



Ebook

The B2B Order Journey, Reimagined

5 AI-mazing improvements your team & customers will love



About this guidebook

This guidebook is for any B2B Customer Service professional eager for an improved order management operation. In the following pages, you'll learn what a typical B2B order journey looks like in a manual environment, its impact on various stakeholders, and practical use cases for AI-driven automation. Whether you're aiming for operational efficiencies and cost savings or want to better serve your customers or company's cashflow and working capital goals, this guidebook provides valuable insights to reimagine the B2B order journey.

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Introduction

Every day, companies order products and services from other companies. How smoothly these business-to-business (B2B) transactions are handled is largely dependent on the order management (OM) system — that is, all the people, processes and applications involved from the moment an order is placed all the way to its fulfillment, invoicing and beyond.

Unfortunately, creating a seamless B2B customer order journey is easier said than done.

New demands, bigger obstacles

Today's B2B Customer Service teams must contend with a digital commerce landscape in continuous transformation. The B2B customers they serve — well-conditioned by the ease, convenience and personalization found in their day-to-day consumer experiences — now expect the same multichannel engagement on the B2B side of their interactions.

Meeting these new requirements is made even more difficult due to the inherently complex nature of B2B orders, which often involve bulk quantities, customizations, and differing order formats and types. Moreover, the diverse systems with which so many B2B Customer Service teams operate are highly vulnerable to inefficiencies, further complicating the B2B order journey.

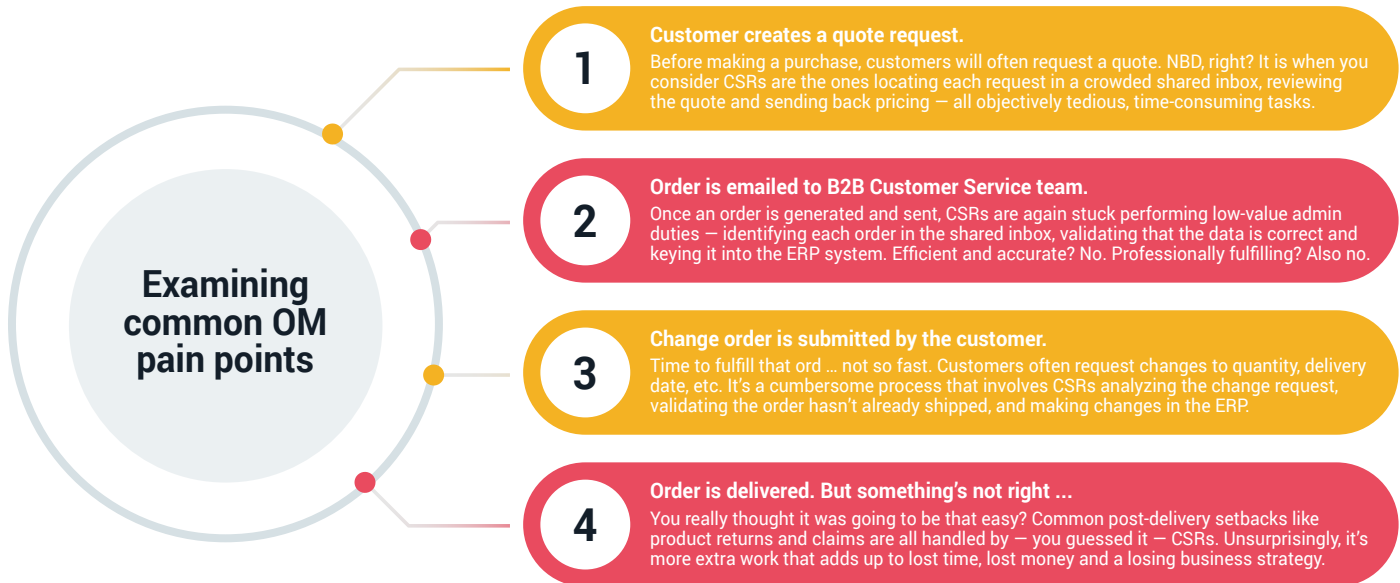
B2B customers regularly use

**10 or more
channels**

to interact with suppliers — doubling the amount used just [five years earlier](#).

