

# TRANSFORM CUSTOMER SERVICE AND OPERATIONS THROUGH ORDER AUTOMATION


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# TABLE OF CONTENTS

- 3 [Project Personnel and Copyright](#)
  - 5 [Leverage Automation to Improve Order Processing Efficiency](#)
  - 11 [Recognize the Benefits of Automation on Customer Service and Operations](#)
  - 16 [Anticipate Results for Digitally Transforming Order Processing](#)
  - 17 [Sponsor's Perspective: Esker Inc.](#)
  - 18 [Endnotes](#)
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# PROJECT PERSONNEL AND COPYRIGHT

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Great customer service hinges on efficient order fulfillment — especially the initial processing of a customer’s order. With thousands of sales orders coming into most large organizations monthly, this mission-critical process can demand a significant portion of customer service representatives’ (CSRs’) time and attention in the quest for near-perfect input accuracy and order fulfillment. But such intensive personnel support isn’t necessary for effective order processing. Great customer service doesn’t have to be cumbersome. Sales order automation can transform customer service and operations which provide quantifiable benefits to the organization.

The potential organizational drain from order processing is considerable. For organizations with a high volume of orders, the effort to get it right the first time can be immense. For others, increasingly rapid fulfillment cycle times still involve repetitive manual processes with significant data entry and exception management. Disruptions can occur from unique customer requirements, manual handoffs, input errors, varying order channels (email, phone, online, etc.), no integration with existing internal systems, and a lack of visibility into the end-to-end process. These issues can hurt customer service in terms of issue resolution, processing costs, internal coordination, and fulfillment cycle times. Order input errors are especially vexing for many organizations.

Such traditional order management concerns are being addressed with automation. Although many organizations use electronic data interchange (EDI) to help process sales orders, EDI can pose problems in processing and locating order exceptions. And enterprise resource planning (ERP) systems have limited inroads beyond inventory control, manufacturing, and shipping. There’s a need for sales order-specific automation.

#### **Automation provides an opportunity to improve order management by:**

- // reducing error rates,
- // decreasing costs per order,
- // increasing customer satisfaction,
- // improving process transparency from receipt to archival,
- // accelerating the order-to-cash cycle,
- // prioritizing specific orders,
- // reducing reshipping and inventory problems,
- // integrating with existing systems, and
- // increasing processing capacity.



This white paper shares real-world examples and research from [APQC’s Open Standards Benchmarking](#) database to reveal how digitally transforming order processing empowers successful customer service and order fulfillment.

# LEVERAGE AUTOMATION TO IMPROVE ORDER PROCESSING EFFICIENCY


APQC has found a distinct competitive advantage among organizations with automated order management systems when benchmarking their performance against organizations that have not automated order processing. There are performance differences in multiple areas, including: first-time data accuracy, the impact of sales orders requiring no human intervention, the effect of orders and inquiries coming through new channels, the use of commercial systems vs. systems developed in-house, and bottom-line organizational success.

## TARGET FIRST-TIME DATA ACCURACY FOR SALES ORDERS

Whenever a largely manual process is automated, improved accuracy can be expected. First-time data accuracy is especially important for an effective order fulfillment system, which typically provides standard forms, drop-down menus, and preset order numbers to minimize input errors. In addition to preventing keying and matching errors, automation can also prevent lost and misfiled documents. Other order processing errors greatly reduced by automation include overpayment, late payment, lost early payment discounts, and duplicate payments<sup>1</sup>.

APQC has evaluated the impact of measuring, tracking, and rewarding first-time data accuracy for quotes and order management. Organizations that engage in this practice are 2.8 times more likely to find order management extremely effective at improving order fill rates and on-time delivery compared to those that don't measure, track, and reward first-time data accuracy. In addition, organizations that focus on first-time data accuracy achieve:

- // faster order cycle time,
- // higher perfect order performance,
- // lower average cost per sales order for orders received through new channels (i.e., digital channels),
- // lower average cost per sales order for orders received through traditional channels, and
- // a higher percentage of active customers that are profitable.



**APQC has found a distinct competitive advantage among organizations with automated order management systems.**

Figure 1 shows the difference in performance at the median (or middle point) for these Key Performance Indicators (KPIs) based on whether an organization measures, tracks, and rewards first-time data accuracy.

