Ebook

Transforming the DNA of Your B2B Customer Service Team

A digital assistant for the shared inbox

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About this ebook

Everyone understands that Customer Service plays a significant role in an organisation's success. What many business leaders don't always know, however, is the "what, why and how" behind some of the recurring struggles that are seemingly baked in to the DNA of many Customer Service teams — struggles that can stunt growth and stagnate progress at a time when it's most necessitous.

This ebook attempts to answer those questions by examining recent Customer Service trends, addressing the elephant in the room (shared inboxes), and exploring the benefits of employing a digital assistant to help your Customer Service Reps (CSRs) work smarter, not harder.

Care, support or service?

This ebook hangs its hat on the term **Customer Service**, as it encompasses a wide range of activities, interactions and processes that contribute to the much broader customer experience (CX).

Nevertheless — care, support, service – whatever you call it is up to you. Because although the meanings and functions may vary from company to company, the shared goal remains the same: Satisfy customers!

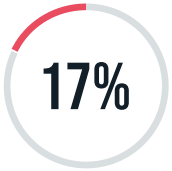
Introduction

A sea of change in consumer attitudes

The disruptive nature of the last few years served to not only accelerate underlying Customer Service trends, it was also a catalyst for many B2C consumers – 50% to be precise[1] – to hit the reset button to their purpose and priorities. This rapid shift in perspective not only affected their personal experiences (i.e., B2C), it also informed their professional ones (i.e., B2B). For example, **speed, personal connection and digital competency** are no longer hoped for when making purchasing decisions, they're expected. Case in point:

Approximately **3 in 4 younger B2B customers** (i.e., Millennials and Gen Z) are willing to pay a premium for proactive and predictive customer support.[2]

A recent study revealed that **B2B customers are 37% more likely** to purchase more from companies that listen and incorporate service feedback.[3]



A paltry **17% of companies** claim their digital experience (DX) is ahead of customer expectations, while 24% state their DX is lagging behind modern expectations.[4]

A new standard in Customer Service

The shift in customer behaviors is not the only active fault line upon which the foundation of traditional Customer Service sits. As businesses compete to differentiate themselves in a post-pandemic digital landscape, they too are forging new paths of perspective.

As a result, Customer Service – once merely a cost centre with transactional problem-solving being its primary function – is increasingly being looked to as a value-generating operation capable of shaping the end-to-end CX and driving long-term business growth. This new, more resilient set of priorities includes an increased focus on:

Proactive service > reactive service

Reactive Customer Service is like a bandage: It stops the bleeding but doesn't prevent injury. It's why proactive strategies – often powered by tech such as AI – are playing a major role in increasing customer retention and satisfaction.

Convenience & personalisation

Over 60% of customers would defect to a competitor after just one bad experience.[5] Knowing this, many businesses are centralising communications so that convenient and personalised CX is ensured, regardless of what CSR is available or who responds.

Employee empowerment

Lack of meaningful work is a big reason 70% of employees are actively considering quitting their jobs.[6] Today, the happiest CSRs spend the bulk of their time on tasks that are as fulfilling as they are impactful (upselling, cross-selling, etc.)

Lower cost-to-serve

In case you'd forgotten: Cash is still king. Yes, lowering cost-to-serve was always a priority, but as businesses look to seize on new opportunities for innovation and profitability, it's fast becoming The Priority.

Examining traditional shared inboxes

As companies attempt to meet the moment and elevate Customer Service operations, one particular element of the process is bound to draw their attention – the shared inbox. Let's examine:

The good

Email is still the No. 1 digital channel customers use to contact a company. Naturally, shared inboxes play a vital role in allowing multiple users to view and reply to emails. Within the whirling solar system of your Customer Service team's various communication points, the shared inbox is in the sun – that elemental force powering all your customer-facing business transactions.

The bad

Did we say the sun? More like a black hole. Because despite the good intentions and obvious advantages of shared inboxes, their very nature often creates a "wild west" situation where chaos and confusion are the norm, especially as email volumes rise.

