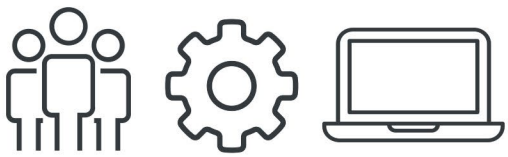
ESKER®



ALIGNING PEOPLE, PROCESS & TECHNOLOGY

An action plan for customer service excellence

www.esker.com



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WARNING!

This ePaper is highly sharable.

No one likes a hoarder. If you find this ePaper to be interesting and insightful (and we hope you will), be sure to spread the good word on your favorite social platform.

INTRODUCTION

CUSTOMER SERVICE IS MORE COMPLEX THAN EVER. THAT'S NOT NECESSARILY A BAD THING.

Customer service is a bigger priority for companies today than it's ever been. The digital age has given rise to customers who demand a more personalized, responsive and around-the-clock experience. Rather than remaining a back-room department, customer service is now expected to be more strategic — but with resources already stretched thin, these expectations can be a lot to live up to.

So why is this supposed to make you feel all warm and fuzzy? **Because the door of opportunity is wide open.**



Opportunity's knocking...

60%

OF ORGANIZATIONS ANTICIPATE **CUSTOMER SERVICE** TO BE THE TOP SOURCE OF COMPETITIVE DIFFERENTIATION IN THE NEXT THREE YEARS.[1]

1. Dutta, S. (May 2014). Service Transformation: The Business Case. The Service Council.

Despite technological advancements, most customer service departments are still heavily tied to archaic, manual procedures (e.g., order processing) that restrict their ability to adapt to this new normal. Any company that can step up to the challenge will separate itself from competitors.

This ePaper was created for decision-makers who are ready to take that next step. The goal of this action-plan is not to reinvent the customer service wheel, but instead, optimize the key components that make up the experience — **People, Process and Technology (PPT) — and develop a strategy to align them.**

WHAT'S AT STAKE ...

The benefits of the solutions outlined in this ePaper are wide-ranging, but ultimately, they are designed to help organizations achieve two prominent objectives:

- More sales through improved customer experience
- More growth and innovation through cost reduction

YOU DOWN WITH PPT?

Yeah You know me.

Abbreviations are all well and good. Unless you're out of the loop, that is. If you're unfamiliar with the ones used in this ePaper, we've got you covered. Here are some definitions for when a refresher's in order.

EDI: Electronic Data Interchange
ERP: Enterprise Resource Planning
CRM: Customer Relationship Management
CSR: Customer Service Representative
KPI: Key Performance Indicator
M&A: Mergers & Acquisitions
O2C: Order-to-Cash
PO: Purchase Order
PPT: People, Process & Technology
SaaS: Software as a Service

ORDER MANAGEMENT

A BRIEF RUNDOWN OF THE PESKY PROCESS THAT AFFECTS PPT MORE THAN YOU THINK

This ePaper separates PPT and breaks down some of the key challenges associated with each, along with the solutions for aligning them … and we'll get to all that soon.

First though, let's touch on something that will also be talked about a lot — order management. Not only are traditional order-related processes strewn with bottlenecks, errors and other inefficiencies that impact customer service, the end goal is no longer just about filling orders.

Think of it this way: **Order management is one of the critical interfaces between buyers and sellers.** Customers expect to get the products they want on time and undamaged. If the PPT within the company can't fulfill these requirements, there's a good chance you'll be up a particularly unpleasant creek without a paddle.

Yikes! Good thing you're reading this ePaper. Let's get down to business.

Anatomy of a good

AUTOMATED ORDER PROCESSING SOLUTION

Adopting automation technology is one of the **best ways to optimize order processing** and align PPT. How do you spot a superior solution from a mile away? With this handy checklist, of course.



✓ **Easily integrates with existing software.**
Complexity's for the birds. Good automation solutions complement whatever infrastructure is currently in place with minimal upfront costs, downtime, or interference with customer software relationships.



