



Bringing Smiles to Customers & Employees by Digitally Transforming Customer Service

By automating order and deduction management with Esker, Risi increased efficiency and added value to its Customer Service process.



At a glance

Risi Group



Snack foods producer



1,300 orders per month from 200 customers



13% annual growth



SAP Business One® (ERP)



“In just a short time, Esker has allowed us to automate all incoming orders and delivery notes, thereby enabling our CSRs to focus on tasks that add greater value. This constitutes a critical step in our process automation strategy.”

Javier Paniagua

Technology and Project Director, Risi

Challenges

Multiple channels & poor print quality hamper efficient order processing

Risi is Spain's second largest producer of snacks, crisps, biscuits and sweets. The company was founded over 50 years ago in Torrejón de Ardoz, and today has multiple production centers near Madrid and Seville. With nearly 13% annual growth, Risi needed to improve its internal process efficiency to seize competitive advantages.

Process automation had the potential to enhance the customer experience (CX) while enabling the Customer Service team to focus resources on higher-value tasks. Seeking a solution that would improve the experience for both customers and employees, Risi decided to revamp its Customer Service department in a two-phased approach. First, it would revamp its order management and delivery note process, and second, its deductions management process.

Phase 1: Order & delivery note management

Every month, Risi's Customer Service (CS) team receives 1,300 orders, coming in over a variety of channels that include email, fax and EDI. The orders and delivery notes from distributors were often hard to read, making it difficult to correctly capture data and thereby causing shipment errors and delays.

“The biggest challenge was the poor print quality of some delivery notes,” said Jorge Calvo Gutiérrez, Customer Service Director at Risi. “Working with Esker allowed us to improve several aspects of the process, one of which was how we receive communications from our main customers and partners.”

Objectives



Reduce errors by eliminating manual entry



Expedite order & delivery note processing



Gain visibility into history & real-time process stages

Impact

- 🕒 Reduced order processing time by 80%
- ⊗ Eliminated manual data entry errors
- 🔗 Created visibility into workflow stages
- 👥 Enhanced company-wide information exchange
- 😊 Improved employee well-being
- ✅ Improved customer satisfaction



Results

Improved visibility leads to faster order fulfillment & happier customers

Once Esker's solution was up and running, Risi was able to observe immediate and positive impacts. Most notably, day-to-day operations were simplified, resulting in content employees and pleased customers: "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," said Gutiérrez.

With the AI-based solution now automatically and correctly capturing the incoming data, order handling time has significantly decreased, from an average of 10 minutes per order to just under 2 minutes. Gutiérrez went on to explain that it is also very convenient for the team to have orders in all formats, including EDI, visible in a single dashboard, which provides them with an overview of all incoming data in real time.

Enabling in-depth analysis with dashboards not only optimizes the internal processes for the whole department, but provides company-wide visibility as well. Pertinent data can be easily exported to the corporate business intelligence system, a center of communication for sharing strategic information with company management. Internal visibility, routing control and the possibility of reporting key trends with management are the most remarkable benefits that Risi highlights when reflecting on the impacts of the new processes. Given the great results obtained for both customers and employees, Risi moved forward with the second phase to automate deductions.

“Our customers are satisfied, too, as lead times are shorter and reliability is increased.”

Jorge Calvo Gutiérrez
Customer Service Director, Risi

Phase 2: Deductions management

Challenges

Creating an efficient & streamlined deductions process

After successfully implementing Esker Order Management, Risi wanted to further improve its sales cycle processes. So, in early 2022, the company decided to automate the trade deduction process to address mismatches and short payments occurring in customer accounts. According to Risi's estimation, around 5,500 debit notes supporting deduction claims are received each year in different formats, including postal mail, email and EDI. These are processed by only three CSRs. A new back-office team was created for verification and categorization prior to sales approval.

Solution

Streamlining workflow & enhancing visibility





Risi particularly appreciated the functionality in Esker Claims & Deductions that links the short payments and accounting entries with the supporting document in SAP. Deductions are sorted into two categories: trade claims associated to promotions and rebates, and non-trade claims such as price or quantity differences. These are then assigned to the right person for approval and ERP integration. As with orders, Esker dashboards allow users to view the deduction claims and track their progress in real time.


Results

Cutting costs & boosting supply chain efficiency

Risi has gained full visibility on all types of deduction claims and is able to easily ask the Sales team for approvals. Being able to dispute deduction claims with customers has had a noticeable impact on company costs, reduced inefficiencies and has contributed to decreased stress in the supply chain.

Impact

-  Full visibility over deduction claim types
-  Redirection of claims for deduction approval
-  Claim dispute option has positive impact on costs
-  Decreased stress on the supply chain

 **“Thanks to Esker, every Sales rep has their own report of what’s come through, the type of deduction and what’s been approved. We now have the ability to sort, manage, and, if necessary, dispute all deduction claims, which has had a very positive financial impact.”**

Javier Paniagua,
Technology and Project Director, Risi

Make Esker an ingredient in your company's success!

Get in touch with Esker

About Esker

Esker is a global cloud platform built to unlock strategic value for Finance, Procurement and Customer Service professionals, and strengthen collaboration between companies by automating the cash conversion cycle. Founded in 1985, Esker operates in North America, Latin America, Europe and Asia Pacific with global headquarters in Lyon, France, and U.S. headquarters in Madison, Wisconsin. Our customers use our cloud solutions to increase the efficiency, productivity and visibility of their source-to-pay (S2P) and order-to-cash (O2C) processes.