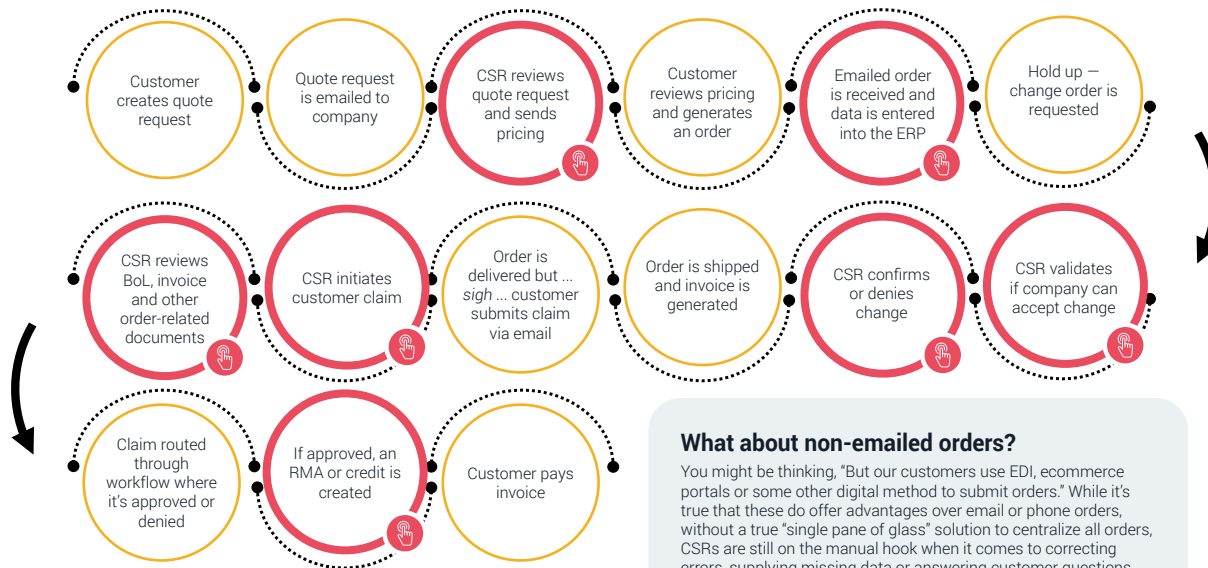
The B2B order journey

On its surface, the OM process is uncomplicated: An order is placed, then processed by a team of Customer Service Reps (CSRs), before being packaged, shipped and delivered to the customer. The real journey, however, is far from smooth sailing — here's why.



Wait ... how many manual touch points?

Below is a more detailed snapshot of the B2B order journey, highlighting instances where manual intervention is required on the part of the CSR. Keep in mind: These activities are often performed with limited visibility into critical order details, customer histories or inventory levels — requiring CSRs to toggle between different screens and applications. In other words, each step is frequently a multi-step process in and of itself.



What about non-emailed orders?

You might be thinking, "But our customers use EDI, ecommerce portals or some other digital method to submit orders." While it's true that these do offer advantages over email or phone orders, without a true "single pane of glass" solution to centralize all orders, CSRs are still on the manual hook when it comes to correcting errors, supplying missing data or answering customer questions.

Who's impacted?

Now that we have a better understanding of where OM pain points originate, let's dive into how they impact stakeholders across the B2B order journey.

Your customers

Customers don't care how it happens, as long as the end result is the same: the right order to the right location at the right time. When that doesn't happen (looking at you, manual OM operation), it results in:



- Delays in order fulfillment and unmet SLAs
- Lack of visibility and transparency into order status
- An inconsistent, frustrating CX
- Erosion of trust with company, increasing the likelihood that someone Easier To Do Business With™ is pursued

Your CSRs

Tedious work. Little recognition. Angry customers. It's easy to see how manual OM processes turn CSRs into the office punching bag. It's also easy to see why top talent are quick to flee for greener pastures when staring down:



- Slower response times due to limited visibility
- Training and knowledge gaps due to the process's rigidity and complexity
- Increased workload and added stress
- Lack of engagement, professional fulfillment and career-pathing opportunities

Team leaders

Managing customer relationships, analyzing data, driving process improvements: If the day-to-day duties of a Customer Service leader are a juggling act, manual OM processes are the blindfold — an unnecessary hindrance that ultimately leads to:



- Increased operational costs
- Inability to identify and drive process improvements due to lack of visibility, time, etc.
- Limited scalability during time of peak order volume
- Difficulties with onboarding, training and monitoring performance of employees
- Lower team morale and higher employee turnover

Office of the CFO

Today's CFOs play a direct role in the success and sustainability of their organization. While OM doesn't technically fall within their strategic financial scope, the outcomes tied to the B2B order journey most certainly do. Here's why the Office of the CFO is no fan of manual OM:



- Negative downstream impacts on cashflow and working capital via fulfillment delays
- Loss of business due to poor CX, fleeing customers, damaged business reputation
- Growth limitations due to the complex, inflexible nature of legacy systems and infrastructure
- **Lack of a real-time, 360-degree view of business due to siloed processes and systems**

46% of CFOs

say accurate forecasting is a significant challenge to [achieving their priorities](#).