Approximately 1 in 4 businesses lack the necessary technology to engage with customers and deliver consistent experiences across multiple channels.[7]

The ugly

If the inbox below invokes a negative visceral reaction, it might be time to consider a change in your computer communications management process. It's precisely because of this type of "organisation" that 62% of companies say they have failed to respond to Customer Service emails.[8]

Lost or deleted emails

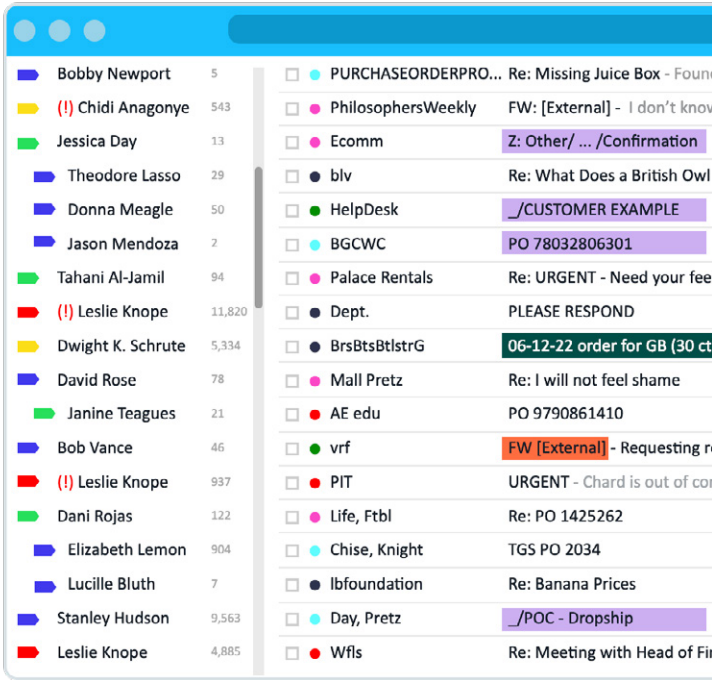
When your only point of reference is a subject line and a few sparse words, it's no wonder so many CSRs are prone to overlook or accidentally delete emails – leaving customers in the dark and other CSRs none the wiser.

Lack of clarity & context

What's more, key customer details are often hard to come by – background info, conversation history, original issue, etc. – making quick and accurate responses the exception rather than the rule.

Limited collaboration

Lastly, the inherent lack of collaboration leads to mishaps such as some customers receiving double responses (sometimes with conflicting messages). This only serves to erode customer trust and waste CSRs' valuable time.



Benefits of a digital assistant

Customer inquiry management automation is the perfect complement for Customer Service teams transitioning from cost centre to value centre. Acting as a digital assistant, automated solution clean up the mess of traditional shared inboxes, resulting in a faster, more strategic process that enables continuous improvement and **aligns with the motivations of every stakeholder.**

Impact on team

With AI-driven tools for inquiry classification and answering, collaborating and tracking at their disposal (more on all these later), your team has everything they need to proactively serve customers and provide a greater value to the company.

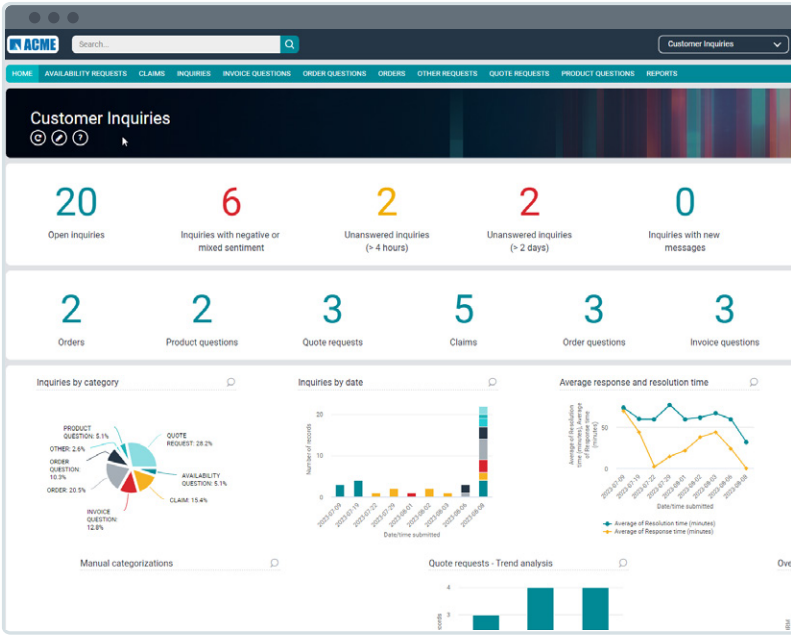
Gain visibility over current inquiries as well as trends by category, date or customer

