AUGMENTING CUSTOMER SERVICE

Providing Your Team with AI Tools that Unleash Their Superpowers

ESKER®

CONTENTS

Out With the Old... 2

...In With the New 3

Enhancing the Customer Journey 4

- How AI Helps Get Orders Right — Right From the Start 4
- Communicating & Collaborating 5
- The Customer Portal: Realigning the CSR Functions 6

Knowing What You (Didn't) Know 7

Working Together for Better Customer Journeys 8

About Esker 9

OUT WITH THE OLD...

To actually provide the excellent customer service your Marketing department always talks about, you need to take a hard look at how the work is performed by the CSR team. Are the processes still mainly manual? Do they still involve a lot of data entry and paper-based activities? Are CSRs reaching out to other team members in whatever way will get them the fastest answer to a question (i.e., leaving their desk to ask someone in person)?

Identifying process inefficiencies is a great first step, but what is crucial is to recognise the larger context:

TALENT RETENTION

If CSRs are frustrated by repetitive and error-riddled tasks, they might start looking to change jobs. Replacing an employee can cost a business up to 90% of their salary[1], so retention — and attracting new talent — is essential.

OPERATIONAL RESILIENCE

The last couple of years should have taught us all a lesson: disruptions such as pandemics, wars, natural disasters and the ensuing volatile financial markets often come with little or no warning. The ability to adapt is something that every business needs to master.

DOWNSTREAM EFFECTS

When the Customer Service team can't provide a great experience, the consequences aren't isolated to that department. Customers might jump ship, and without customers, where will the cashflow come from?

1 The Cost of Replacing an Employee and the Role of Financial Wellness, The WELL Blog, Enrich.org, 2022.

> We make every effort to make life easier for our customers. From front-end, customer-facing digital tools like the customer portal and the mobile app to the back-office technology, automation has enabled us to facilitate order processing and increase customer satisfaction."

Amaia Garaikoetxea
Manager of Customer Service, Angulas Aguinaga

...IN WITH THE NEW!

Handing off repetitive, manual and error-prone processes to intelligent automation technology that encourages collaboration and communication on all levels lowers business costs, creates visibility for everyone and, subsequently, makes customers happy and keeps them coming back. Making use of artificial intelligence (AI) doesn't mean replacing the humans with robots and algorithms, but instead profiting from the best of both worlds where, humans and algorithms interact: By replacing the tasks that are dull and susceptible to mistakes with intelligent automation, the humans can focus on interacting with other humans again.

Various AI technologies can assist in automating routine tasks so the CSR team can focus on customer success:

EMAIL TRIAGE

Natural language processing algorithms analyse incoming emails and take over the classification and routing tasks. Orders are forwarded to the appropriate software, while inquiries can be separated out and routed to CSRs for further processing.

CAPTURE ORDER INFORMATION

AI-based software solutions can leverage multiple learning technologies such as machine and deep learning. These capture the key data on incoming orders, no matter if they are received by email, EDI or even… fax. The algorithms also improve over time by taking user corrections into account.

PRIORITISE ORDERS

Priority orders, for example those with a tight requested delivery date, from priority customers or for products that need to be delivered with a particular urgency, can be captured automatically by utilising data recognition capabilities, then validated and moved along to the ERP quickly and correctly.

ANOMALY DETECTION

Delivering and processing returns of incorrect orders drains time and costs. The AI will detect unusual quantities or amounts by analysing historical order data and sending questionable orders back to the CSR for verification.

Just assume that AI is doing its thing in the background, so that the CSRs can get back to interacting with humans, not machines.

