



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 organization'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 precise¹ – 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 center 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 & personalization

Over 60% of customers would defect to a competitor after just one bad experience.⁵ Knowing this, many businesses are centralizing communications so that convenient and personalized 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 "organization" 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.

Bobby Newport	5	PURCHASEORDERPRO... Re: Missing Juice Box - Foun
(!) Chidi Anagonye	543	PhilosophersWeekly FW: [External] - I don't know
Jessica Day	13	Ecomm Z: Other/ ... /Confirmation
Theodore Lasso	29	blv Re: What Does a British Owl
Donna Meagle	50	HelpDesk _/CUSTOMER EXAMPLE
Jason Mendoza	2	BGCWC PO 78032806301
Tahani Al-Jamil	94	Palace Rentals Re: URGENT - Need your fee
(!) Leslie Knope	11,820	Dept. PLEASE RESPOND
Dwight K. Schrute	5,334	BrsBtsBtlstrG 06-12-22 order for GB (30 ct
David Rose	78	Mall Pretz Re: I will not feel shame
Janine Teagues	21	AE edu PO 9790861410
Bob Vance	46	vrf FW [External] - Requesting r
(!) Leslie Knope	937	PIT URGENT - Chard is out of co
Dani Rojas	122	Life, Ftbl Re: PO 1425262
Elizabeth Lemon	904	Chise, Knight TGS PO 2034
Lucille Bluth	7	lbfoundation Re: Banana Prices
Stanley Hudson	9,563	Day, Pretz _/POC - Dropship
Leslie Knope	4,885	Wfls Re: Meeting with Head of Fir

Benefits of a digital assistant

Customer inquiry management automation is the perfect complement for Customer Service teams transitioning from cost center to value center. 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)



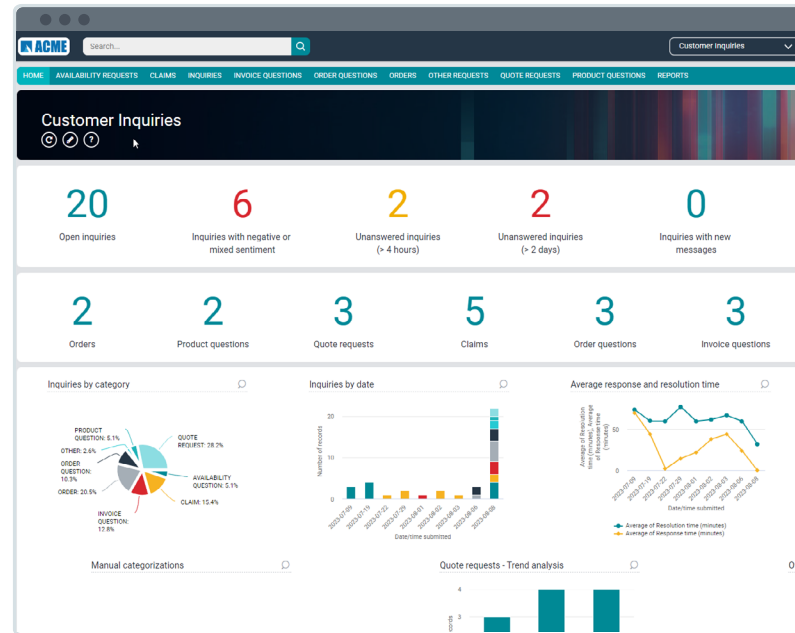
Reduce stress by enabling any CSR to handle any request



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 centralizing 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