Improved visibility on priority inquiries (identified due to negative sentiment or approaching SLA deadlines)

Reduce stress by enabling any CSR to handle any request

More time to dedicate to activities that generate real business value

Better insight into SLA compliance, CSR workload and performance trends



Impact on customers

Customers can be challenging, but they aren't complicated. When sending an email inquiry, their expectations couldn't be simpler: a quick, consistent and helpful response. Anything less is enough of a reason to drop a "thank u, next" on your company.

The impact of adding a digital assistant to your shared inbox is similarly simple: Because CSRs have all of the information they need in a click of a button, customers get the service level they expect, and thus, **keep doing business with you.**

Impact on business

Adding a digital assistant addresses the root cause of some of the biggest problem areas related to customer communications. As a result, companies are not only set up to yield an abundance of surface-level benefits (greater efficiency, cost savings, productivity, etc.), they're able to rake in a much larger, more sustainable haul in the form of strategic benefits. These include:

- **Increased employee happiness**, leading to lower turnover rates and more effective recruitment strategies
- **Higher customer satisfaction**, resulting in more business opportunities, which lead to increased revenue
- **Improved working capital** due to orders getting processed faster (i.e., faster invoicing and payment)
- **Enhanced security** by centralising all customer data and documents in one secure cloud interface
- **Greater business resiliency** thanks to all the above benefits, which contribute to a stronger business foundation able to withstand whatever future disruption or disaster awaits

2.4x

Customers are 2.4 times more likely to stay when companies solve customer problems quickly.[9]

How it works

A unified vision for your customer communications

Acting as a digital assistant for the shared inbox, automated customer inquiry management frees up your team to address inquiries faster and improve CX. Here's a bird's-eye view of how it works:

Customer sends inquiry
Your customer service team is on the clock!

Digital assistant takes over
Instead of a shared inbox, inquiries are automatically routed to the automation solution, which then initiates its "digital assistant" mode.

Flexes to your needs
Have unique classification and routing requirements? You get a say! Solutions worth their salt can adapt the workflow to specific suppliers' needs.

Plays well with others
Have an ERP, CRM, WMS or TMS in the mix? No worries! Automation solutions work with whatever application(s) you already use, promoting cohesion over chaos and answers over questions.

AI-driven classification
Incoming inquiries are classified into customised categories thanks to the solution's ability to learn and continuously improve.

Strategic responses
Categorised emails can then be answered by CSRs with AI-assisted answers (either template-based or ChatGPT-generated).