Impact of Focus on First-time Data Accuracy

Impact of Focus on First-Time Data Accuracy	Yes, Organization Focus		No, Not Organization Focus	
	MEDIAN VALUE	SAMPLE SIZE	MEDIAN VALUE	SAMPLE SIZE
Customer order cycle time in days	<b>2.0</b>	184	<b>9.5</b>	48
Perfect order performance	<b>98</b>	188	<b>86</b>	52
Average cost per sales order for orders received through new channels	<b>\$3.10</b>	191	<b>\$5.10</b>	52
Average cost per sales order for orders received through traditional channels	<b>\$10.00</b>	191	<b>\$16.50</b>	53
Percentage of active customers that are profitable	<b>98%</b>	183	<b>79%</b>	47

(Figure 1)



Real-world examples drive home these performance gaps. For example<sup>ii</sup>, after focusing on first-time data accuracy, MEDRAD Inc. decreased the percentage of order entry errors from 1.6 percent to less than 0.4 percent. And Kimball International maintained a consistent order entry accuracy rate of 99.6 percent.

# CAPTURE THE BENEFITS OF SALES ORDERS REQUIRING NO HUMAN INTERVENTION

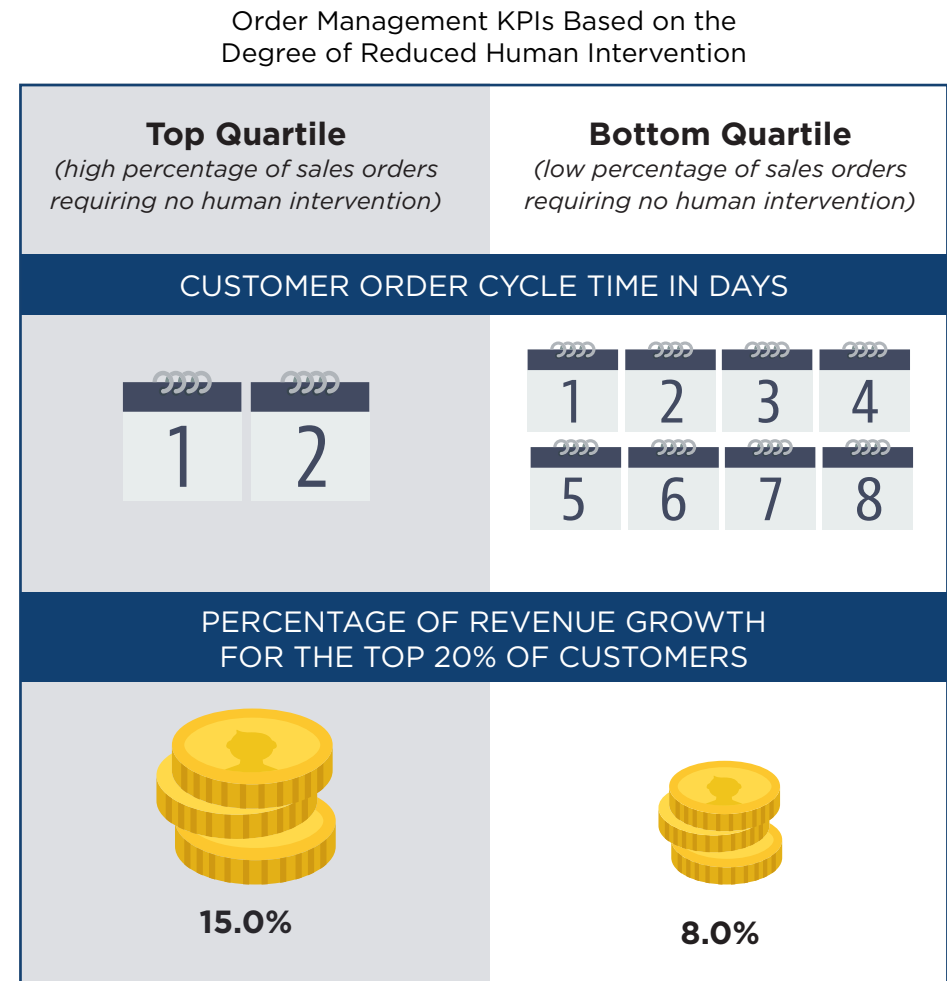
Automation can provide end-to-end process improvements in efficiency, integration, and accuracy. This success not only reverberates with customer service but also with partnering functions such as logistics and production planning. APQC's research indicates that the ability to create, modify, and fulfill sales orders without human intervention improves the most relevant KPIs across order management.