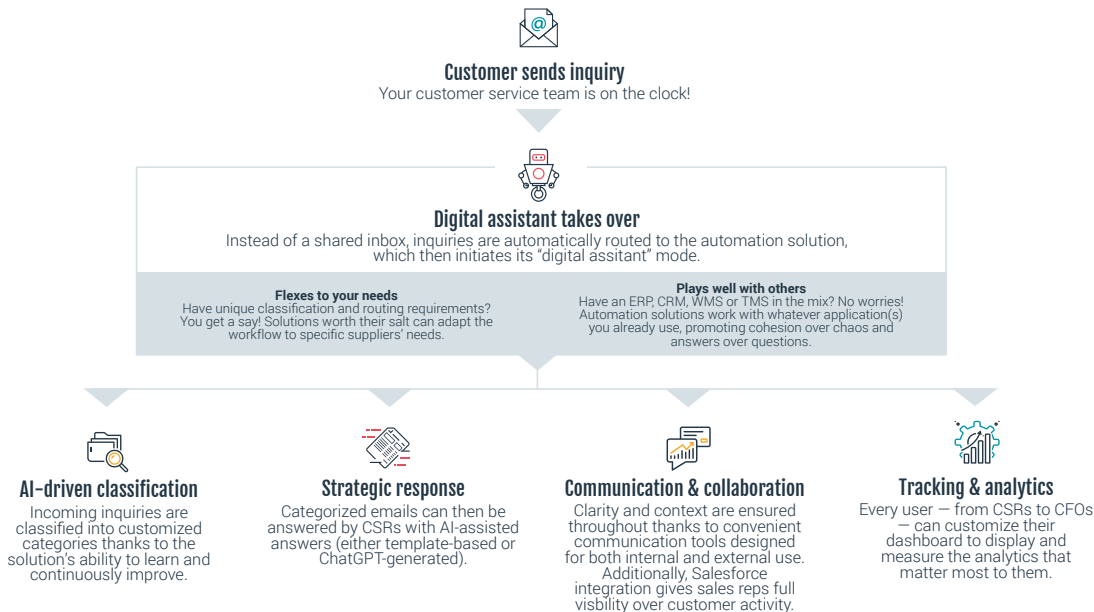
2.4x

**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:



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 analyze 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 prioritize 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.

General information

Sender email address: dtarg@westeros.com
Email subject: New Order

Customer number: 3950
Customer name: Matter Transport
*Document type: Order
Routing methods: Order Management application
Target configuration: SOP - Default
Comment

Customer history

Date received	Document type	Email subject
7/26/2021 4:27:38 PM	Claim	Claim - Missing Items
7/26/2021 4:25:36 PM	Order question	Status Request - PO MT67920
6/18/2021 11:32:49 AM	Order	[MT][ORDER] please proceed with this order

Document preview - 90_GB_FL01.pdf - 1/1

Invoice

Matter Transport
10 North Lake Avenue
Bairdford, PA 15006
1-800-555-2543

Invoice Number: 143901
Invoice Date: 8/4/2021
Currency: USD

Item	Ref	Description	Quantity	Unit Price
10	T-20300	Generator	1.00 pc	76,693.80
SUBTOTAL				
TAX AMOUNT (19%)				
AMOUNT DUE				

Strategic response

Categorizing 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 analyzes 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.

The screenshot displays a customer service interface with a dark header bar containing navigation links: HOME, CUSTOMER INQUIRIES, Pages, and Parameters. On the right side of the header are links for Home, Contact, Log Out, and Help. The main content area is divided into two panels. The left panel, titled 'General information', contains a table with customer details: Customer number (3950), Customer name (JMart), Document type (Order question), Routing method (No routing (archive only)), Order number (483451), Carrier name (UPS), Shipping date (6/10/2023), Estimated delivery date (6/4/2023), Tracking number (1209777103), and Overall sentiment (Neutral). The right panel, titled 'Order Status Request - JMart', shows the email header: From: Wilson, To: samira@ACME.com. Below the header is a 'Hello!' greeting and a message: 'Do you have a status on my order? It should be arriving soon. PO# 483451'. The signature block reads: 'Thanks, Wilson, Procurement specialist' followed by the JMART logo. At the bottom of the right panel is a 'Suggested reply generated with ChatGPT. Please ensure that it is accurate.' notice, with 'Send' and 'Edit' buttons. Below this is the email body text: 'Dear Wilson, Thank you for contacting us regarding your order with Sales Order Number 483451. We are happy to assist you with the status of your order. Based on our records, the expected delivery date for your order is June 17th, 2023. ...see more'. At the very bottom of the interface is a row of buttons: Send, Reject, Get advice, Save, Quit, and Save and quit.