> **Automation puts us one step closer to reaching our vision of truly 'touchless' order and payment processing."**

Jan-Willem Scheele
Global Solution Expert, Customer Care and Demand Planning Service Manager, Givaudan

ENHANCING THE CUSTOMER JOURNEY

HOW AI HELPS GET ORDERS RIGHT – RIGHT FROM THE START

Traditionally, order management meant overseeing inventory and fulfilling orders. The new way of shopping that large-scale internet sellers offer has changed customer expectations: whether it's B2B or B2C commerce, the demand is now for an easy order experience, fast delivery and quick resolution should any error occur along the way. In short, "buying something" has become the "customer journey". This requires the — back-office customer service to become truly customer-facing. First of all, by ensuring that the orders are fulfilled quickly and correctly, and secondly by being able to access accurate information fast when needed.

ORDER RECEPTION & TRIAGE

All orders, regardless of type or format (email, fax, EDI, customer portal, etc.) are identified and routed to the appropriate queue for digitalised processing.

DATA EXTRACTION & VALIDATION

All relevant order information is accurately extracted, verified against ERP master data and potential anomalies signalled.

ERP INTEGRATION & ARCHIVING

Orders are automatically created in the ERP and archived for as long as previously specified, while a full audit trail of every touch point indicates the who, what, when and where.

ORDER CONFIRMATION

Order confirmation and shipping notices are sent to customers directly from the ERP via the channel the customer previously specified (email, customer portal, EDI, etc.).

> **Order entry isn't the majority of what our CSS team does, but it affects their ability to be as proactive as they would like to be with our customers. Automation has really helped free them up to do that."**
>
> **Mike Carney**
> Manager of North American Customer Service, H.B. Fuller

COMMUNICATING & COLLABORATING

Because email is still the #1 digital channel customers use to contact a company, shared inboxes offer the advantage of allowing multiple users to view and reply to emails. On the one hand, all incoming emails are in one place, but the dark side of the shared inbox is lost or overlooked emails, confusion over who will answer what, and lack of context.

AI-driven digital assistants automatically route emails to the right person who can handle that request, and if needed, they can collaborate with others through the built-in communication tools.

Here's the path that a typical inquiry takes:

Inquiry reception: All customer requests sent by email to Customer Service are received directly on an SaaS platform.

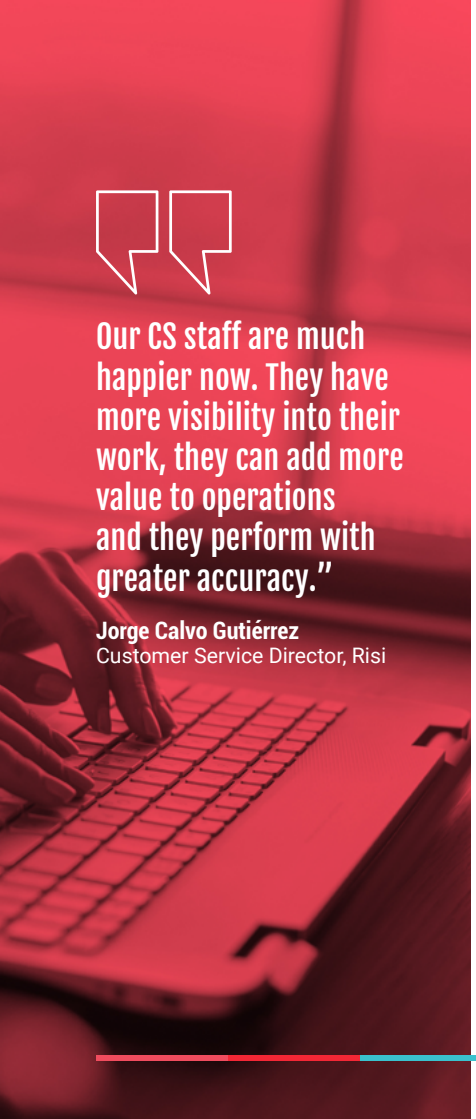
Classification: AI can classify the emails into different categories that are specific to each supplier (RFQ, order, status request, claim, etc.).

Routing: Requests are automatically routed to the correct person, department or application according to type.

Response: Collaboration and communication tools enable CSRs to provide a quick and fitting response to customer inquiries.