Organizations with automated systems have higher perfect order performance, meaning they satisfy customers by shipping more orders that are complete, on time, damage free, and delivered with correct documentation. The degree of automation correlates with the degree of improvement in perfect order performance. Organizations with a higher percentage of sales orders requiring no human intervention to create, modify, or fulfill (e.g., those in the top quartile) have a significantly higher perfect order performance than those in the bottom quartile. Top quartile organizations score a perfect order performance of 96, while the bottom quartile reaches only 90.

In addition, organizations that minimize human intervention in the sales order process to a greater extent find their automated order management systems more effective across multiple dimensions:

- // improving order fill rates and on-time delivery;
- // improving customer satisfaction and retention;
- // reducing personnel costs and overhead for entering, processing, and tracking orders;
- // improving employee retention;
- // reducing the cycle time from initial receipt until orders are received (by customer); and
- // reducing the monetary value of returns caused by errors in order fulfillment (e.g., incorrect shipments and order-entry errors).

Figure 2 highlights the gap in performance on two KPIs based on the degree to which organizations have removed human intervention in sales order processing.

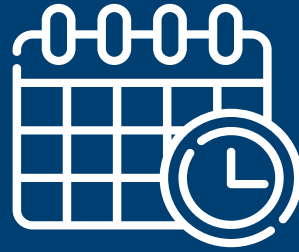


(Figure 2)

At R&D and pharmaceutical company Accord Healthcare<sup>iii</sup>, automating its order processing improved performance on several key terms:



**REDUCED ORDER  
PROCESSING TIME FROM  
3 MINUTES TO 33 SECONDS**



**190 HOURS SAVED EACH  
MONTH FOR TEAMS OF CSRS**



**100% OF ORDERS  
PROCESSED AND ARCHIVED  
ELECTRONICALLY, INCLUDING  
EDI ORDERS**

These improvements were experienced through a moderate degree of automation, with 64.7 percent of orders automated without manual intervention. In addition to these KPIs, Accord Healthcare also was able to reduce reliance on IT to resolve EDI issues, achieved faster onboarding of EDI customers, and increased its touchless rate of EDI orders by 7.6 percent in two months — all through its automated order processing solution.

In another example, global food distributor SanLucar<sup>iv</sup> needed to hasten its order fulfillment process. Its largely manual process was automated, including order capture, data capture and validation, language translation, partner fulfillment load balancing, and document storage. In eliminating manual interventions, the organization experienced 84 percent faster order processing times (and freed two staff members from manual order entry).

## FOCUS ON RECEIVING ORDERS AND INQUIRIES THROUGH NEW CHANNELS

Organizations with the highest percentage of orders and inquiries coming through new channels (e.g., a cloud-based service or other digital channel) find their order management systems to be extremely effective in reducing order cycle time, improving customer satisfaction and retention, and reducing personnel costs and overhead for entering, processing, and tracking orders.



# CAREFULLY DECIDE BETWEEN COMMERCIAL SYSTEMS VS. SYSTEMS DEVELOPED IN-HOUSE

In determining whether to purchase a commercial system or to develop one in-house, the key considerations are the complexity of the order intake process, the number of channels that orders enter through, and organizational goals for improving order processing cycle time, costs, and customer satisfaction.

The system should allow all sales orders to be processed in one centralized location no matter what channel they came through, as well as open up any new digital/electronic channels that will make order processing more efficient. Ultimately, the system needs to support a customer-centric approach with a consistent user experience.

An organization considering a home-grown solution will need to objectively self-assess its capabilities in automating order processing and providing customers with an easy, stress-free process for orders, inquiries, and complaints.

APQC recommends considering commercial systems when there are numerous intake channels for orders or the process has complexities such as a high degree of exception management and challenges in quickly resolving order inquiries.

Not surprisingly, APQC finds a difference between the effectiveness ratings of commercial and homegrown systems. Whereas 75 percent of organizations with a commercial order management solution find their order management extremely effective, only 59 percent of organizations with homegrown systems consider them extremely effective.



