans are the ones who understand business relationships, can negotiate agreements and make judgment calls that can't be programmed. The best customer service approach seamlessly blends AI's speed and analytical capabilities with the strategic guidance and relational intelligence of human professionals.

Artificial intelligence in Customer Service

What is AI?

Artificial intelligence (AI) is a broad subject referring to the simulation of human intelligence processes by machines. It includes specific technologies such as natural language understanding (NLU), machine learning and computer vision.

If you are interested in knowing more, we included a short glossary of AI terms and technology at the end of this ebook.

How AI is used in Customer Service functions

AI agents are transforming customer experiences by delivering positive outcomes, even without human interaction. Unlike traditional automated systems designed to limit calls to Customer Service, AI agents actively enhance service quality. For instance, AI-driven touchless order processing ensures customers receive the exact order on time and in full, with reduced errors along the way. AI-powered chatbots provide personalised product recommendations, guiding customers to the ideal purchase.

Thanks to advancements in NLU, and RAG, AI agents understand intent and context, enabling fluid, natural interactions 24/7. Whether autonomously assisting customers or augmenting CSR efficiency, AI creates seamless experiences that leave customers satisfied and autonomous.

Concerns about AI in Customer Service

As with the Internet, the emerging AI technologies don't come without a set of valid concerns. Let's take a look at a few of them and see how they can best be addressed:

→ AI will make Customer Service too impersonal

Actually, AI can provide a streamlined user experience by filtering shared inboxes, "understand" negative sentiment in customer messages and save time by providing suggestions for applicable responses. The "augmented CSR" is often able to provide a more straightforward customer experience, 24/7.

The idea isn't to entirely remove the humans from the equation. Customers should always be able to talk to a human CSR, if they prefer.

→ If AI takes over multiple CSR job functions, what happens when there are technical glitches?

AI-CSR agents can significantly enhance customer service by providing 24/7 support, ensuring that customers can get assistance at any time. By quickly analysing and processing customer inquiries, they can deliver accurate and efficient responses and personalised recommendations based on customer data. However, human CSRs remain indispensable, by guiding AI tools with strategic insights, relational intelligence, the ability to make nuanced judgment calls and negotiate agreements.

AI in Esker's Customer Service solution suite

The interplay of the various technologies in Customer Service automation provides for a seamless process when handling questions, order placements or claims. AI does everything from categorisation, key data extraction, exception handling and automatic ERP integration, while GenAI and RAG formulate answers based on information retrieved from internal systems.

The common denominator is that AI technologies leverage large data sets to learn and improve decision-making processes:

- **Capturing data from incoming documents**
- **Classifying emails**
- **Detecting unusual quantities in orders**
- **Proposing relevant answers to customer requests**
- **Translating and summarising conversations**

Esker Customer Inquiry Management

Esker Customer Inquiry Management provides a helping hand to CSR and AR teams by auto-classifying incoming requests from any channel by type. It then routes them to either the team that is best equipped to handle them – which includes AI agents – or sends them to other applications so that the customer can get immediate answers. Incoming messages with a negative tone are identified using sentiment analysis, and RAG-assisted replies create accurate and relevant answer suggestions that can easily be personalised.

Process	AI used	What does AI do	Result
A customer sends an inquiry (pricing, availability, order status)	NLU	Analyse content of incoming emails Data extraction/sentiment analysis	Customisable AI categorises & routes emails to correct recipient/department/application Identification & prioritisation of inquiries with negative sentiments that require special attention
Data-supported response suggestions	RAG	Suggests a response to the inquiry based on internal data	Shortens response times by providing content suggestions based on factual information retrieved from internal systems
Self-service agents	Agentic AI	Provides answers to common inquiries (product questions, pricing, availability, order status)	Accurate & fast responses available at any time

A step beyond LLMs: RAG

Some of the most common questions CSRs get are:

Which product has these features? **Can I get pricing information?** **What's my order status?**

Esker Customer Inquiry Management has already been utilising ChatGPT — the AI-powered Large Language Model (LLM) from Microsoft's Azure OpenAI Services — to help Customer Service teams answer inquiries faster and free up time for more impactful functions. ChatGPT analyses inbound customer emails, queries different systems and generates answers for the CSRs to use, even tailoring responses to the sentiment of the email.

Another recent addition to the AI-tech stack is RAG, which retrieves data through APIs or from a database. These knowledge bases usually contain information from product data sheets as well as previously resolved customer service cases. This avoids hallucinations and ensures that the generated answers are based on validated and company-specific content.

The secret sauce in this is that humans are not replaced by this technology: while AI agents can handle the more straightforward issues, human CSRs can focus on more complex cases.

Order and claims management

Esker Order Management and Esker Claims & Deductions identify and then classify incoming orders and claims no matter which channel they originate from, and then forward these to the most fitting resolution unit. Similarly, order data is automatically transferred to the ERP, and urgent orders can be pinpointed and processed quickly. Anomalies are detected by analysing historical order data.

Process	AI used	What does AI do	Result
Order & claim reception	NLU	Identifies orders & claims amongst other requests or documents, pinpoints & classifies urgent orders	Correct routing of incoming orders regardless of format/channel, categorises urgent orders in separate queue for priority processing
Order data extraction	Deep learning/ neural networks	Extracts relevant data from orders using neural networks specifically designed for this function	High accuracy and fast processing even if it's the first time the solution manages this particular order layout
Order data extraction	NLU	Understands free-text orders, extracts key order information	Pre-populated form containing key order data (product codes, quantities), ready for CSRs to approve or edit, if needed
Order data extraction	Machine learning	Users make corrections from which the algorithms "learn"	Recognition improves automatically over time
Anomaly detection	KNN	Identifies orders with potential quantity anomalies, by comparing them with historical orders	Orders with potential anomalies are highlighted to CSRs who can verify them
Order self-service	Agentic AI	Customers interact with AI agent that helps them find the products that match their needs and place their order	Customers can access 24/7 product & order placement assistance, CSRs have time for more added-value tasks

Customer success story

With an average of 600-700 incoming emails each day, the Customer Service email inbox at Fuchs Lubricants Co. was in need of some serious organisation. Since the various tasks were not distributed among the 18 CSRs, everyone was doing a little bit of everything. Supervisors had neither visibility nor control over workflows and it was difficult to measure the amount of time it took to process orders.