Supply chain & logistics

Successfully delivering products to customers requires a high-functioning supply chain and logistics team. Unfortunately, manual OM processes can turn what should be a well-oiled machine into a clunker-of-an-operation, resulting in issues like:



- Delayed shipments because of incorrect or incomplete order impeding order processing speed
- Higher costs due to the added handling, restocking and shipping associated with errors and returns
- Missed opportunities for new sales and creating competitive advantages
- **Lack of visibility into inventory management and other key data, leading to missed customer SLAs, inaccurate demand planning and poor collaboration**



AR team

Despite not being under the OM umbrella, accounts receivable (AR) is very much tied to the B2B order journey. The faster, more accurately orders are processed, the easier it is for AR to bill, collect and recognize revenue. For AR teams, bad OM makes an already hard job harder by:



- Delaying invoicing or causing billing inaccuracies due to order processing errors
- Negatively impacting DSO, cashflow and working capital
- Increasing workload and added stress on AR team members
- Frustrating customers due to invoicing delays or inaccurate billing

“In 2025 and beyond, the ability to effectively harness data will be the cornerstone of successful supply chains.”

[Supplychaindive](https://supplychaindive.com)

The business case for AI assistance

In just the last decade, artificial intelligence (AI) has become increasingly ingrained in our personal lives for everything from online shopping, social media and smart home assistants. More recently, the use of AI has expanded to business functions, with [72% of organizations](#) now using AI in one or more functions — an increase of nearly 30% from just three years prior.

Regardless of an organization's size or industry, AI tools are a natural fit for improving processes such as OM thanks to the speed, accuracy and efficiency they're built to deliver. Here are just some of the ways AI can have a transformational impact on the B2B order journey:



Faster order fulfillment

Incoming order data is automatically identified, classified, extracted and verified — regardless of format or arrival channel.



Improved data integrity

AI eliminates human errors associated with manual data entry while also detecting quantity anomalies, ensuring data integrity.



Better decision-making

Predictive analytics and customer trends drive more informed, responsive decision-making for every stakeholder.



Empowered employees

The less time spent on tedious tasks, the more time CSRs have to focus on upselling, account management and other high-value activities.



Happier customers

When orders are delivered rapidly and accurately, and the CX is consistent and responsive, customer satisfaction increases.



Increased savings & revenue

Greater OM efficiency translates to lower operational costs while CX improvements facilitate future revenue opportunities.

Rethinking common AI misconceptions

Acknowledging the potential risks and limitations of AI is prudent for any business professional. However, sweeping generalizations about AI — both positive and negative — are almost always inaccurate and counterproductive. These commonly include:

"It's just a passing fad."

For better or worse, AI isn't going anywhere. It's even arguable that we've only seen the tip of the AI iceberg. [McKinsey & Company](#) now estimates that, considering how rapidly new AI tech is emerging, half of all work activities could be automated between 2030 and 2060.

"It replaces humans."

While there are situations where AI is used to replace jobs, that is overwhelmingly not the case in OM. Instead, it's a partnership whereby AI acts as digital assistant to maximize the "good" and minimize the "bad" — freeing up people to be more productive and professionally fulfilled.



"It's not worth the ROI."

There was a time when AI was seemingly reserved for big companies with deep pockets. Fortunately, as AI offerings have matured, a rich ecosystem of options are now available to any organization looking to be more competitive without breaking the bank.

"It's not safe or secure."

Data protection is a serious concern in relation to some AI tools. That's why the most trusted solution providers only use AI for targeted, value-added scenarios and host their customer's data in a secure environment — ensuring it will never be saved, used or shared by third parties.

"A standalone AI tool is all we need."

Yes, AI is an exciting, transformational technology, but it's not a magic wand. Many companies jump on the AI bandwagon without realizing that its capabilities can only be maximized when supported by a core OM solution. For example, certain AI chatbots (e.g., GPT-4o) are effective standalone solutions for extracting order data. But how is the data verified? What about exceptions and tracking? Therefore, it's important to recognize AI for what it is: a tool that's most effective as part of a larger OM support system.

