

WEBINAR

# 8 Order Management KPIs

For Operational Excellence



**ESKER**<sup>®</sup>

# Meet Today's Speaker



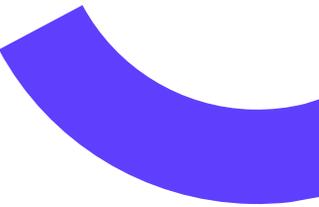
**Matt Kulas**

Business Development Manager  
Esker



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# Why are Order Management KPIs important?



## Poll Question 1:

# How automated is your current order management process?

- Fully automated
- Largely automated
- Partially automated
- Not automated at all

# Order “speed” KPIs

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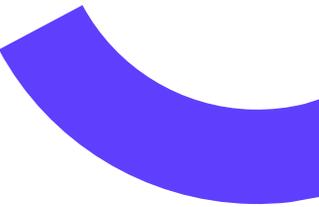
**01** Order Cycle Time

**02** Response Time

# 01 Order Cycle Time

## HOW TO CALCULATE

$(\text{Shipping date} - \text{order date}) \div (\text{Total orders shipped}) = \text{OCT}$



# 02 Response Time

## HOW TO CALCULATE

$(\text{Time of response}) - (\text{Time of customer inquiry}) \div (\text{number of inquiries}) = \text{RT}$

HOW AUTOMATED OM SOLUTIONS HELP:



# ORDER “SPEED” KPIS

# Automated routing

Based on extracted order data



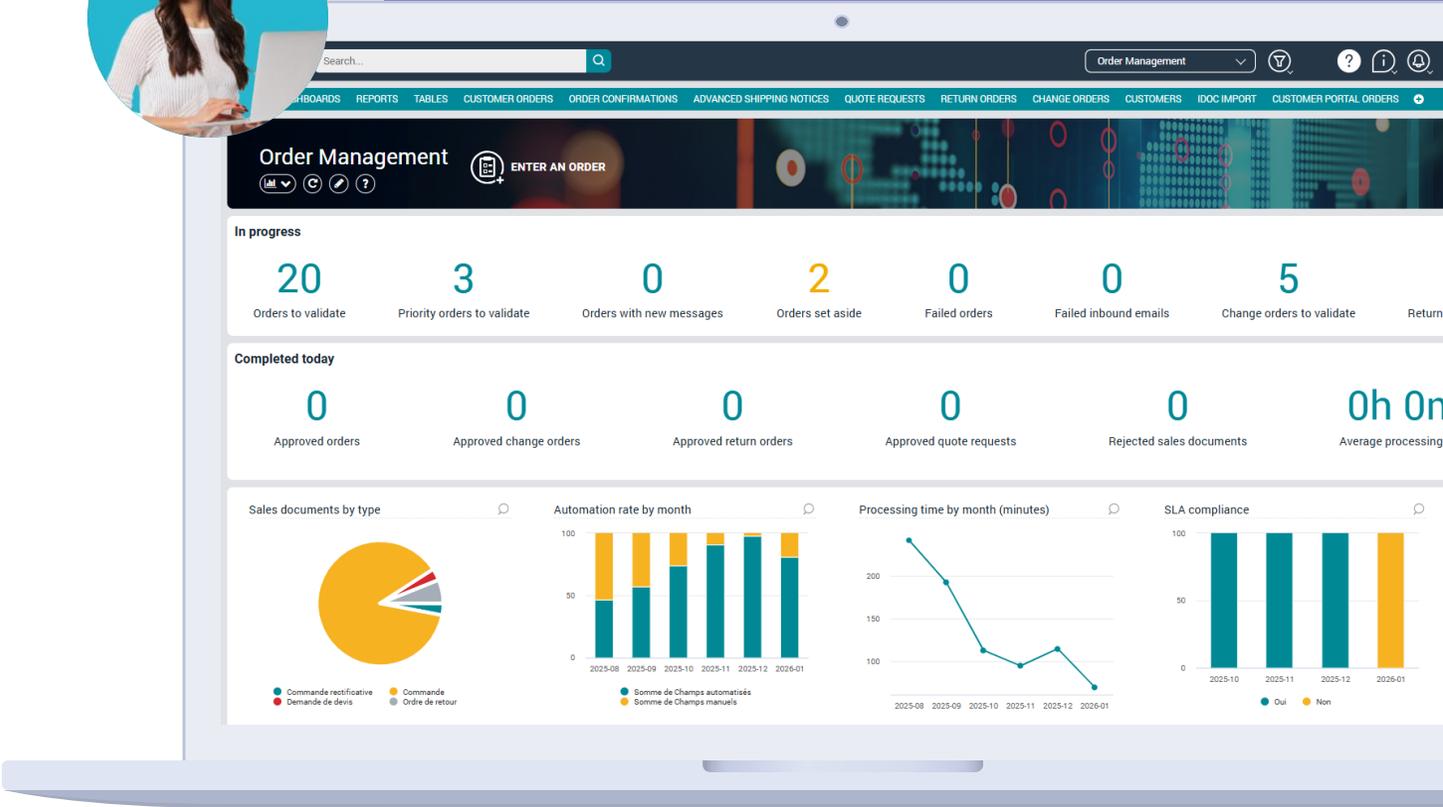
Automatic order dispatch to the appropriate queue (Customer Service Rep or Team)