> **Our Customer Service personnel now have more time to closely monitor orders and provide timely responses to our customers."**

Marcela Castillo Ugalde
Regional Business Process Owner, Aliaxis LATAM



> Our CS staff are much happier now. They have more visibility into their work, they can add more value to operations and they perform with greater accuracy."
>
> **Jorge Calvo Gutiérrez**
> Customer Service Director, Risi

THE CUSTOMER PORTAL: REALIGNING THE CSR FUNCTIONS

To communicate and collaborate in a way that actually makes the customer have a pleasant experience, CSRs don't just need to be able to view information — it needs to be organised and made accessible to the right people at the right time.

Extending the accessibility of information to the customer is the next logical step, as over 60% of customers prefer to use self-service channels for resolving simple matters before contacting Customer Service.[2]

Offering customers a portal where all information related to their order is viewable and enables them to get answers to questions creates an efficient and streamlined experience. CSRs can also perform actions such as creating new inquiries and tracking both internal and external conversations so that they can answer customer questions quickly and accurately.

A portal setup empowers customers to manage their orders when they want, rather than having to write emails or make phone calls during business hours. They can:

- See purchase orders, order confirmations & advanced shipping notices
- Track the shipment status
- Place new orders — either directly from a portal, or indirectly from their company's procurement application that connects to it
- View & pay invoices

2 https://www.salesforce.com/resources/articles/state-of-service-inside-customer-service-trends/

KNOWING WHAT YOU (DIDN'T) KNOW

Having all business-relevant analytics and KPIs readily available will not only give management peace of mind by knowing what is happening but can also make the Customer Service team operate in a solution-oriented rather than problem-oriented manner.

The result? You do not need to pull data together from different sources, you can go straight to problem detection and solving. It's easy to use and helps you better understand your business and interact more effectively with your customers.

CSRs can work more proactively and think analytically and creatively, leading to a better customer service experience for everyone.

Internal data displayed in easy-to-read dashboards allows management to reallocate CSR resources depending on actual need:

- Order automation rates
- Processing time
- SLA compliance
- Inquiries by date/category
- Views filtered by customer/division/region/country

All the information that CSRs need is right in front of them so they can focus on the customers, not technology. It also enables them to give input on success metrics and focus on more critical cases, creating happier customers in the long run, too.

- Historical data for answering a customer inquiry
- Pricing/availability requests
- Open orders
- Product questions
- Change order, return, signal a claim

An automation solution provides our staff with a sense of achievement; they are also now able to connect with clients on a human scale rather than just discussing tasks."

Elaine Huang
Financial Controller, Whale Logistics (Australia) Pty Ltd

WORKING TOGETHER FOR BETTER CUSTOMER JOURNEYS

Usually, people who choose customer service as a profession consider themselves to be outgoing and enjoy interacting with others. However, when work is stressful, interactions with customers and team members can become tense, and it is hard to remain pleasant. No wonder that many Customer Service departments have a high turnover rate as experienced agents jump ship for better opportunities.

By automating repetitive and monotonous tasks utilising AI, CSRs can focus on more engaging and people-facing activities again. Customer service is also a team sport: use your company's combined information, support, processes, products, and services to meet and exceed customer expectations.

Having the team feel supported will also make them more invested in their job of providing better customer service. Solutions that automate the order management process provide visibility for everyone, promote collaboration and keep customers happy while creating new opportunities for growth and reducing the cost of doing business.

HI, WE'RE ESKER

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

37

years of experience with 20+ years focused on cloud solutions

900+

employees serving 600,000+ users & 1,500+ customers worldwide

14

global locations with headquarters in Lyon, France

€133.6

million in revenue in 2021, 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.

ESKER®

www.esker.com

EUROPE be de es fr it nl uk

AMERICAS us

ASIA - PACIFIC asia au

©2022 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.

EB-ESKER-CO-006-A