5 AI-mazing improvements your team and customers will love

Comprehensive automation solutions take a tactical approach to how AI technology is used in typical OM scenarios and operations. Below are five of the most impactful features sure to bring a smile to the face of even the most job-weary CSRs or disgruntled customers.

1) Intelligent data capture

Different customers mean different order layouts with varied data locations on the page. Rather than simply throwing more CSRs at the problem, AI offers a simple yet sophisticated alternative – intelligent order data capture and triage. Incoming order data is instantly captured and accurately interpreted.

Regardless of channel ...

- Email, phone, fax, EDI
- Ecommerce portal for marketplace
- Mobile app

Regardless of format ...

- Structured XML or EDI
- Semi-structured PDFs
- Unstructured free-text emails

Any corrections made by CSRs are remembered by the solution's algorithms and taken into account during future instances – further improving recognition rates and overall OM speed and accuracy.

The screenshot shows a 'MOTORCYCLE SHOP' order form. It includes fields for 'Ship To' (Motorcycle Shop, Inc.), 'Ship To' (Motorcycle Shop, Inc.), 'Ship To' (Motorcycle Shop, Inc.), and 'Ship To' (Motorcycle Shop, Inc.). The form also contains a table for 'Items' with columns for 'Qty', 'Description', 'Unit Price', and 'Line Total'. The table lists four items: 1. 1400-310 CrossFun / 330 cm3, 2. 1400-100 Deluxe Headlight, 3. 1400-200 Deluxe Taillight, and 4. 1400-400 Motorcycle Helmet. The form is annotated with green checkmarks and orange boxes highlighting specific data points, indicating successful AI capture.

Qty	Description	Unit Price	Line Total
1	1400-310 CrossFun / 330 cm3	680.00	680.00
2	1400-100 Deluxe Headlight	55.00	110.00
2	1400-200 Deluxe Taillight	50.00	100.00
2	1400-400 Motorcycle Helmet	149.00	298.00
1	1400-300 SunFun	325.00	325.00

What types of AI are used?



Deep learning recognition

that extracts data from orders seen for the first time by leveraging a neural network trained on thousands of orders



Machine learning

that automatically and transparently learns from user corrections and improves recognition rates over time



Teaching capabilities

that explicitly define the recognition criteria for specific recurring orders



Natural Language Processing (NLP)

that leverages both generative AI (GenAI) and large language models (LLMs) to understand intent and sentiment, and extract key order data

Applies to semi-structured and structured orders

Applies to free-text orders



“We’ve been able to slash the processing time for repeat orders from five minutes to five seconds, and our employees feel more empowered and productive than ever.”

Angela Garceau, NVIDIA

Sr. Director of Business Operations

2) Automatic order classification

Of course, orders aren't the only request B2B Customer Service teams must contend with on a day-to-day basis. Instead of CSRs searching for needles in the shared inbox haystack, AI-powered solutions do all the heavy lifting for your team — bringing instant clarity to previously time-consuming questions such as:

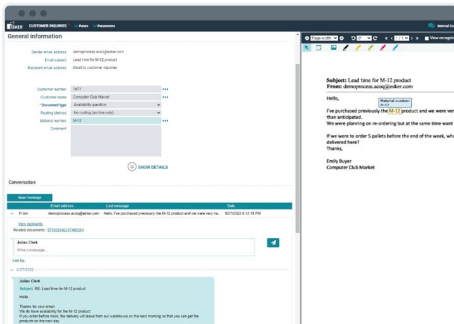
- Is this an order?
- When was it received?
- Am I missing an order?
- What type of order is it?
- Has it already been processed?
- Should this be treated as a “priority” order?

What types of AI are used?



Natural Language Processing (NLP)

that analyzes, understands and derives meaning from written and spoken form; in this instance, automatically identifying and classifying orders in an email flow

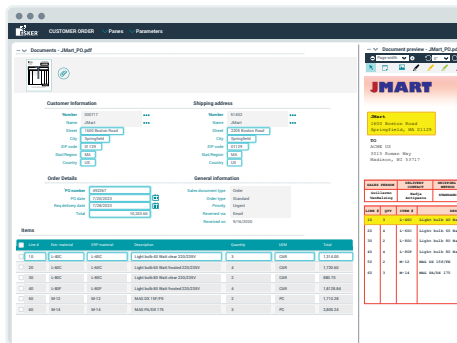
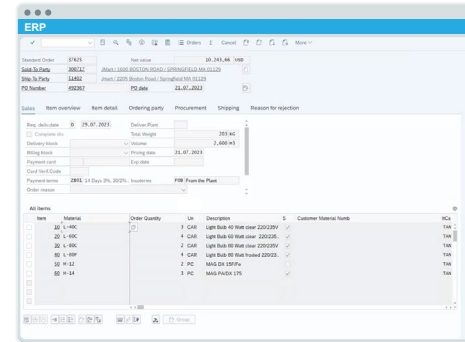