Priority orders management



Based on key order information: customer, distribution channel, ordered items, etc...



# Order verification

Order data extraction & verification against ERP reference data

Original order image

The screenshot shows the SAP Customer Order interface on the left and a PDF document preview of a purchase order on the right. Yellow boxes and arrows indicate data extraction points:

- Customer Information:** Number 3176, Name Computer 3000, Street 1 Michigan Avenue, City WESTCHESTER, Region IL, Country US.
- Shipping Address:** Number 3176, Name Computer 3000, Street 1 Michigan Avenue, City WESTCHESTER, Region IL, Country US.
- Order Details:** PO number CT45581, PO date 6/7/2024, Req delivery date 7/7/2024, Total 12,595.60.
- Items Table:**

| Item   | ERP material | Description                      | Extr. qty | Cust. UoM | Quantity | UoM |
|--------|--------------|----------------------------------|-----------|-----------|----------|-----|
| R-1002 | R-1002       | Maxitec R 3133 Personal computer |           |           | 3.00     |     |
| R-1001 | R-1001       | Maxitec R 3100 Personal computer |           |           | 2.00     | PC  |
| R-1140 | R-1140       | TFT Monitor, 17"                 |           |           | 5.00     | PC  |
| M-15   | M-15         | SEC Multitouch XV15              |           |           | 2.00     | PC  |

The PDF document on the right is a purchase order from COMPUTER.3000 to ACME US INC. It includes a table of items with columns for Item #, Description, Unit Price, and Line Total.

| Item # | Description                             | Unit Price | Line Total |
|--------|---|------------|------------|
| 3      | R-1002 Maxitec R 3133 Personal computer | 1307.40    | 4172.20    |
| 4      | R-1001 Maxitec R 3100 Personal computer | 1185.00    | 2370.00    |
| 5      | R-1140 TFT Monitor, 17"                 | 723.00     | 3615.00    |
| 6      | M-15 SEC Multitouch XV15                | 1187.76    | 2375.40    |

Automatically captured order data



Eased user review with original order image and extracted order data displayed side-by-side



Assisted and automatic data verification at the header & line item level



Automatically detect unusual quantities, for a given product & customer, based on historical data