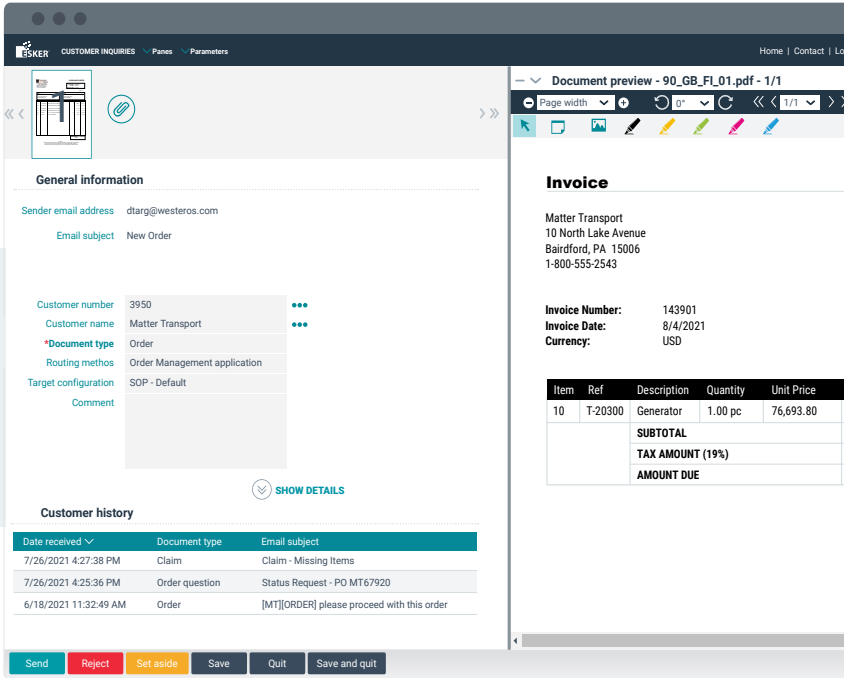
Communication & collaboration
Clarity and context are ensured throughout thanks to convenient communication tools designed for both internal and external use. Additionally, Salesforce integration gives sales reps full visbility over customer activity.

Tracking & analytics
Every user — from CSRs to CFOs — can customise their dashboard to display and measure the analytics that matter most to them.

AI-driven classification

In an automated customer inquiry management environment, all emailed requests are directly routed to the cloud solution. Once there, the AI algorithms – specifically, natural language processing (NLP) – working behind the scenes classify customer inquiries into categories that are predetermined by your company. Orders, requests, claims ... they're all separated from the pack and placed where you want them.

The magic of NPL lies in its ability to analyse content in the email body and potential attachments in order to automatically determine the inquiry category and emotional tone. Sentiment analysis is performed to identify and prioritise inquiries with a negative tone, so CSRs can answer them first.



AI does the heavy lifting so that your CSRs don't have to!

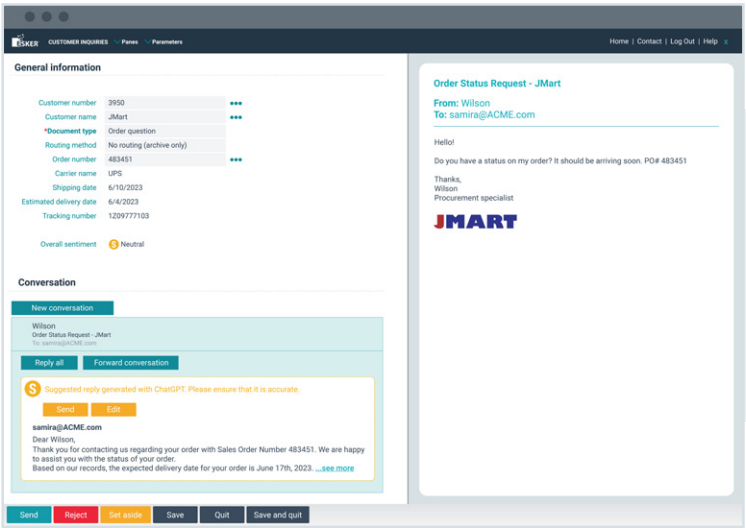
The solution automatically classifies each email by "Document type" saving your CSRs the time-consuming burden of searching and sorting through the shared inbox.

Strategic response

Categorising inquiries is one thing, but answering them? That can be a whole other knot for your service team to untangle. Thankfully, automation enables inquiries to be quickly and easily answered via strategic response and routing capabilities.

AI-assisted answers

AI technology is used to aid CSRs in creating rapid, relevant and consistent inquiry responses regardless of which CSR is handling the inquiry. The AI analyses incoming emails, extracts key information and queries different systems to suggest an answer for the CSR to use (either template-based or custom generated by ChatGPT). The generated answers are reviewed by the CSR and easily edited before being sent.