✓ **Promotes customization and collaboration.**
Rigid is not a good business look. Solutions should make life easy for their users with things like custom business rules, web portals and chat tools.



✓ **Makes data fully visible and reportable.**
Look for solutions equipped with intuitive user dashboards that make every action and interaction smarter and more strategic.



✓ **Simple to use and highly flexible.**
Good solutions are fluid in the way they can be used, even in diverse use cases — simplifying sales service and training in the process.



✓ **Emphasizes safety and security.**
Best-in-class providers commonly offer SaaS solutions and ensure the necessary safeguards are in place for compliance and peace of mind.

SUCCESS STORY

WHEN THE RIGHT PPT STRATEGY MEETS THE RIGHT AUTOMATION SOLUTION, THE RESULTS ARE A THING OF BEAUTY. JUST ASK MEDRAD.

*"Order processing automation enables customer service to work **smarter, faster,** and be **more responsive** to our customers. It's a wonderful tool."*

DIRECTOR OF GLOBAL CUSTOMER SUPPORT | MEDRAD

MALCOLM BALDRIDGE NATIONAL QUALITY AWARD
TWO-TIME WINNER FOR CS AS A TOP 3 BUSINESS STRENGTH

$432,708
IN TOTAL FINANCIAL COST SAVINGS

PREMIER PINNACLE AWARD
WINNER 4 YEARS IN A ROW

BACKGROUND

MEDRAD's previous customer service environment was a 100% manual operation. With 86,000 fax orders to process each year, the workload was outpacing headcount, causing overall customer service to suffer (e.g., order backlogs, order entry errors, compliance concerns, etc.) and employee morale to dip.

Seeking a way to harmonize its PPT and bring stability to customer service, MEDRAD chose to integrate an automated order management solution with its existing SAP® system. Today, the process is automated with data from fax orders being captured and automatically populated in SAP.

Who is MEDRAD?

MEDRAD®
Performance. For life.™

MEDRAD, Inc. is a business of Bayer Medical Care. As a developer, marketer and servicer of medical devices used to diagnose and treat disease, MEDRAD's product offerings include fluid injection systems for radiology and cardiology, endovascular devices for the safe treatment of cardiovascular disease, magnetic resonance compatible accessories, and equipment services. The company's world headquarters is near Pittsburgh, Pennsylvania.

RESULTS AFTER 4 YEARS

Since implementation, MEDRAD has injected new life into its PPT and positively transformed its customer service department.

METRIC	BEFORE	AFTER
Automated orders	0%	**48.6%**
Order entry time	7 minutes	**58 seconds**
Auto-doc archiving	0%	**61%**
Order error rate	1.6%	**0.4%**
Employee satisfaction	68%	**81%**
Employee turnover	10%	**2%**

PEOPLE

EMPOWERING THE CORE OF YOUR CUSTOMER SERVICE CULTURE

Each element of PPT plays an important and interconnected role in the nurturing of positive customer experiences and the success of the company as a whole. However, even though technology may have outpaced the evolution of humans in virtually every aspect of our life, 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 optimizing their role alongside process and technology. Automation can change a CSR's job, yes, but it's a positive change of going from transactional duties to added-value work.



WHY PEOPLE SUCCEED

People in customer service positions want to do their jobs effectively. The primary reason they fail almost never stems from personal inadequacy; rather, it's because they are put into positions where their talents aren't appropriately served.

For example, if the daily activities of a CSR include performing repetitive, low-value tasks like entering order data or constantly managing issues caused by old and/or complex technology, it doesn't matter how good or bad they are at their jobs — it's still a lose-lose scenario because there's no value added. It's the business equivalent of spinning your tires.

What effect does this cycle of inefficiency have?

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

2. 2011 Global Customer Service Barometer: Market Comparison of Findings, (2011). Echo Research.

ORDER MANAGEMENT AUTOMATION:
REDEFINING CUSTOMER SERVICE & REVITALIZING PEOPLE

If the people in customer service 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 organization and collaboration, while at the same time address the root causes of low staff productivity. Order processing automation:

Increases employee engagement.
With manual data entry 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 plus, have greater opportunities for career-pathing thanks to a base automation platform being in place.