# DRIVE BOTTOM-LINE ORGANIZATIONAL SUCCESS THROUGH ORDER AUTOMATION

APQC’s research indicates order processing automation improves outcomes in two corporate KPIs of great interest to the executive suite: lower sales order management costs and improved days sales outstanding (DSO).

In terms of lower total costs to manage sales orders once fully automated, it’s easy to see where automation can reduce tangible and abstract waste<sup>v</sup> through labor and infrastructure required, time spent processing, and reliance on partner functions such as IT.

APQC finds a significant difference in the average value for the measure *Total cost to perform the process “manage sales orders” per \$1,000 revenue* between organizations that have completed automating the sales order process and those that have no implementation. Whereas the process “manage sales orders” costs \$1.64 per \$1,000 revenue for those organizations without order processing automation, it costs only \$1.11 for those with the automation — equating to more than a \$1 million in savings for a company with \$2 billion in annual revenue that automates this process.

## CONSIDER THE FOLLOWING RESULTS FROM AUTOMATING THE SALES ORDER PROCESS:

- // Assa Abloy saw its average order processing time decrease from 60 hours to 2 hours, representing a 97 percent increase in speed<sup>vi</sup>.
- // Terumo Medical Corp. had a 60 percent reduction in the time to process an order<sup>vii</sup>.
- // After automation, Delicato Family Vineyards has orders processed, audited, and released in the same day<sup>viii</sup>.
- // Pelican Products, Inc., which manufactures high performance protective cases and rugged gear, improved its order handling speed, accuracy, and transparency after implementing an order processing solution<sup>x</sup>.The organization reduced its average order entry time by more than 80 percent, moving from 30 minutes for large, complex orders down to five minutes.

Median Response	Cause of Manual Intervention
25%	Invoicing issues
20%	Pricing issues
18%	Contract issues
15%	Incorrect customer master data
20%	Other causes

Percentage of Issues from Manual Sales Order Interventions by Cause

(Figure 3 : N=724)

In terms of order processing cycle time, keeping order processing as a manual task can create delays throughout the order fulfillment process and annoy customers<sup>x</sup>.

By addressing these manual intervention causes through automation, organizations can expect lower DSO. More specifically, as the percentage of manual sales order interventions caused by invoicing issues decreases, DSO decreases. The same is true for interventions caused by pricing issues. Organizations that are in the top quartile (i.e., a low percentage of interventions caused by invoicing or pricing issues) and those in the middle group have a significantly lower number of DSO than those in the bottom quartile.

# RECOGNIZE THE BENEFITS OF AUTOMATION ON CUSTOMER SERVICE AND OPERATIONS

APQC has found that automating order processing has a large impact on external and internal customer service in several important ways. This makes sense, given that an inefficient order fulfillment process can create headaches for not only CSRs but also for every partnering function from production and manufacturing to logistics and accounting. By improving response times and providing consistency across order intake channels, automation can integrate customer service and fulfillment concerns to improve the overall customer experience and hasten the end-to-end order fulfillment process. This section details how order processing automation can:


- // integrate customer service and order fulfillment,
- // improve workflow efficiency,
- // improve the customer experience, and
- // enable CSRs to focus on more value-added activities.

# INTEGRATE CUSTOMER SERVICE AND ORDER FULFILLMENT

Automation provides consistency across communication and order intake channels, even as the number of potential channels continues to expand. From phone calls and faxes to live chat, social media messages, mobile applications, email, and online portals, organizations need to provide — and standardize — the channels that best serve customers to provide a consistent customer experience<sup>xi</sup>. Most customers resent the need to repeat their problem across multiple channels, and **almost 90 percent of customers desire a seamless cross-channel experience<sup>xii</sup>**. Automation is the solution.

That is, automation can help tackle the unique challenges posed by each channel. Fax and email orders traditionally have high error rates and slower fulfillment<sup>xiii</sup>. The highly manual nature of working with those channels can increase costs and make it difficult to prioritize orders and view into the accounts and process itself. Faxed orders in particular require a standalone processing infrastructure of machines and software to connect to ERP systems. And emails can require manual processing if not directed into an automated order processing system. EDI systems are also a challenging channel, with up to a third of orders presenting some sort of discrepancy<sup>xiv</sup>, thus prompting a more involved workflow involving both the customer service teams and the IT function. Automation standardizes all incoming order information so that workflows can be consistent. The system should extract and verify all orders in a similar approach so that one system manages every order.