TRANSPARENT  
LEARNING



BASED ON  
DOCUMENT STRUCTURE

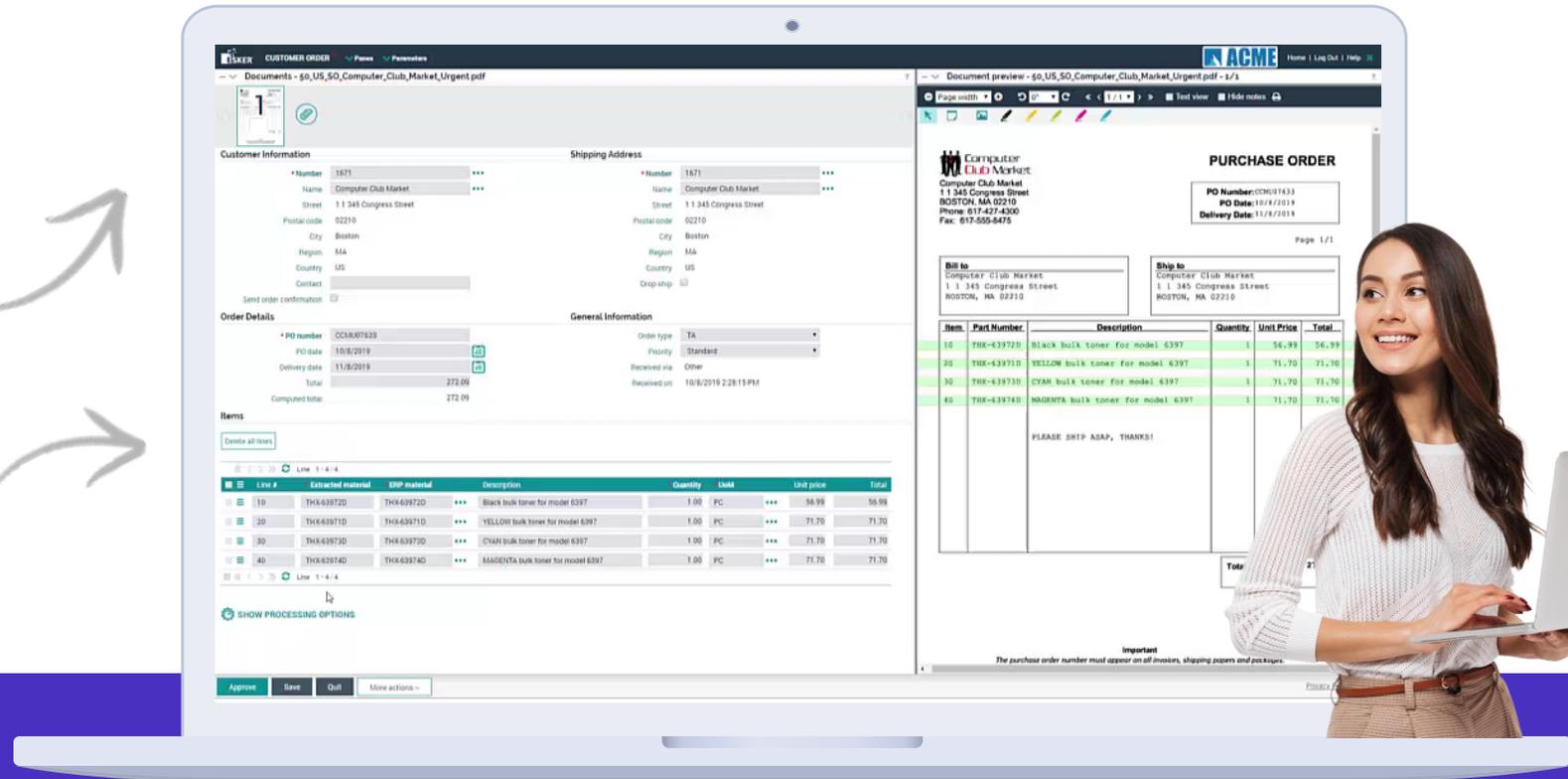
ESKER

# One-click & automatic processing

Automation to its maximum

Automatic processing can be enabled for specific customers

Blocked in case of failed data checks



GO TOUCHLESS WHEN POSSIBLE



BENEFIT FROM BUILT-IN DATA CHECKS SECURITY

Customer Story

# FUCHS Lubricants

Speed, precision & transparency in every area of Customer Service



## Results



**Reduced order entry** time by 25%



**Improved order entry turnaround** time from 24-48 hours down to 6 hours



**Automatically classifying** 84% of all incoming customer inquiries



**Eliminated 100% of paper** thanks to electronic archiving



**Improved employee satisfaction** by balancing workloads, freeing up time for more fulfilling and impactful work, and reducing the amount of customer status requests

**“In Esker, we see the exact breakup of work we have in front of us. And from there, we can reposition individuals to create a better balance for our team.”**

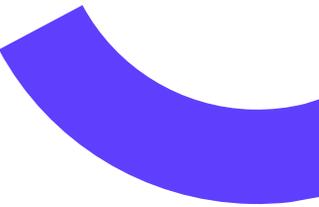
Chris Raleigh | Business Process Expert (O2C) Americas

