



White paper

# The Case for B2B Customer Service Automation

5 tips to win the hearts & minds of  
your company's top  
decision makers



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# What's inside

This white paper aims to empower B2B Customer Service professionals with the knowledge and strategies needed to make the necessary transition to modernization. By better understanding how automation works and the advantages it can harbor, Customer Service professionals can more effectively persuade their organization's c-suite to invest in transformative digital technologies and, ultimately, deliver an improved customer experience (CX) and drive greater value throughout the organization.

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## Highly educational, highly sharable

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



## Introduction

# Setting the stage for change

Automated solutions have long been on the wish lists of B2B Customer Service teams saddled with mundane tasks, error-prone processes and a host of other manual bottlenecks. It wasn't until recently, however, that transformational digital technologies have evolved from a pipedream to what they are today for businesses – an arguable necessity.

But pursuing this type of initiative isn't as easy as choosing a solution and hitting the ground running. The staggering amount of challenges businesses have recently faced (ongoing pandemic, economic instability, inflation, talent migration, etc.) may have raised awareness of Customer Service's importance, but the biggest hurdle – getting buy-in from upper management and other key stakeholders – must still be cleared.

## Why B2B Customer Service automation is worth fighting for

Executives have a broad range of projects and priorities competing for their attention. By crafting a strategic and well-thought-out business case, it will clear up any misconceptions about automation and increase the chances of convincing decision makers that:



### **It's more than a cost saver.**

Automation reduces Customer Service expenses, for sure, but its true impact is far broader – empowering people within the business and facilitating smarter growth strategies.



### **It's not a replacement.**

Good Customer Service is not possible without people. To that end, automation – even when powered by AI – is not meant to replace people but rather, empower them to better serve customers.



### **It's an ideal silo-breaker.**

Customer Service doesn't operate on an island. That's why automation unites the people and processes that have a direct impact on CX, cashflow and working capital.



### **It's too important not to.**

At a time when instability and uncertainty are rampant, flimsy excuses ("We've always done it this way!") to not automate are no longer valid – the stakes are too high.

## Automation's impact

# Processes primed for improvement

Traditionally, Customer Service was seen as a cost center, having little transformational impact on business growth. Since the impact of COVID-19, however, this has radically changed. As organizations continue to rebound from pandemic-driven disruptions and pursue more resilient business practices, B2B Customer Service has become less about transactional problem-solving and more about driving long-term organizational value.

Automation addresses this development rather elegantly by helping businesses improve the “personal touch” within their team of Customer Service Representatives (CSRs), while weeding out the root causes of failure in B2B Customer Service processes such as:

## Customer inquiry management

Acting as a digital assistant for the shared inbox and utilizing generative artificial intelligence (AI) tools such as ChatGPT and natural language processing (NLP), automation within the customer inquiry management process frees up your Customer Service team to address inquiries faster and improve CX by fixing issues such as:

- Lost or deleted emails
- Limited collaboration
- Lack of clarity & context when addressing customer inquiries
- Wasted time & talent by forcing staff to search & sort through shared inbox
- Cost impact of low productivity, higher turnover & customer dissatisfaction



⋮⋮⋮ **“It maybe takes a second or two to validate an inquiry now. The time savings for our CSRs is one of the biggest benefits.”**

Aliza Toor | Customer Service Manager | Palmer Holland

[Read success story](#)

## Order management

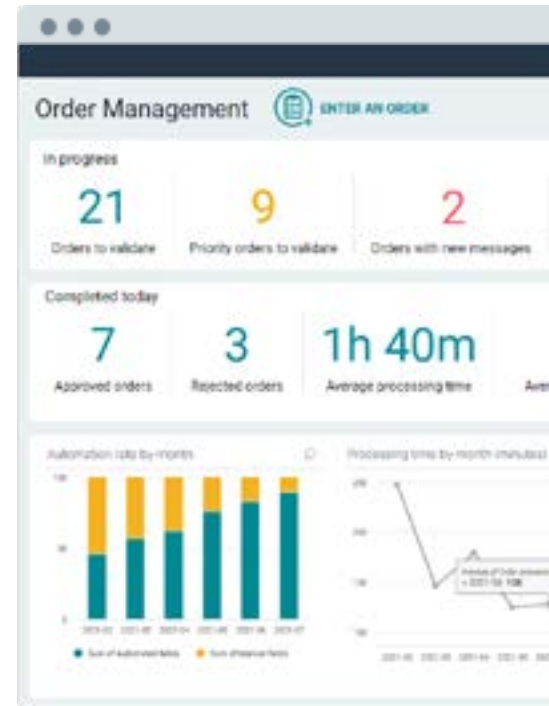
By enabling all incoming customer orders (fax, email, phone, website, portals, EDI, etc.) to be managed in a single, centralized solution, automation creates a value-added ripple effect, addressing common pains like:

- Order processing errors & slowdowns (leading to high DSO & sluggish cashflow)
- Lower levels of team collaboration, productivity & overall morale
- Narrow range of analytics, reporting & audit trail capabilities
- Excess paper, postage, transport & physical archiving expenses
- Increase in disputes & dissatisfied customers

“We’ve cut processing time for repeat orders from 5 minutes to 5 seconds, and our employees feel more empowered than ever.”

Angela Garceau | Sr. Director of Business Operations | NVIDIA

[Read success story](#)



## Customer claims management

Another important duty of Customer Service teams is reducing the number of customer claims – something which AI-driven automation solves by addressing common claims management bottlenecks like:

- Inability to analyze claims by type, date or customer
- Limited collaboration with coworkers from multiple departments on the verification, approval of dispute of claims
- No way to automatically post claims as a credit note or to a G/L account in the ERP

“Automation enables me to see recurring customer claims within a given time period, improving processes every day based on precise metrics.”

Javier Fernandez Linares | Customer Service Manager | Sanofi

[Read success story](#)





## Making your case

# 5 tips to win over top decision makers

From the perspective of executive decision makers, good project investments are the ones that benefit the entire organization — not just a few Customer Service processes. They are acutely aware that the decisions being made now regarding digital transformation will have ramifications for decades to come. If your business case isn't "speaking their language," there's a higher chance it will fall on deaf ears.

So, what areas should B2B Customer Service leaders focus on to demonstrate the end-to-end benefits of automation and win over the hearts and minds of top decision makers?

## Tip No. 1: Make the link between empowered employees & strategic business benefits

Although activities like answering customer inquiries and entering order data into an ERP may seem like benign every-day tasks, they undoubtedly play a huge role in saddling Customer Service teams with errors, slowdowns and productivity losses. Winning over executives requires connecting how issues within the Customer Service team ultimately impact some of the most pressing modern business issues, including:

### Supply chain optimization

With all the ongoing supply chain complexities, executives are eager to optimize whatever internal inefficiencies may be contributing to the problem.

Automation solves this by shoring up one of the first critical steps — the order-taking process — and ensuring that incorrect or incomplete orders are avoided and distribution centers and supply chain staff have visibility into when orders are received, confirmed and shipped. It all equates to a faster, more streamlined supply chain where manual tasks are transformed into value-added activities and employees play a more empowered role.



## AI technologies working behind the scenes

As the driving force behind many automation solutions, AI technology delivers many transformational benefits including:

- **Email triage** is simplified thanks to NLP, which analyzes incoming email inquiries & automatically classifies & routes them to CSRs for further processing.
- **Inquiry response** is made easy thanks to autogenerated email responses — either via predefined templates or using ChatGPT, which can understand and respond to questions in natural and conversational dialogue coupled with sentiment analysis.
- **Intelligent data capture technology** (machine & deep learning) is used to capture data off any incoming order, increasing accuracy over time.
- **Order prioritization** is made easy thanks to urgent orders being identified with data recognition, aiding CSRs in rapid validation.
- **Anomaly detection** tools analyze historical order data & alert CSRs to any order anomalies so they can verify.

## Cashflow improvements

Effective management of cashflow is critical to the survival of today's businesses. This is particularly true for smaller to mid-market size companies that have a smaller margin of error in terms of retaining a strong cash position. Once again, Customer Service plays a critical role in this process even though it may seem to be far removed from the financial side of the business.

Automation enables the cashflow process to be optimized from the very beginning thanks to the centralized nature of the solution and the AI-driven technology working its magic within order management and customer inquiry management. By preventing errors, disputes and dissatisfied customers on the front end, it allows accounts receivable teams to do their jobs better — all of which contribute to getting paid on time.