CSRs can then rely on a single interface to locate and address exceptions and issues. This greatly helps eliminate miscommunication across the order fulfillment process and ensures tasks aren't lost in the workflow and during hand-offs among staff and between functions. When every necessary element — including warehousing, accounting, ERP, and EDI — is integrated, employees focused on production planning, shipping, and logistics have more time to coordinate product delivery.



**By improving response times and providing consistency across order intake channels, automation can improve the overall customer experience and hasten the end-to-end order fulfillment process.**

# IMPROVE WORKFLOW EFFICIENCY

Automated order processing should enable a streamlined workflow with improved speed, accuracy, and transparency. It automates the five stages of:



ORDER RECEPTION



MACHINE LEARNING,  
DATA EXTRACTION,  
AND ORDER ROUTING



DATA VERIFICATION



ARCHIVING AND  
ERP INTEGRATION



DATA ANALYTICS

Organizations using order processing automation have experienced an average of 80 percent faster order processing speeds, staff productivity increased as much as 65 percent, and order delivery times cut from several days to the same day<sup>xvi</sup>—all of which are key markers of an efficient order management workflow. Consider these examples:

- // Brady Corp. reduced its average turnaround time for fax order entry into SAP by 99 percent.
- // Siemens Australia reduced its order processing time by 65 percent, its turnaround time for orders with exceptions by 80 percent, and its SLA processing time by 70 percent.
- // Whirlpool shortened its three-day backlog average to same-day order entry and reduced its order entry time from 43 minutes to 11 seconds.

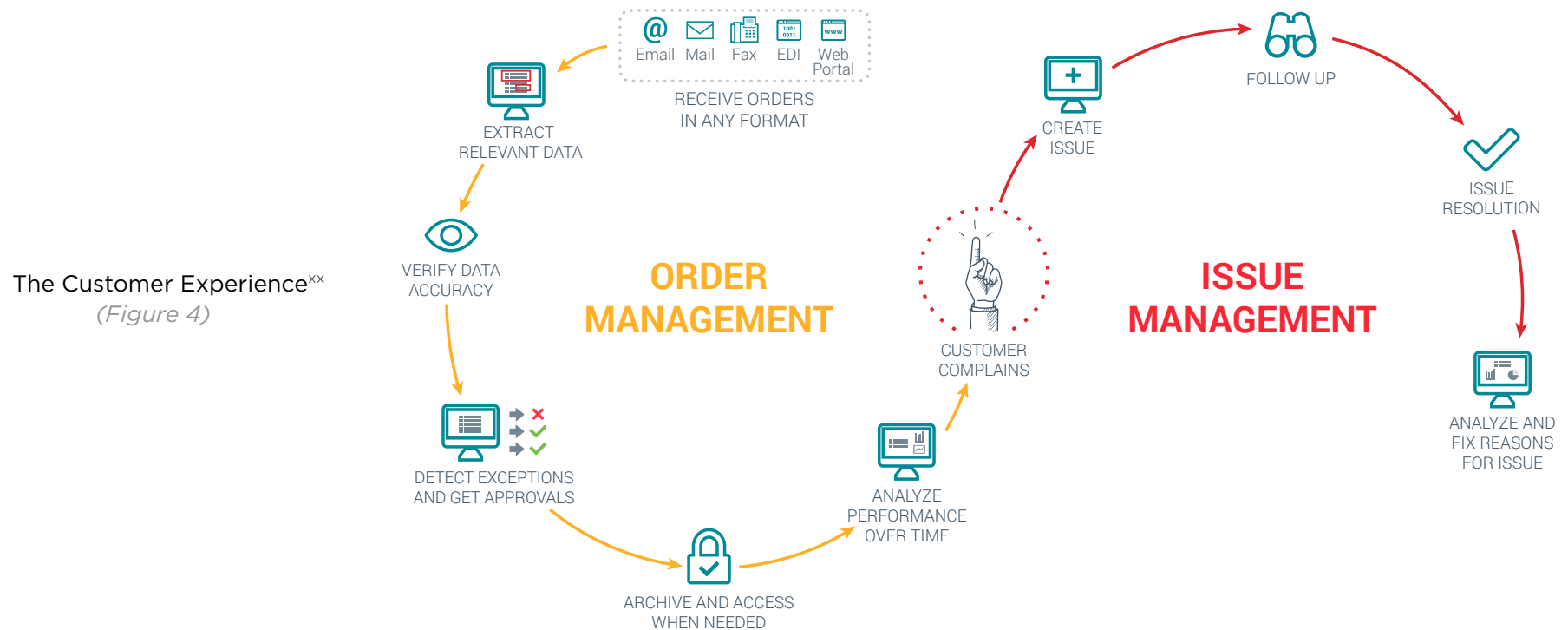
In vitro diagnostics company BioMérieux<sup>xvii</sup> has a large network including 150 countries, 41 subsidiaries, and a large network of distributors. It needed an order management system that would help increase customer service levels and information transparency, as well as reduce manual touchpoints and reliably integrate with existing systems. Ultimately, the organization automated order processing to create a more efficient workflow. BioMérieux went from an average order processing speed of 8 minutes down to 2 minutes and reduced its average number of steps to process a fax/email order from eight to four. This improved efficiency helped the organization save almost €200,000 euros in its first two years of implementation while allowing a leaner staff to manage more orders.