# Order “quality” KPIs

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**03** On Time In Full

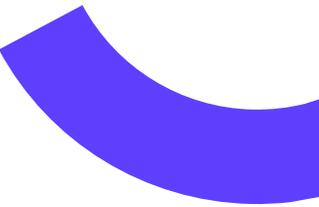
**04** Perfect Order Rate



# 03 On Time In Full

## HOW TO CALCULATE

(Total deliveries made on time and in full) ÷ (Total deliveries made) x 100 =  
OTIF



# 04 Perfect Order Rate

## HOW TO CALCULATE

$(\text{Orders delivered without incident}) \div (\text{Total number of orders}) \times 100 = \text{POR}$

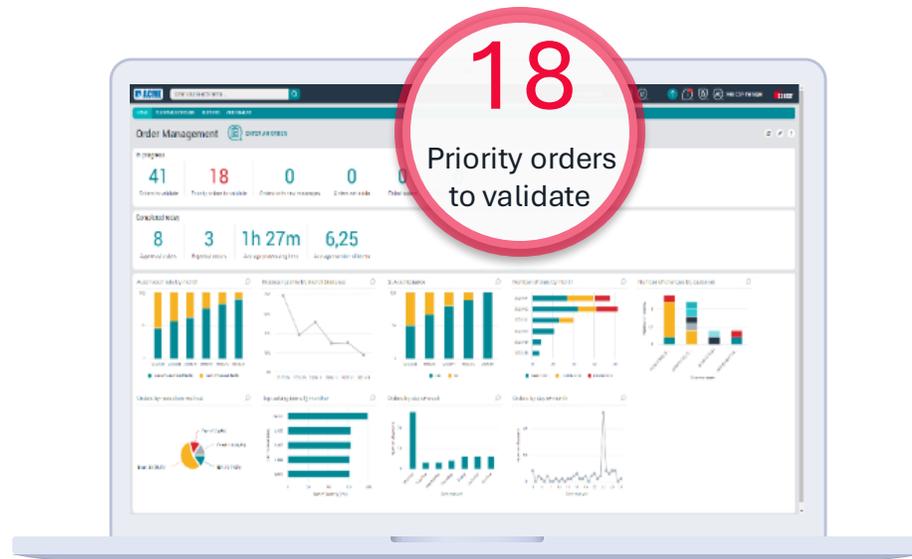
HOW AUTOMATED OM SOLUTIONS HELP:



**ORDER “QUALITY” KPIS**

# Dashboard & analytics

Keep key information at-a-glance



## DESIGN

as many dashboards, views and reports as you need

## SHARE

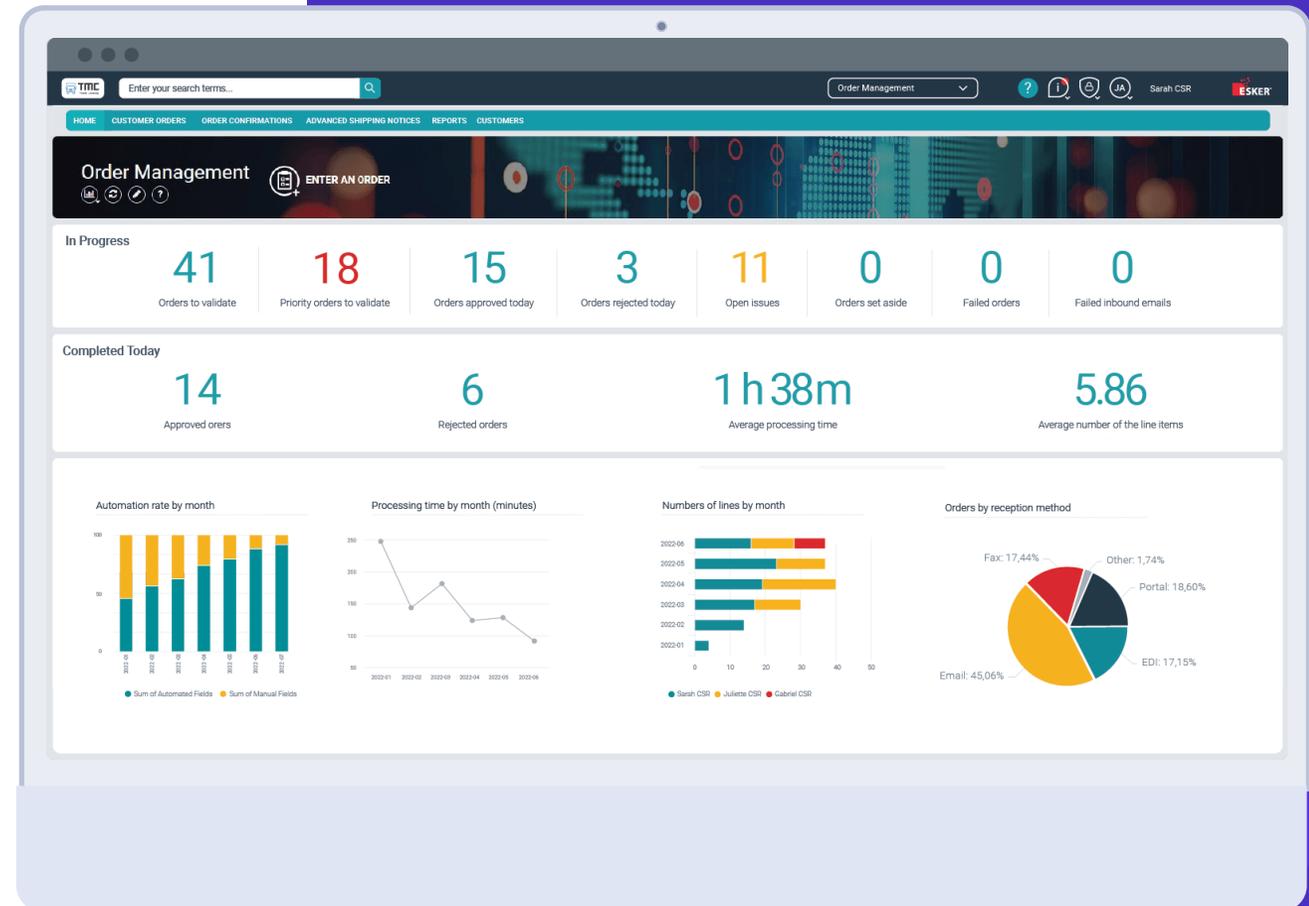
with colleagues & stakeholders

## 100%

customizable views, metrics & charts

**No more time wasted hunting down needed data!**

Replace, reorganize, add, remove or edit



# Data analytics for each user

Available directly at your fingertips



Customer

- Draft orders
- Pending orders by status
- Received orders



CSR Manager

- Order processing & validation time
- SLA compliance
- Orders by country & reception method
- Average order lines & lines per CSR



Sales Rep

- Customers' new orders
- Customers' order amounts
- Customers' top-selling items
- Customers' order SLA compliance



Supply Chain Director

- Orders & priority orders to ship
- Backlog order items (demand prediction)



IT Manager

- Automation rate
- Order processing time
- Order validation time
- Orders by reception method

Custom views, metrics, and charts tailored to each stakeholder's goals and responsibilities.

