TOP 5 PRACTICES
TO OPTIMISE CUSTOMER ORDER PROCESSING

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Let's get straight to the point: A company's success begins and ends with its customers. And one of the most important components of customer satisfaction is the effectiveness and efficiency of business document processing. Today more than ever, optimising business processes within the order-to-cash cycle is central to improving overall performance and gaining a competitive edge.

This may seem obvious, however, it's still one of the most overlooked facets of business process improvement. In the order-to-cash process, customer order management is a key step. An order entered accurately and within the promised time means a satisfied customer who will pay their invoice on time.

Here are the top five practices to optimise order processing and improve customer satisfaction:

1. Simplify, track and measure.

Some orders arrive by fax, email, telephone or even EDI, while others may be received in duplicates from two different channels. This is often the complex reality that a company faces in a traditional customer order-taking process.

Since these are mixed media, independent of one another, there is no way to provide for a global view of the quality of service rendered. For example, an inquiring customer may call to find out the status of an order, or, the Financial Director may want to know how many remaining documents need to be processed before the end of the day. Unfortunately, these questions cannot be answered when the orders are on a fax machine somewhere, buried in an email inbox or in a mail basket waiting to be sorted.

Situations such as these are made all the more harmful because they are typically invisible to strategic analyses that could help improve day-to-day operations. Day in and day out, lack of workflow visibility affects customer satisfaction, service productivity and, ultimately, the overall performance of the company.

To improve, one must measure. To measure, one must organise. Faced with multiple channels for receiving orders, the first key to effective order taking is to consolidate all incoming documents into a single solution, thereby providing full visibility and traceability into every order received, including its real-time status and overall history in the company's processes.
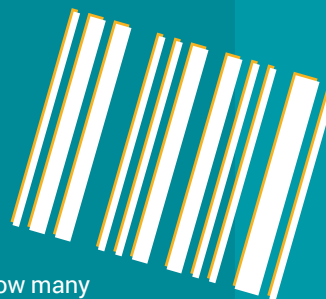
2. Send the right order to the right person.

For purposes of productivity and business knowledge, customer service or sales administration departments are often organised by geographical area, product line, market or a combination of these. This is especially the case when a company operates with a shared services centre.

Considerable time can be saved by simply sending an order to the right person to process it. Sorting, mail baskets, and distribution from one department to another, or from one floor or site to another may lead to errors, losses, delays, and a total lack of visibility and traceability.

These types of unproductive tasks often go unrecognised or ignored, even though they can be solved with relative ease. Automating customer order processing allows the right order to be sent to the right person or department without any manual processing. This is accomplished using predefined criteria identified when the order is received, which frees up time to better serve customers!

3. Control risks and eliminate tasks that provide little added value.

For orders that are not transmitted as data files, entering the order in the ERP system is a common — yet often troublesome — step.

Who would claim that entering data into a system is a high value-added task? However, even the **slightest error** (and there are always some) can have undesired consequences. Manufacturing eight tons of tiles and shipping them across the country, only to find out that the colour is wrong, is disastrous in terms of customer service (not to mention wasted resources). It's no better if the delivery date is off or if the address is wrong.

Automating the process makes order entry secure and prevents errors by guiding the user with automatic input, performing real-time data consistency checks, supporting access to ERP resources and integrating with the ERP to manage alerts. Teams can focus on high value-added tasks to verify the accuracy of order data or more effectively manage their customer relationships.

4. Proactively communicate with customers.

An incorrect order that is entered correctly remains incorrect and will still be delivered with the wrong products or volumes. Therefore, it is essential to reinvest saved time into verifying the accuracy of the customer's order. This means communicating directly with the customer to clarify the order or to adjust it so it meets the actual need.

Automating the process of handling customer orders increases a company's ability to satisfy its customers and directly boosts sales.

5. Measure the results and continuously optimise the process.

Warning signs that the order taking process isn't functioning properly include: late orders, orders that fail to comply with time commitments, low team productivity, trouble handling unexpected volumes and recurring problems. Automating the process is only the first step of improvement. Optimisation comes by measuring results, analysing them and developing an ongoing action plan.

The ideal performance measurement tool would be one that's based on a consistent and consolidated process shared between various stakeholders. Additionally, the solution would make it easy to access and view real-time key performance indicators within the customer order process.

Do any of these five points sound familiar? Then, what are you waiting for? Analyse your order taking process, and you are bound to discover a potential source of productivity and customer satisfaction.

About Esker

Esker is a worldwide leader in document process automation, helping organisations of all sizes Quit Paper™ and streamline their inbound and outbound communications with cloud-based automation solutions.

Founded in 1985 with 80,000+ customers and millions of licensed users, Esker operates on a worldwide scale with global headquarters in Lyon, France, and U.S. headquarters in Madison, Wisconsin.