Esker Order Management and Esker Customer Inquiry Management changed the game: NLP algorithms now sort out the shared inbox and send each item to the correct CSR, while machine and deep learning make order processing faster, measurable and seamless.

Due to a restructuring of the department that divided tasks into order entry, administrative and phone categories, the workload was rebalanced. While CSRs are now assigned to specific roles, they are also cross-trained and can perform any task when needed. Supervisors can now efficiently manage their teams rather than spending most of their time distributing emails. The interplay of the solutions provides visibility over the volume and processing speed of orders and has enabled the team to perform more customer-oriented activities.

Benefits

- Enabled CSRs to focus on specialised tasks
- Created efficient workflows
- Improved employee satisfaction
- Reduced data entry

Creating new opportunities

The fears people have about AI are valid. The impacts of unleashing powerful AI models are still hotly debated. However, just like any change, the uncertainty about abilities and effects of new technologies is an important part of the process, because only with a lively and honest debate can we make these technologies serve our needs and improve our lives.

Esker is not new to the realm of AI, having first dipped its motherboards into the technology over 15 years ago. ChatGPT and AI agents are only an addition to the wide range of technologies that Esker uses to empower both people and processes, creating more agile and disruption-proof businesses.

One of the main positive impacts that AI has for those working in Customer Service is that it will remove the monotonous, boring and sometimes frustrating tasks from these jobs, thereby having the potential to greatly improve job satisfaction.

Supporting Customer Service functions with AI can:

- Free up staff for more impactful work
- Create a foundation of sustainable and durable growth by creating efficient, long-term and resilient organisations
- Make more informed and impactful decisions

We do AI differently

Esker Synergy AI has been in the making for over 15 years, and we continuously work on addressing the evolving questions about AI useability, security and sustainability. Our wealth of AI experience and patents creates a solid foundation that good business and relationships are built on.

Security — your data stays yours

All Esker solutions are hosted on Microsoft Azure, including Synergy GPT functionalities, to ensure that the data is not used or saved by a third party. Customer data does not travel over the internet, ensuring data security and privacy. The Esker-trained AI models only respond to specific tasks. They do not process personal information, and conversations are not saved.

Esker registers at Levels 3 (limited risk) and 4 (minimal risk) for the European Union AI Act and continues to maintain the ISO 27 001 certification.

Purposeful & responsible

We only use AI in targeted, purposeful and value-added scenarios. Since some Esker Synergy AI features don't require a big model, Esker trains its own LLM. The result is a model that is approximately 600 times smaller than ChatGPT-4.

Features requiring a larger model use shared servers. This directly results in a lower carbon impact.

New models are continually evaluated for finding the best ratio between performance and carbon footprint.

LLM as a Service

GenAI features are integrated into Esker solutions and do not require a separate contract with LLM providers. Esker manages the prompt engineering, version updates and secure scaling, bringing down the cost of ownership by reducing the need for AI-trained staff.

AI-assisted responses are generated using each customer's own data to make it as up-to-date and relevant as possible, while maintaining solution-inherent data security.

AI glossary

- **Agentic AI:** AI that is designed to interact with data and tools in a way that requires minimal human intervention. With an emphasis on goal-oriented behaviour, agentic AI can accomplish tasks by creating a list of steps and performing them autonomously.
- **AI Agents:** tools built to perform specific, usually simple, repetitive tasks like answering questions or managing an email inbox.
- **ChatGPT** (Chat Generative Pre-Trained Transformer): An AI chatbot developed by OpenAI based on an LLM that enables users to refine and steer a conversation towards a desired length, format, style, level of detail and language used.
- **Deep learning:** Part of the machine learning algorithms based on artificial neural networks (*see Neural networks below*) that uses multiple layers to progressively extract higher-level features from raw input. In Esker, it recognises layouts and structures on documents and extracts relevant data.
- **Generative AI:** AI capabilities for generating text, images, or other media by learning the patterns and structures of the training data to generate new data with similar characteristics.
- **LLM** (large language model): AI that uses massive data sets and deep learning to perform a variety of NLP tasks.
- **Machine Learning** (ML): An umbrella term for problem-solving algorithms. Rather than being programmed, ML helps machines "discover" their "own" algorithms. In Esker, it improves data extraction by auto-learning from user corrections, while also utilising historical data analysis to predict outcomes.
- **NLP/NLU** (natural language processing/understanding): Technology that includes tools capable of understanding/processing text and extracting data, discerning the meaning, intent and emotion behind the input, and even proposing appropriate answers.
- **Neural networks** (in AI): A subset of machine learning that simulate the human brain's connective neurons and nodes to translate input data into desired output data.
- **KNN** (k-nearest neighbours): Machine learning classifier algorithm using proximity of data points to make predictions and classifications.

Hi, we're Esker

Founded in 1985, Esker is the global authority in AI-powered business solutions for the Office of the CFO. Leveraging the latest in automation technologies, Esker's Source-to-Pay and Order-to-Cash solutions optimise working capital and cashflow, enhance decision-making, and drive better collaboration and human-to-human relationships with customers, suppliers and employees.

40

years of experience with 20+ years focused on cloud solutions

1,100+

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

15

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

€205.3

million in revenue in 2024

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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