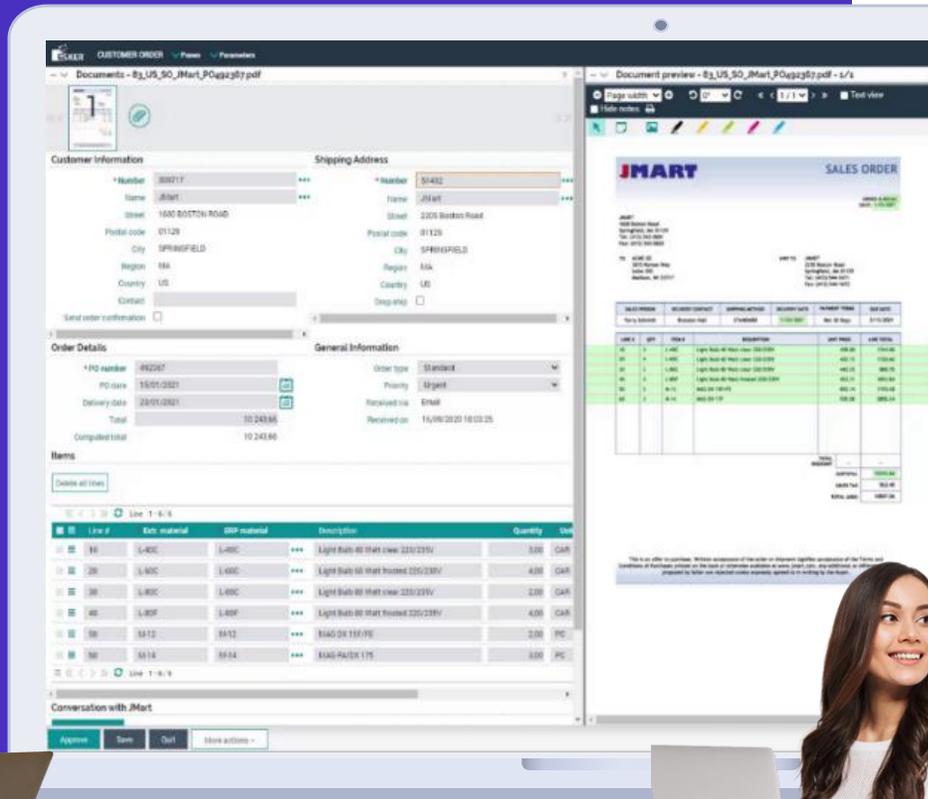
# External conversations

Clarify orders directly with customers

Communication & 3rd-parties leveraging templates with customers



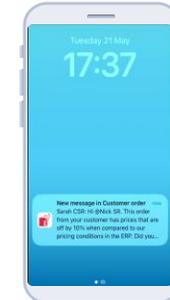
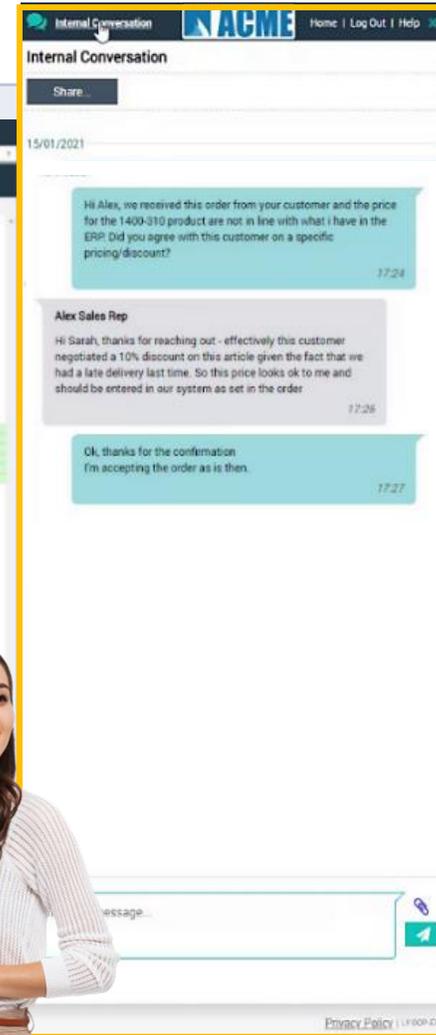
CUSTOMER