**Organizations using order processing automation have experienced an average of 80 percent faster order processing speeds, staff productivity increased as much as 65 percent, and order delivery times cut from several days to the same day.**

# ENHANCE THE CUSTOMER EXPERIENCE

Order management and issue management go hand in hand for CSRs (Figure 4). Customers expect near-immediate responses<sup>xviii</sup> and a consistent order experience that meets or exceeds their expectations<sup>xix</sup>. They also want to send in orders in whichever format they find most convenient at the time.



To deliver this customer experience, organizations need a high level of responsiveness, standardization, and connectivity — and CSRs need visibility into the order process to operate efficiently. More specifically, CSRs need to easily log, track, and manage all sales orders and customer inquiries in one place. They also need quick and easy access to vital information in order to keep customers informed, quickly resolve issues, and prioritize certain orders.

Ideally, the automated system provides alerts for potential issues, automates resolutions and customer updates, and provides a full audit trail. Built-in workflow engines should support any circumstances surrounding price discrepancies, discounts, or other exceptions that might require authorization. The system should also provide CSRs with dashboards that detail key customer data such as the value of orders waiting to be processed and when customers can expect delivery. In some cases, organizations may want a system that feeds a client-facing portal where customers can take the initiative to submit orders, check order status, and coordinate with a representative.

# ENABLE CUSTOMER SERVICE REPRESENTATIVES TO FOCUS ON VALUE-ADDED ACTIVITIES

Thanks to improved efficiency, accuracy, and effectiveness from an automated order processing system, organizations can expect gains to build and flow through the entire order management infrastructure. This is most keenly seen in the increased capacity of CSRs to take on more valuable work — without having to increase staff or change the way the organization operates.

The traditional tasks of a CSR involve taking orders through multiple channels and entering/transmitting them into a system, handling urgent or unusual requests, and communicating updates to clients. Given that CSRs need to be detail oriented, efficient, and excellent communicators<sup>xxi</sup>, it is wasteful to focus their attention on menial tasks such as data entry and sorting fax orders, particularly when a system can do it faster and better. Order processing automation can free up CSRs' time by automating those menial tasks, as well as standardizing the workflows regardless of order intake channel (e.g., by converting EDI orders into a readable format and detecting discrepancies so CSRs don't have to).

The resulting expanded bandwidth can help CSRs focus on value-added tasks such as resolving customer claims and fostering customer relationships. (And the department can reallocate cash from order processing to customer-friendly initiatives.)

In addition, the dashboards and analytics that come along with an order processing system should help CSRs with those value-added tasks of issue resolution and fostering customer relationships. The increased visibility from easily customizable dashboards can help:

- // recognize priority orders and open orders,
- // address backlogs,
- // flag discrepancies and mitigate risk,
- // create personalized order views,
- // monitor performance against forecasts,
- // manage issue resolution patterns,
- // identify recurring issues with root-case analysis reports and metrics,
- // track order status and what orders need to be approved, and
- // provide KPIs to drive better service.