Change orders & return orders

Not only does AI-driven classification separate orders from other B2B customer requests (e.g., inquiries), it drills down even further by distinguishing standard orders from change orders and returns. For CSRs, this means even more time to play the role of “customer concierge” versus OM data scavenger.

3) ERP integration

While ERP integration is not an AI capability, it is an essential element in any AI-driven OM solution. By supporting any ERP when automating the OM process, prices and availability can be easily checked before creating orders in the ERP, while allowing suppliers to deliver order confirmations and ship notices back from the ERP to customers. Long story, short: Orders can be created and processed with the minimal amount of touches when AI is housed within a comprehensive OM solution that plays nice in any ERP environment.



4) Order verification & exceptions management

Sick of the painstaking and time-consuming process of verifying order details? AI-driven automation is the antidote. Assisted and automatic data verification at the header and line-item level allows CSRs to easily review the original order image and extracted order data in a side-by-side view from the solution interface.

The AI technology working behind the scenes also identifies atypical order quantities or amounts for a particular customer based on historical records. These anomalies are then sent to the CSR to verify.

What types of AI are used?

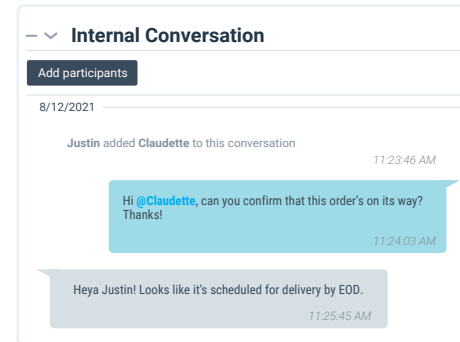


K-Nearest Neighbor (KNN)

that makes predictions determined by how close a data point is to others based on supervised learning algorithm

Confirm or clarify orders in seconds

When orders need to be clarified prior to fulfillment, lack of communication not only wastes the time of CSRs, but also the time of customers and other departments. Here again, AI-driven solutions fill this gap by providing convenient chat tools and tracked conversations that enable real-time collaboration with customers and other team members in sales, logistics, etc. — an essential OM capability that a standalone AI solution can't provide!



- ■ ■ **“It replaces a lot of manual order entry for CSRs, so they’ve been able to get that time back in their day. Now they can just focus on managing the orders in our ERP system instead of validating them.”**

Aiza Toor, Palmer Holland
Customer Service Manager

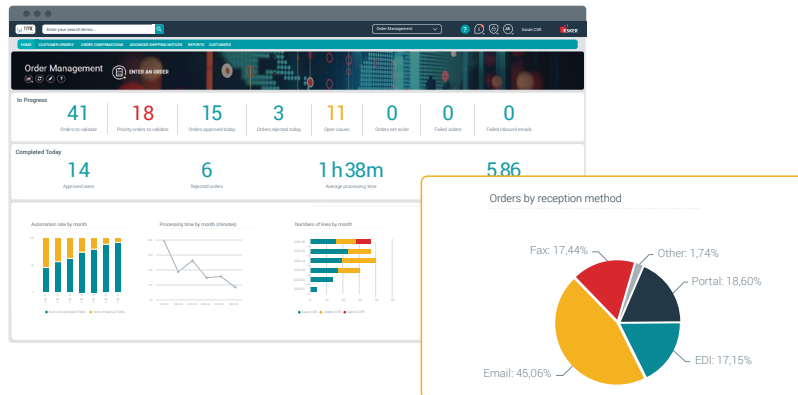
5) 360-degree OM visibility

No, AI is not involved in the real-time visibility provided by automated OM solutions. However, like the aforementioned ERP integration and chat tools, it's yet another essential feature only found in a core OM solution capable of transforming the end-to-end B2B order journey.