Enables performance-based rewards.
All heroes should wear their capes proudly. That's why good automation solutions feature customizable dashboards with KPIs so managers can identify and reward top-performing CSRs, as well as upgrade the overall quality of your team — poor performers can't hide when you have great reporting.

Gives staff members more mobility.
Customer service staff have a lot to juggle which puts a premium on convenience. The cloud-based nature of some automation solutions addresses this by allowing employees to work remotely if needed. Plus, with a base platform in place, it makes training far easier.



Turn those frowns upside down.

COMPANIES WITH RECOGNITION PROGRAMS THAT ARE EFFECTIVE AT IMPROVING EMPLOYEE ENGAGEMENT HAVE A

30%

LOWER VOLUNTARY TURNOVER RATE.[3]

CUSTOMER SERVICE VS. CUSTOMER EXPERIENCE
What's the difference?

The business world loves its buzzwords (who could forget synergy?). Today, few terms are more pervasive than customer experience. Let's explore how it relates and differs from customer service:

Customer Service
is the delivery of service to a customer before, during or after their purchase. In other words, it's something that helps shape the customer experience — not define it.

Customer Experience
is the sum of all direct and indirect interactions a customer has with a company. Essentially, it's what the customer thinks about who they're doing business with.

3. Bersin & Associates Unlocks the Secrets of Effective Employee Recognition. (2012, June 12). Retrieved from https://www.bersin.com/News/Content.aspx?id=15543

PROCESS

ACHIEVING REAL END-TO-END OPERATIONAL EFFICIENCY

The primary goal of customer service is simple: Keep customers happy and coming back in the most efficient and cost-effective way possible. Having the right people and technology in place is critical, but no business can perform this vital function without a structurally sound and properly executed process in place.

Many companies sabotage their success by **failing to address fundamental flaws in the process.** When common issues arise, such as staffing or software limitations, the default response is often shortsighted (e.g., throwing more employees or applications at the problem). Customer service is typically under-invested which means there are often multiple solutions in place just to stay afloat. These quick-fixes add up over time, turning the process into a tangled web of manual touch points.



WHY MANUAL MAKES EVERYTHING WORSE

Today's competitive business environment has a lot of companies jonesing for new ways to drive added value within essential document processes. Traditional order management stands out as an area ripe for improvement, mainly because:

Orders have to be manually keyed in. Nothing slows down the O2C cycle like the inevitable data entry error. Is there anything more soul-crushing for a CSR than doing order rework? No. No, there isn't.

Visibility is in short supply. In a manual environment, orders aren't actually trackable until they reach the ERP system, and are often filed as paper copies. Good luck locating that missing order or responding to a status inquiry — you're going to need it.

Knowledge is tribal. When using legacy systems, critical order knowledge is often only known to select staff members. This can be a problem during vacation or departure, and can make audit procedures very interesting (and not in a good way). This also opens the door to compliance issues due to people operating outside of what should be standard practices.

4. Customers 2020: The Future of B-to-B Customer Experience, 2014. Walker Information.

ORDER MANAGEMENT AUTOMATION:
A PROVEN PERFORMANCE ENHANCER FOR A STRUGGLING PROCESS

An effective order management process ultimately boils down to execution. If each stage of the process is properly formulated, fully transparent, and well-understood by its users, executing quick and accurate order fulfillment is all but guaranteed.

Order processing automation is such a good fit for this scenario because every order that a company receives goes through the solution en route to the ERP system. No extra applications to bounce around in. No added bottlenecks or blind spots. No more headaches.

AUTOMATED DATA CAPTURE means that CSRs don't have to enter data manually anymore. So long, order errors, it was nice knowing you (just kidding, it was awful).

ORDER ACCURACY allows for a quick fulfillment process and provides clarity and discipline relating to the customer service proposition.

AUDIT TRAIL & REPORTING capabilities provide real-time access to the status of your order backlog, along with an electronic recording of every action. No detective work necessary.