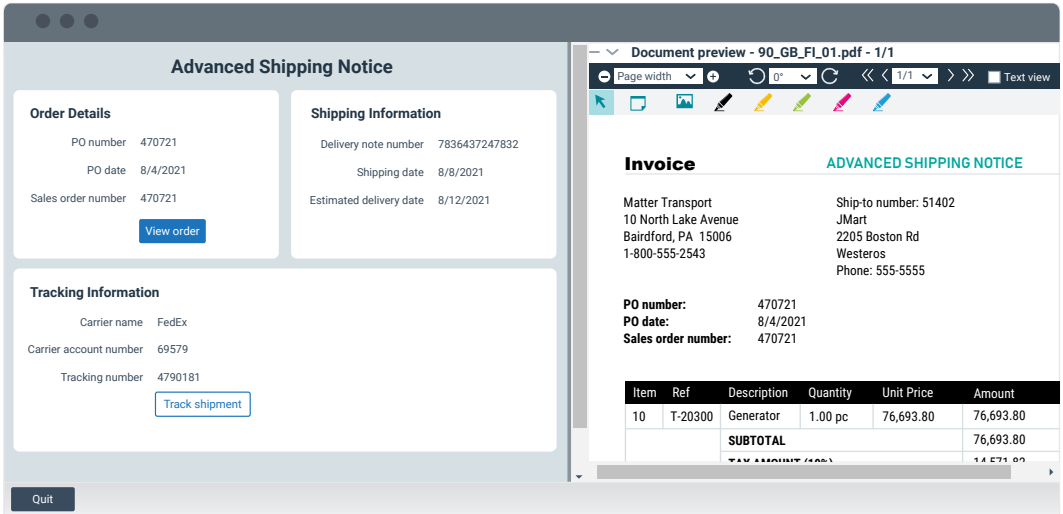
Solving the "Where's my order?" problem

AI-assisted email responses provide your customers with an Amazon-like experience, while saving your team from a fate of endless status updates.

Bonus: The emails can be personalised to match the brand identity of your company.

Customer portal

These emails can also include a link to a customer portal that, when clicked, lets the customer view the advanced shipping notice, PO and any other confirmations related to their order. Customers can also track the status of their shipment directly from the portal.



Automatic routing

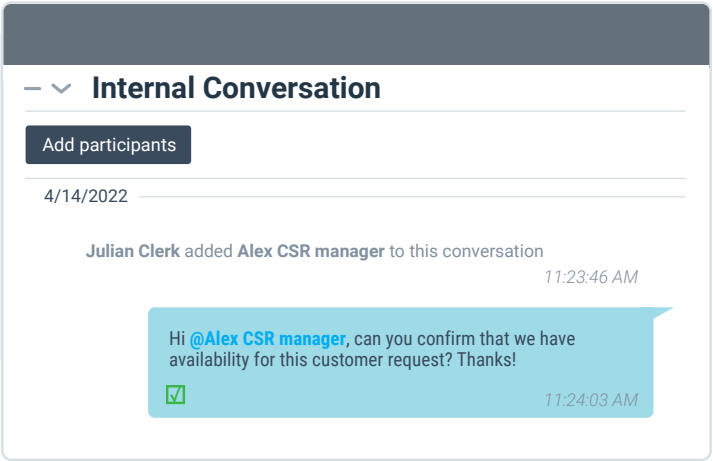
If inquiries cannot be answered by your Customer Service department, they can easily be routed via email to those who can – as if it were sent directly to their inbox by the customer.

Collaboration & communication

During the process of responding to a customer inquiry, it may be necessary for one CSR to gather information from one or more coworkers or external partners. Once again, customer inquiry management automation makes this type of collaboration a breeze by enabling internal and external conversations to be initiated directly within the solution.