General information	
Customer number	3950
Customer name	JMart
Document type	Order question
Routing method	No routing (archive only)
Order number	483451
Carrier name	UPS
Shipping date	6/10/2023
Estimated delivery date	6/4/2023
Tracking number	1209777103
Overall sentiment	Neutral

Order Status Request - JMart

From: Wilson
To: samira@ACME.com

Hello!

Do you have a status on my order? It should be arriving soon. PO# 483451

Thanks,
Wilson
Procurement specialist

JMART

Suggested reply generated with ChatGPT. Please ensure that it is accurate.

Send **Edit**

samira@ACME.com

Dear Wilson,

Thank you for contacting us regarding your order with Sales Order Number 483451. We are happy to assist you with the status of your order. Based on our records, the expected delivery date for your order is June 17th, 2023. ...see more

Send **Reject** **Get advice** **Save** **Quit** **Save and quit**



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 personalized 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.

The screenshot displays a web application interface for a customer portal. The main content is divided into two sections: 'Advanced Shipping Notice' on the left and 'Document preview' on the right.

Advanced Shipping Notice

Order Details

- PO number: 470721
- PO date: 8/4/2021
- Sales order number: 470721
- [View order](#)

Shipping Information

- Delivery note number: 7836437247832
- Shipping date: 8/8/2021
- Estimated delivery date: 8/12/2021

Tracking Information

- Carrier name: FedEx
- Carrier account number: 69579
- Tracking number: 4790181
- [Track shipment](#)

Document preview - 90_GB_FL01.pdf - 1/1

Invoice **ADVANCED SHIPPING NOTICE**

Matter Transport
10 North Lake Avenue
Baird, PA 15006
1-800-555-2543

Ship-to number: 51402
JMart
2205 Boston Rd
Westeros
Phone: 555-5555

PO number: 470721
PO date: 8/4/2021
Sales order number: 470721

Item	Ref	Description	Quantity	Unit Price	Amount
10	T-20300	Generator	1.00 pc	76,693.80	76,693.80
SUBTOTAL					76,693.80
TAX AMOUNT (4.0%)					3,067.75
					14,761.55

[Quit](#)

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.

– ▾

Internal Conversation

Add participants

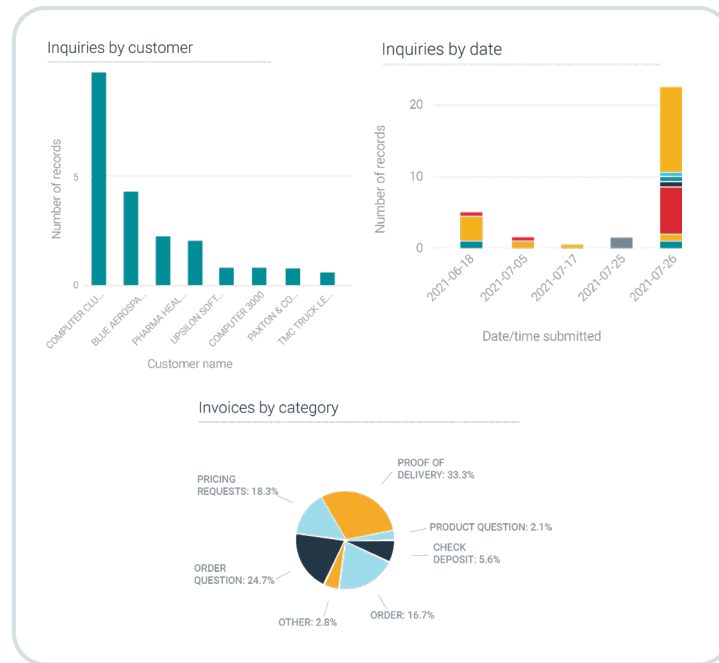
4/14/2022

Julian Clerk added Alex CSR manager to this conversation11:23:46 AM

Hi @Alex CSR manager, can you confirm that we have availability for this customer request? Thanks!
✓11:24:03 AM

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 prioritizing 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 prioritize?" "Is that CSR really that busy?" Users can customize 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 analyzing 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.



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.



References

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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, & 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.