Chemical manufacturer Tessenderlo Kerley, Inc. (TKI) sought order processing automation to address a number of critical business challenges, including the need to relieve some of the burden its complex, heavily manual order processing approach was putting on its CSRs<sup>xxi</sup>. As a result of automation, CSRs now have more time for their primary role – customer service. The organization has also been able to repurpose some employees to satisfy other higher-value business needs. Post-automation, order processing time has been cut in half from three minutes down to one-and-a-half minutes.

# ANTICIPATE RESULTS FOR DIGITALLY TRANSFORMING ORDER PROCESSING

As a result of implementing sales order automation, APQC's research points to improved customer service and order fulfillment in several key terms including:

- // improved first-time data accuracy for order management,
- // improved order fill rates and on-time delivery,
- // improved customer satisfaction and retention,
- // reduced personnel and overhead costs,
- // improved employee retention,
- // reduced order process cycle times, and
- // reduced monetary value of returns caused by errors in order fulfillment.

In each of these cases, APQC finds that the degree of automation positively correlates with the improved outcomes. And once the process to manage sales orders is fully automated, APQC finds significantly lower costs and improved DSO. This is a critical finding that should compel late adopters to consider automation and those with order management systems to expand automation wherever possible in the process.

The impact of automation on operations and customer service is conclusively positive. Customer service and order fulfillment are integrated across order channels and across partnering functions. The order management workflow is faster, more accurate, and more transparent. The customer experience is more consistent and responsive. And CSRs gain the bandwidth to proactively foster deeper customer relationships.

These outcomes and the rate of adoption suggest that customer service functions are now in a position where they must justify *not* automating the order management process. The proven results — and widespread market availability — make order processing automation the standard practice upon which organization must now compete. Those that fail to automate as much of the process as possible will be at a distinct disadvantage in terms of order fulfillment processing time and overall customer service.



# SPONSOR'S PERSPECTIVE: ESKER INC.

## WHY ORDER MANAGEMENT MATTERS

There are many reasons for companies to implement order management automation — from reducing errors to lowering operating costs to eliminating downstream distribution delays. Although these are critical benefits, automation's most significant added value is its ability to turn ground-level efficiencies into strategic, big picture business benefits. By removing manual bottlenecks and repetitive tasks, employees get more time to focus on upselling and relationship building, customers get a more engaged and satisfying experience, and the enterprise gets more opportunities for new and/or recurring business.



## ARTIFICIAL INTELLIGENCE (AI) + AUTOMATION

Here's how Esker's AI-powered automation solution works: As a new sales order arrives (via fax, email, EDI, etc.), Esker captures the order data, validates that the information is correct, archives the orders inside the Esker system, and links the order back into the ERP/business application. As a result of its incorporated artificial intelligence, Esker's AI Engine gets better results than with standard OCR and templates alone. Based on logic, rules, decision trees, machine learning and deep learning technology, the solution trains itself as it goes, recognizing different formats and easily handling a variety of customer PO layouts. Companies avoid the time and cost of defining and managing countless templates, and are able to bring new customers into the automated process quickly.

**Our managers love the new system.** It gives them the tools needed to effectively lead, while allowing team members to respond more quickly to customers and handle problems directly.

— Director of Business Applications, Pelican Products, Inc.

In our industry where configurable orders are common, Esker was the only one capable of accommodating the level of minutia we deal with. **The solution's flexibility and ease of use is phenomenal. There's really no comparison.**

— E-Business Coordinator, ASSA ABLOY Group

Thanks to Esker, we can now process **90% of our orders without any human intervention.**

— Customer Order and Strategy Manager, PepsiCo

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# ABOUT APQC

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APQC helps organizations work smarter, faster, and with greater confidence. It is the world's foremost authority in benchmarking, best practices, process and performance improvement, and knowledge management. APQC's unique structure as a member-based nonprofit makes it a differentiator in the marketplace. APQC partners with more than 500 member organizations worldwide in all industries. With more than 40 years of experience, APQC remains the world's leader in transforming organizations. Visit us at [www.apqc.org](http://www.apqc.org), and learn how you can make best practices your practices.

# ABOUT ESKER

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Esker is a global leader in AI-driven document process automation software. Esker's cloud-based solutions are compatible with all geographic, regulatory and technology environments, helping over 11,000 companies around the world improve efficiency, visibility, and cost-savings within their order-to-cash (O2C) and procure-to-pay (P2P) cycles.

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.



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