ELECTRONIC ARCHIVING allows orders to be searched and accessed by all authorized personnel from any location and for as long as needed.



Industry impact

Life Sciences

Missed orders can lead to lost revenues and a damaged business reputation. In life sciences, however, the stakes are much higher, as certain orders can literally have life or death consequences to a patient.

Food & Beverage

For food and beverage companies, supply chain speed is imperative. Why? Because any production or delivery delay means that perishable items are wasted and consumers may purchase another product on the shelf.

Building Materials

Lack of oversight into distribution centers is an issue with many building material producers — not only does it make predicting supply chain and staffing needs more difficult, it adds costs via employee overtime.

5. Cutting the Costs of Sales Order Processing, 2015. APQC. PDF file.

TECHNOLOGY

GIVING PEOPLE AND PROCESS 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 acting out.** (If only customers showed the same level of patience as theatre-goers).



That's what makes the role of 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 customer service, but that power can only be harnessed when used appropriately. As you will see, more is not necessarily better.

WHY SIMPLICITY IS SO ELUSIVE

Besides the different ways in which orders arrive (details below), 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 business applications used by the average company, 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 and infrastructure redundancies
- Lack of collaboration across multiple departments and systems
- Limited business agility and access to markets
- Weakened compliance and system governance

EXAMINING THE 3 MOST PROBLEMATIC WAYS SALES ORDERS ARRIVE

Orders can come in other ways, of course, (e.g., portal, phone, etc.), but these three cause just a little more problems than others.

By Fax

Ask any CSR and they'll tell you: Fax is alive and well. The reason fax orders are such a pain is that they typically require a separate environment for capture and distribution; CSRs then have to enter the data in the ERP system.

By Email

Lots of companies send POs to their suppliers via email. This might help reduce paper on the customer side, but CSRs aren't as lucky — they still have to print the email, grab it, walk back to their desks and key it in just like a fax order. Yippee.

By EDI

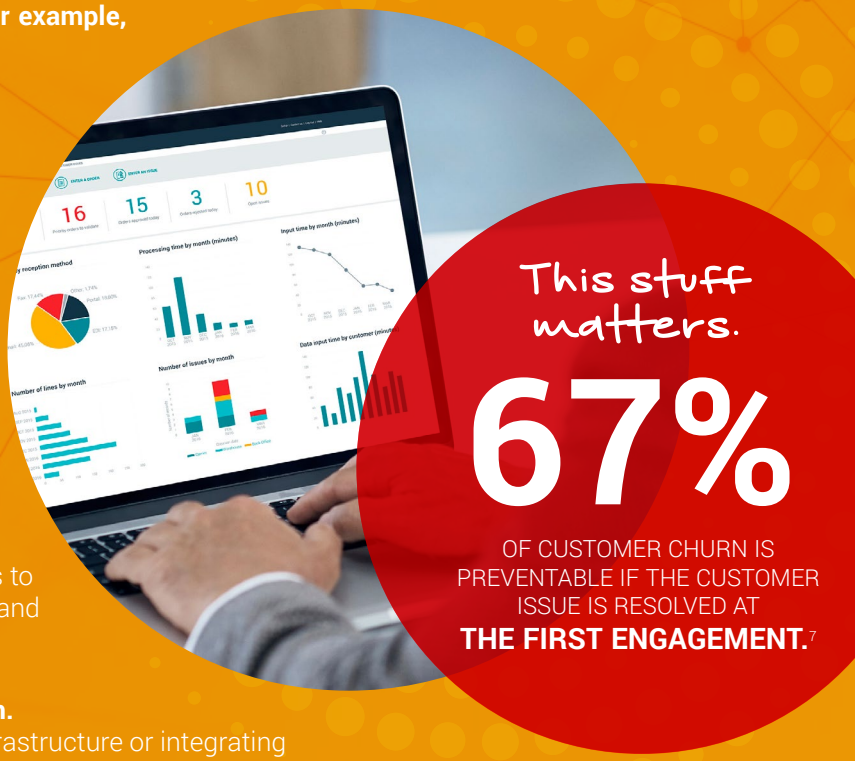
Orders sent via EDI are a step in the right direction, but far from perfect. Often times, as many as one-third of EDI orders can contain exceptions, and correcting item details in the EDI file is often a time-consuming nightmare for CSRs.