## Retention & acquisition of talent

Executives understand that you can't be competitive in today's business environment without the ability to retain and attract top talent. They should also be reminded that manual data entry, drawn-out onboarding processes and lack of career-development options are dealbreakers for most workers both inside and outside their organization.



By automating the low-value, menial work out of Customer Service processes, executives can rest easy knowing that new hires don't have to master tribal knowledge or endure weeks of training to contribute — they can hit the ground running and make an immediate impact. Furthermore, employees achieve greater professional fulfillment and career-pathing thanks to their roles being freed up to pursue more value-added tasks.

## Tip No. 2: Focus on the wide-ranging benefits of increased visibility, traceability & flexibility

The increasingly global makeup of today's organizations — often with a myriad of languages, locations, compliance standards, etc. — makes it even more necessary to enable Customer Service teams to not only work more collaboratively with other departments within the order-to-cash (O2C) cycle, but also provide executives with various degrees of visibility to improve long-term decision making and forecasting.

By making intelligent connections between all applications, automation solutions create an environment of end-to-end efficiency. Thus, any solution with the promise of increasing the c-suite's ability to oversee and monitor Customer Service performance (and beyond) is something that will garner their attention.



## Valuable dashboards for every user

Customer Service Management	Sales Reps	Supply Chain	Customers	C-Level Managers	Finance
Inquiries by category	My pricing requests	Availability requests	My open inquiries	Orders by country/division	Open claims
Inquiries by date	My customers' orders by month	Priority orders to validate	My draft orders	Claims by country/division	Credit notes by date
Inquiries by customer	My top 10 customers	Order SLA compliance	My pending orders	Credit notes by country/division	
Orders by reception method		Orders by day of week/month	My order confirmations		
Order automation rate		Open non-trade claims	My shipping notices		
Order validation & processing time			My open claims		
Number of order lines by month			My account statement		

### Customized dashboards & real-time analytics

Much like how statistics can now be used in professional sports to analyze a myriad of metrics to gain a competitive edge, many B2B Customer Service automation solutions feature-packed KPIs and customized dashboards that go beyond simply what inquiries were answered or orders filled. From day-to-day tracking to predictive outcomes, users can remove, edit and add KPIs to their dashboard as they see fit – providing a level of autonomy that's impossible to duplicate in a manual setting.

### Complete audit trail

Customer Service automation solutions also typically house a complete audit trail of every touch point, providing insight into "who did what, when and where," with the ability to monitor whether the proper checks and validations took place. A record of all users' changes is kept so no modifications can be made without leaving a trace. For the c-suite, this provides some much-needed peace of mind regarding regulatory compliance for things like the Sarbanes-Oxley Act, the HIPAA/HITECH Act and more.

### Mobile capabilities

Another value-added feature that's often "baked in" to many automation solutions is mobile functionality. This can include everything from accessing order-related metrics and monitoring performances while on the go, to even being used by field sales teams and customers to place and track orders when out of the office – all operational efficiencies that contribute mightily to the c-suite's goal of optimizing cashflow and facilitating a more flexible workforce.



## Tip No. 3: Reinforce that Customer Service is tied to CX, & CX is critical to business success

Some executives can have a reputation of being rigid when it comes to their organization's customer service and CX, placing undue value on the "personal touch" that defines their issue-resolution techniques. To them, technology like automation (and especially AI) is seen as an impediment to a healthy company-customer relationship. However, it's important to keep in mind that automation is an enhancer of these things, not a replacement or obstacle.

There's a reason that customer-centric strategies are arguably a necessity for today's organizations: A subpar CX has very real implications in terms of retaining customers and competitive advantages. CX is based on customers' interactions with multiple teams in a single organization — any gaps or delays throughout the Customer Service process (and the entire O2C cycle) put that experience at risk.

Automation is intended to fill those gaps that lead to an inadequate CX by providing a cloud-based platform to increase speed, accuracy, transparency, accessibility and collaboration at every touch point in a customer's journey.



## Tip No. 4: Don't neglect the priorities of the IT department

Executives aren't the only ones who need convincing. Undoubtedly, the IT department has its own list of priorities and apprehensions for any new solution that's implemented in the organization. If they are not consulted or their needs are left unaddressed, your Customer Service initiative will fail to gain the traction it needs to move forward.