Your B2B Customer Service team is never more than a click away from accessing powerful analytics to accurately perform critical tasks thanks to features such as:

- **Customizable dashboards** featuring real-time metrics, performance trends and items analytics
- **Audit trail** of every OM touch point, ensuring full transparency and accountability

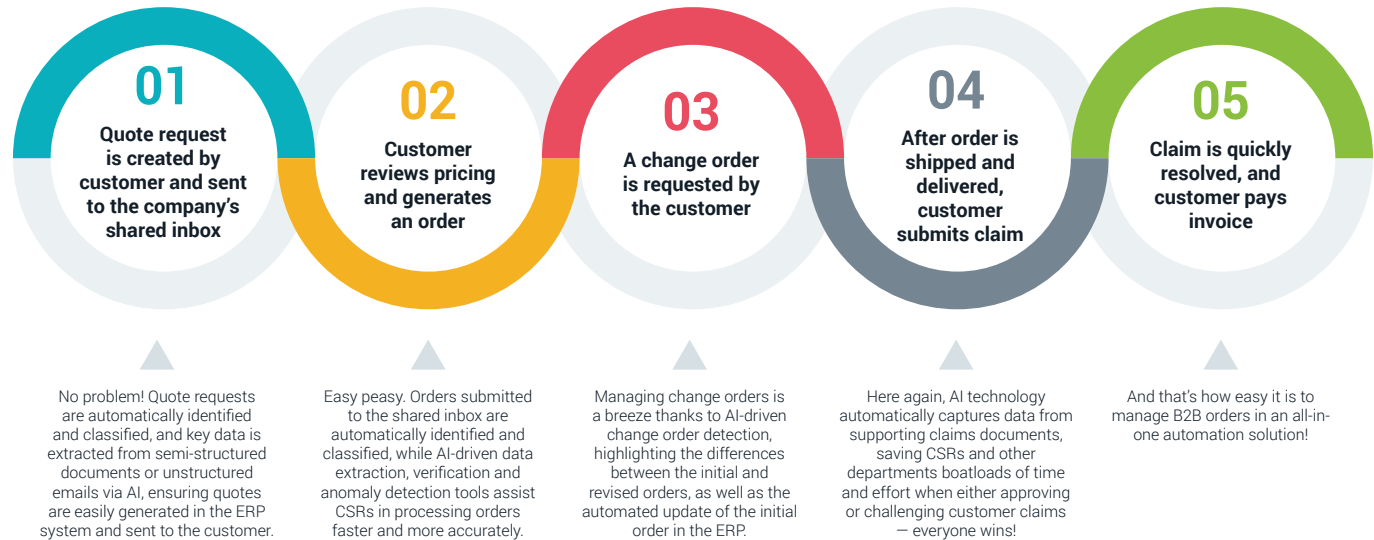
This single “pane of glass” to monitor the complete order lifecycle not only ensures efficiency and transparency within your current process but opens the door for continuous improvement opportunities as your team and company evolve.



The B2B order journey, reimagined

Remember all the manual touch points outlined on Pages 4-5? Below is what that repetitive, laborious and endlessly frustrating B2B order journey can look like using one integrated, AI-driven solution. Orders are centralized, workflow is streamlined, visibility is ensured, and everyone impacted — from CSRs and managers to your CFO and customers — can go about their day with more clarity, continuity and confidence.

An all-in-one OM automation solution



Conclusion

The OM process is more than just another backend operation: It's arguably the backbone of B2B transactions, supporting operational efficiency, customer satisfaction and even financial performance. Businesses that effectively harness the power of AI technologies and the core OM solutions that support them are rewarded with a B2B order journey that contains:



Fewer delays across essential business operations



Improved CX and loyalty thanks to "on time, in full" order delivery



Reduced operational costs along with effective resource allocation



Enhanced order processing efficiency



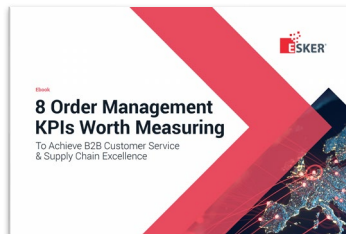
Faster, less contentious issue resolution



Better decision-making and data analysis

Want to learn more?

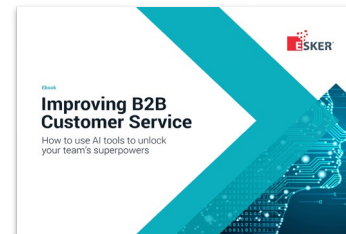
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Hi, we're Esker

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 optimize 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



1,000+

employees serving
850k+ users &
2,500+ 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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