6. Global and Regional M&A: 2015. January 5, 2016. Mergermarket. PDF file.

ORDER MANAGEMENT AUTOMATION:
ONE PLATFORM THAT CURES THE MODERN PAINS OF TECHNOLOGY

Out of the three elements of PPT, technology arguably has the most polarity associated with it, in that, 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.

Order management automation solutions offer the perfect balance to this thanks to a number of advanced capabilities. **For example, automated order processing allows companies to:**



Electronically process any order. Unless you're a multi-national mega corporation, forcing customers to change their preferred order submission methods or formats isn't feasible. Automation addresses this by automatically capturing every order, regardless of how it arrived, and instantly dispatching it to the right CSR.

Ensure accuracy via data capture. In the past, OCR technology was as good as it got — not today. Leading solutions use intelligent data capture technology that goes beyond just reading characters to accurately extract data from image files and even recognize orders.

Work with virtually any business system. From complementing an existing EDI infrastructure or integrating with multiple ERP systems to handling different document types and being fully flexible, good order management solutions don't add to the chaos … they remove it.

Effectively manage change. Even the best order processing solutions can fail if users don't accept or understand the new technology. That's why leading solution providers have certified Change Management experts to work with companies during implementation to help align strategies and expectations.

Become "future-proof." Companies can't evolve with the times if they're chained to their legacy systems. Cloud-based automation's flexibility and automatic upgrades allow companies to better prepare for their future without technological restraints.

7. ThinkJar annual survey and associated ThinkJar research, 2016.

CONCLUSION

FUSION, ALIGNMENT, HARMONIZATION — WHATEVER YOU CALL IT, JUST MAKE SURE PPT IS IN YOUR PLANS.

It can be said without hyperbole: An organization's ability to align PPT and optimize order management has a direct influence on its survival. A business can't exist without customers, and today's customers are telling us what they want — more personalization, 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 order management practices:

Employees

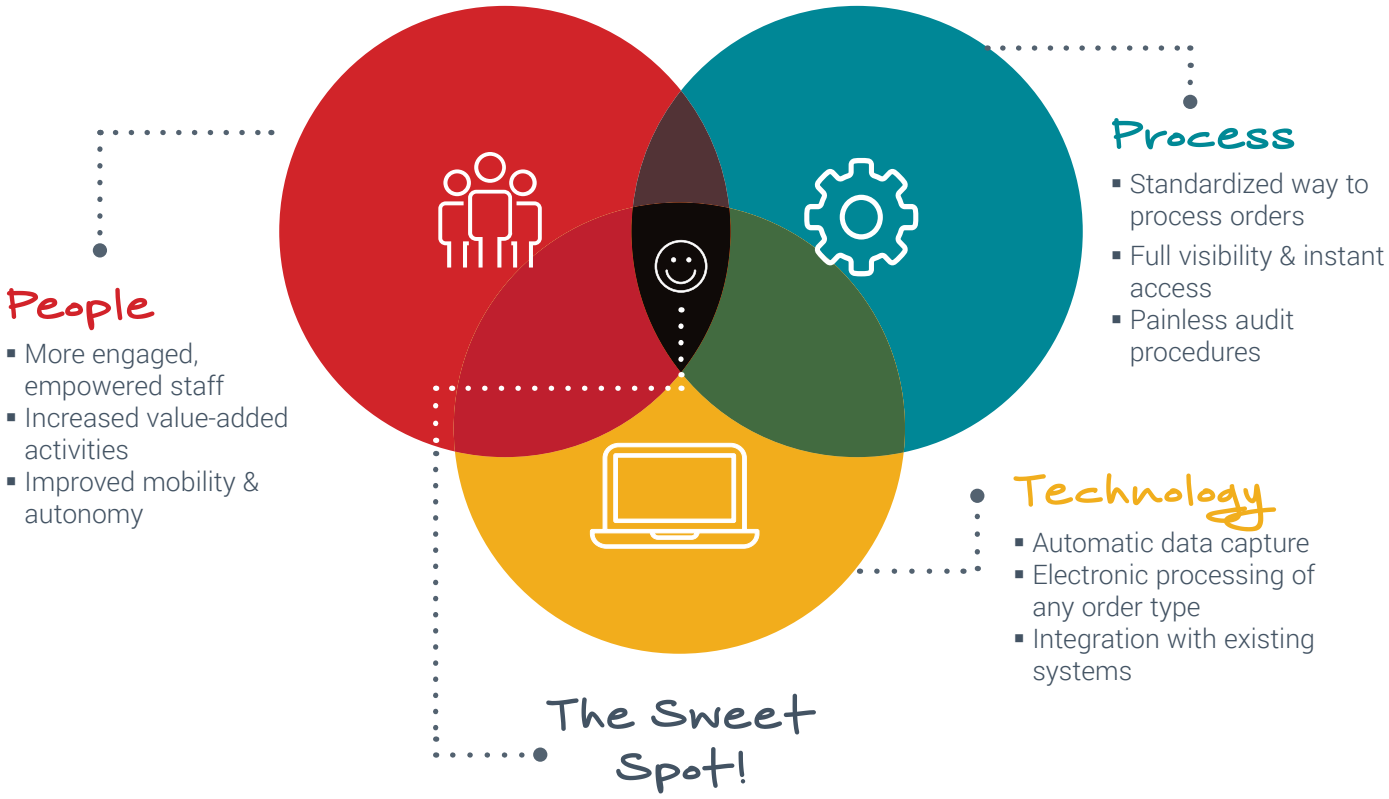
- Downstream supply chain issues
- Negative impact on receivables
- Chaotic IT environment
- Missed same-day shipping
- Increased order backlog, credits, rebilling, etc.

Company

- Poor customer experience scores
- High employee turnover rates
- Damaged reputation and lost business
- Excessive operational costs
- Risk of non-compliance

CUSTOMER SERVICE EXCELLENCE: EASY AS 1-2-3

Feeling hopeless? Cheer up, champ. As this ePaper has shown, the problems may be vast but the solution couldn't be more clear. Order management automation's holistic 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 centralize customer service functions and focus on doing bigger and better things with their most strategic customers.



HI, WE'RE ESKER.

WE DO MORE THAN *TALK* ABOUT AUTOMATION SOLUTIONS.

Esker is proud to offer an Order Processing automation solution specifically designed to help customer service and supply chain leaders achieve their ultimate goal — improving customer experience. But our expertise doesn't stop there. Companies of all sizes and industries use other Esker solutions to drive added value and efficiency in business processes such as accounts receivable, collections management, accounts payable, purchasing and more.

As a worldwide leader in document process automation software, we've been doing our thing for 30+ years now, helping over 11,000 companies around the world in their business improvement efforts. Esker headquarters are in Lyon, France, but we're located just about everywhere that paper needs quitting.



WHO AUTOMATES THEIR ORDERS WITH ESKER?

With three worldwide data centers, 24/7 availability, and a pay-per-use pricing model, companies from all over the world choose Esker for our security, scalability and flexibility in order processing automation. **Some of our satisfied customers include:**

MOEN

GE Healthcare

TERUMO

MSA The Safety Company

BRADY

Whirlpool HOME APPLIANCES Designed to Simplify™

Learn more at esker.com or join the conversation at blog.esker.com.

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INSTANT DOWNLOAD



BUYER'S KIT: ORDER PROCESSING AUTOMATION

A lot goes into making a buying decision on an order processing automation solution for your business. Lucky for you, we put a whole lot into this buyer's kit that'll put your mind at ease. Go on, get in the know.

INSTANT DOWNLOAD

Last chance, fancypants.

If you liked this ePaper, now's the time to share it. Much appreciated! Oh, and sorry for the name-calling — our love of content sharing is hard to contain.



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