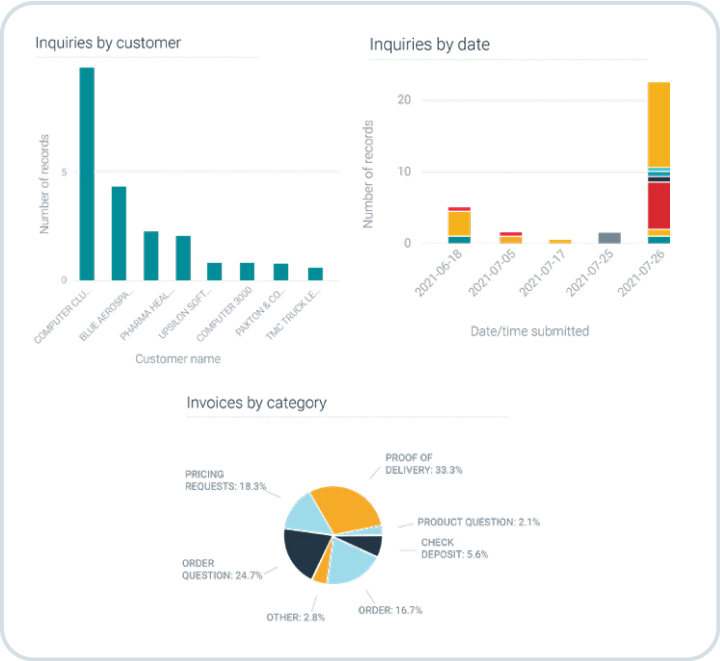
Automated solutions also allow customers to receive answers via email and gives them the option to have real time information exchange on the customer portal. Added bonus: The solution stores shared information so that both parties can refer back to it as needed – a great safeguard against potential drama caused by misunderstandings.

"I get by with a little help from my friends"
Customer Service may not have been the source of inspiration for these Beatles lyrics, but the sentiment holds true – good collaboration goes a long way. When you need critical information in a pinch, the communication tools built into the digital assistant are like music to a CSR's ears.



Tracking & analytics

Like a skilled landscaper, solution dashboards help you manage the overgrowth of inquiry data and information by weeding out the bad, accentuating the good, and shaping it all into something beautifully functional. From prioritising your day to predicting future trends, all the actionable insights necessary for improving CX can be accessed in one clean, central location.



The ultimate day planner for your team

"What should I prioritise?" "Is that CSR really that busy?" Users can customise their dashboards to answer these and other pertinent questions in just a few clicks thanks to the live analytics display.

Leave no trend left unexamined

Advanced reporting and forecasting features are like high-powered binoculars for managers – allowing them to scan the landscape and identify problems and opportunities before it's too late.

Success story

As a growing North American specialty chemical and ingredient distributor, Palmer Holland knows a thing or two about innovation and process improvement. So, when the company wanted a more modern solution triaging and analysing its 5,000 monthly customer requests, it sets its sights on the "best of the best" in AI-driven solutions – customer inquiry management solution.

Results:

- **Time savings**: Prior to automation, one employee dedicated at least four hours per day to routing emails to CSRs. Now, one inquiry can be validated in just seconds.
- **Increased accuracy:** The quick-learning AI engine is able to classify inquiries correctly for CSRs over 90% of the time.
- **Smarter growth:** Palmer Holland was able to maintain its booming growth without having to increase headcount.
- **Faster onboarding:** The solution's intuitive interface allows faster onboarding of new CSRs while simplifying the training process.

"It takes maybe a second or two to validate an inquiry now. The time savings – particularly for our CSRs – is one of the biggest benefits."

Aiza Toor | Customer Service Manager, Palmer Holland

Read success story

Conclusion

Ready to make your transformation?

Today's Customer Service landscape is one of wholesale change – new motivations, new expectations, new ways forward. Now is not the time to stand pat or rest on past laurels. Automated inquiry management is proven to be a relatively light investment capable of generating a positively powerful impact on your team and, in turn, your customers and company.

The ability to seize this opportunity can be summed up in one simple equation:

Change in mindset

Start by reimagining customer service. What value do you want to deliver to your customers? What's the most effective way to it? What makes your service stand out? If your current operation isn't part of the answer, it's a big part of the problem.

+

Change in technology

Once your mindset around Customer Service has shifted, you need to explore what tools are most effective in enabling proactive and predictive service. If AI-driven automation is right for your company, the results can be transformational.

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Change in DNA

By simply embracing these necessary changes, customer service teams can alter their very DNA to be more competitive in this "survival of the fittest" landscape – driving greater loyalty, new revenue streams and unimpeded path to growth.

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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 locations 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.

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