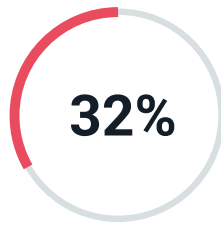
### Leveraging & extending existing systems

The last thing any IT leader or top decision maker wants is for a new solution to disrupt the existing infrastructure in any way. Fortunately, most automation solutions integrate with any ERP and/or CRM system and provide simultaneous integration with multiple applications, simplifying diverse environments resulting from M&A activity.

### Elevating EDI performance

The lives of IT professionals can also be made much easier with a multi-channel cloud automation solution thanks to its ability to elevate EDI from the technical to the business level. By addressing the manual gaps and myriad of inefficiencies often associated with managing EDI orders, the following can be achieved:

- Improved visibility over the entire order flow & human-readable EDI documents
- Added flexibility to existing EDI process by adapting to changes (autolearning of partner and material number mapping, internal & external collaboration, etc.)
- One unified process regardless of order channel (unusual quantity detection, UoM conversion, order splitting based on line item criteria, etc.)
- Instant onboarding for standard EDI formats (EDIFACT, X12, IDOC or UBL XML orders)
- Greater autonomy for CSRs to manage EDI exceptions without the aid of IT



**On average, managing sales orders in an automated system is 32% less expensive than doing so manually.<sup>3</sup>**

## Tip No. 5: Keep the bottom line top-of-mind

Improving company profitability is the end-all be-all for upper management – particularly when the memory of the lockdown (i.e., trying to stay afloat while still paying employees, ordering products and keeping utilities running) is still fresh in so many minds. Therefore, it’s critical to showcase just how impactful a best-in-class Customer Service automation solution can be to an organization’s bottom line.

One impactful way of doing this is by illustrating how the “surface-level” operational benefits (typically prized by Customer Service team members and managers) ultimately equate to more strategic, bottom-line advantages (valued to a greater degree by executives).

- Fewer manual tasks & silos
- Hard & soft cost savings
- Simplified IT environment
- Greater visibility & oversight
- Improved mobility & flexibility



- Staff empowerment & accountability
- Improved customer relationships
- Strengthened global compliance
- Enhanced scalability & market expansion
- New sales & business opportunities



**Higher profitability**

## Conclusion

# Completing your business case checklist

The case for B2B Customer Service automation has arguably never been stronger. But initiating change – particularly in times of uncertainty and instability – can be an uphill battle, as your project is one many vying for approval and budget dollars within the organization. The strategies outlined in this white paper were intended to reinforce the foundation of your automation knowledge and convince key stakeholders to propel your project to the top of their to-do list.

In closing, below are some additional action items recommended before creating your actual business case. Good luck!

## Define your objectives

This can include what type of solution you want to pursue, if you want to automate beyond Customer Service, or listing the concrete issues you wish to address. Be clear and concise and communicate without conjecture or jargon.

## Back it up with data

Customer Service leaders can explain why an automated solution is good for business all day, but upper management is going to need measurable data to justify their decision. An effective strategy is to compare your current Customer Service KPIs to “best-in-class” processes.

## Be predictive

Describe your vision for the future by providing context into what your department could be achieving with automation. This could be everything from how much faster you’ll be processing orders in three months to how your KPIs will improve in three years.

## Consult with stakeholders

Obviously, support from the executive decision makers is the end goal, but Customer Service leaders must also make time to consult with the people and departments directly impacted. This includes CSRs, Sales staff, IT and more.



## What should your business case include?

How your business case for is crafted, packaged and presented is entirely subjective. But when it’s time to move forward on creating it, there are a few essential elements to include, such as:

- Description of your current customer service strategies
- Description of how proposed automation solution will facilitate these strategies
- Expected ROI & project benefits
- Projected timeline, costs & potential risks

# 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, & Madison, WI.



**€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 [Data & Results – Q3 2021: Cost Pressures Mount Amid Widespread Supply Disruption and Labor Shortages](#), October 14, 2021. The CFO Survey.

2 [State of the Connected Customer \(4th Edition\)](#), 2020. Salesforce.

3 [Optimizing the End-to-End Order-to-Cash Process](#), September 29, 2020. APQC. Sponsored by Esker.