CSR

# Internal conversations

Clarify orders directly with co-workers



Chat conversation associated to any given order

Easily collaborate by adding co-workers to the conversation and tagging them



SALES REP

# Product semantic search

Identify the correct product based on a description only

Natural Language  
Understanding AI Technology

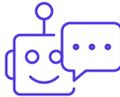
## Feature



Customer description extracted



Semantic search on products database



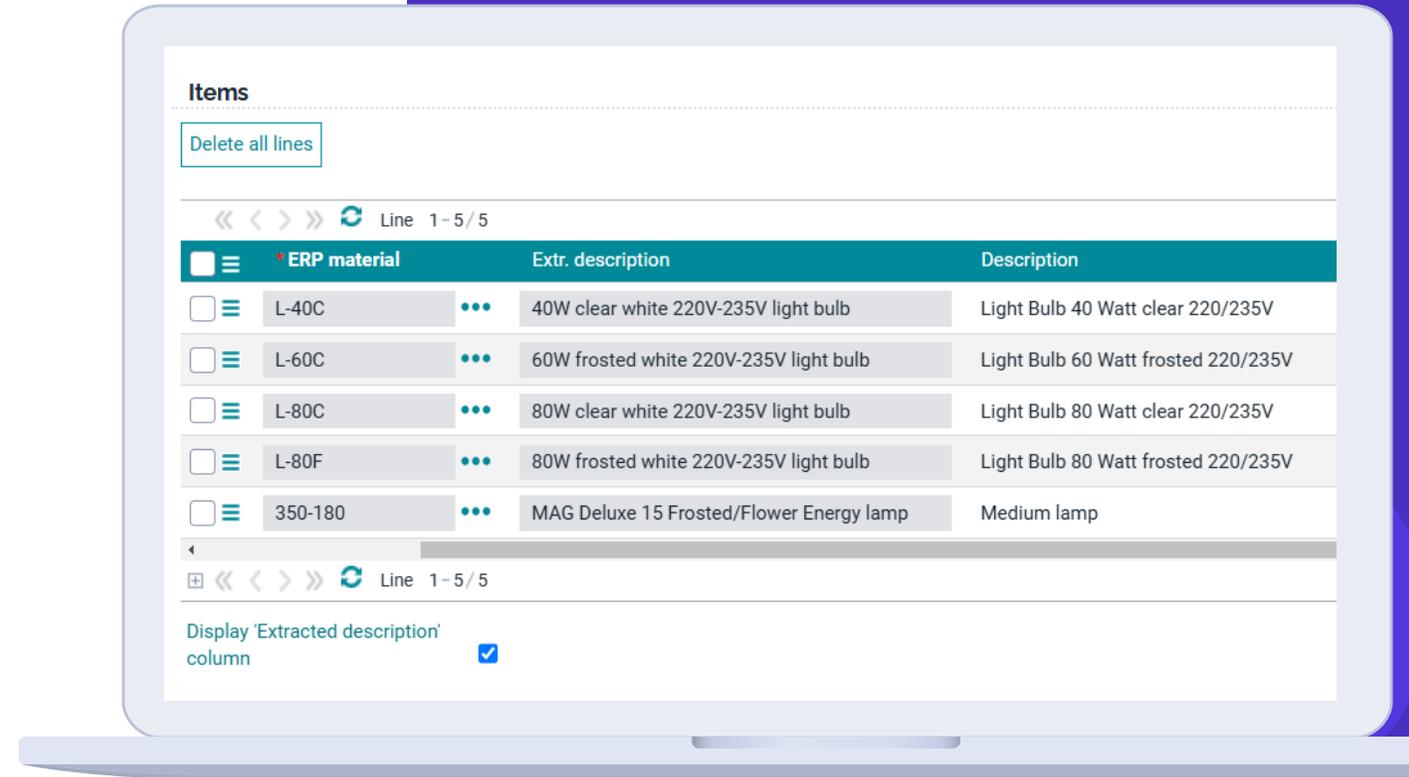
Best match proposed



Mapping between description & product saved

## Benefits

- Reduce manual work for CSRs
- Increase order processing automation



Customer Story

# MCR Safety

Achieving the oversight & insight needed  
for greater customer service

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## Results

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**Lowered average order processing time** from 12–24 hours to less than one hour.



**Reduced order-entry errors per month** from 75 to 28, on average



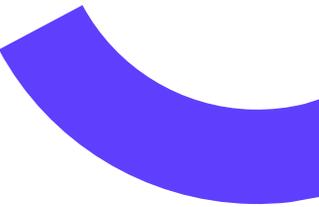
**Achieved a 92% automation** rate through Esker



**Before automation, what used to take 14 people** to process daily orders, **now only requires 10**

“CSRs now have more time to talk to the customers and build rapport. This allows them more time for following up on leads, train on other programs, expand product knowledge and other things that actually add value.”

Deborah Buck | Director of Customer Care



## Poll Question 2:

**Which area of order management performance is currently the most difficult for your organization to measure accurately?**

- Order processing speed (cycle time, turnaround)
- Order accuracy / error rates
- Cost to serve per order
- Customer experience or satisfaction tied to orders

# Customer Perception KPIs

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**05** CSAT

**06** NPS

# 05 CSAT

## HOW TO CALCULATE

$(\text{Number of Satisfied} \div \text{Very satisfied customers}) \div (\text{Total number of responses}) \times 100 = \text{CSAT}$

# 06 NPS

## HOW TO CALCULATE

$(\text{Number of Promoter scores} \div \text{Total number of respondents}) - (\text{Number of Detractor scores} \div \text{Total number of respondents}) = \text{NPS}$

HOW AUTOMATED OM SOLUTIONS HELP:



# CUSTOMER PERCEPTION KPIs

# AI-Assisted Answers

Leveraging NLP & ChatGPT Technologies



## Feature



Classification in the appropriate category



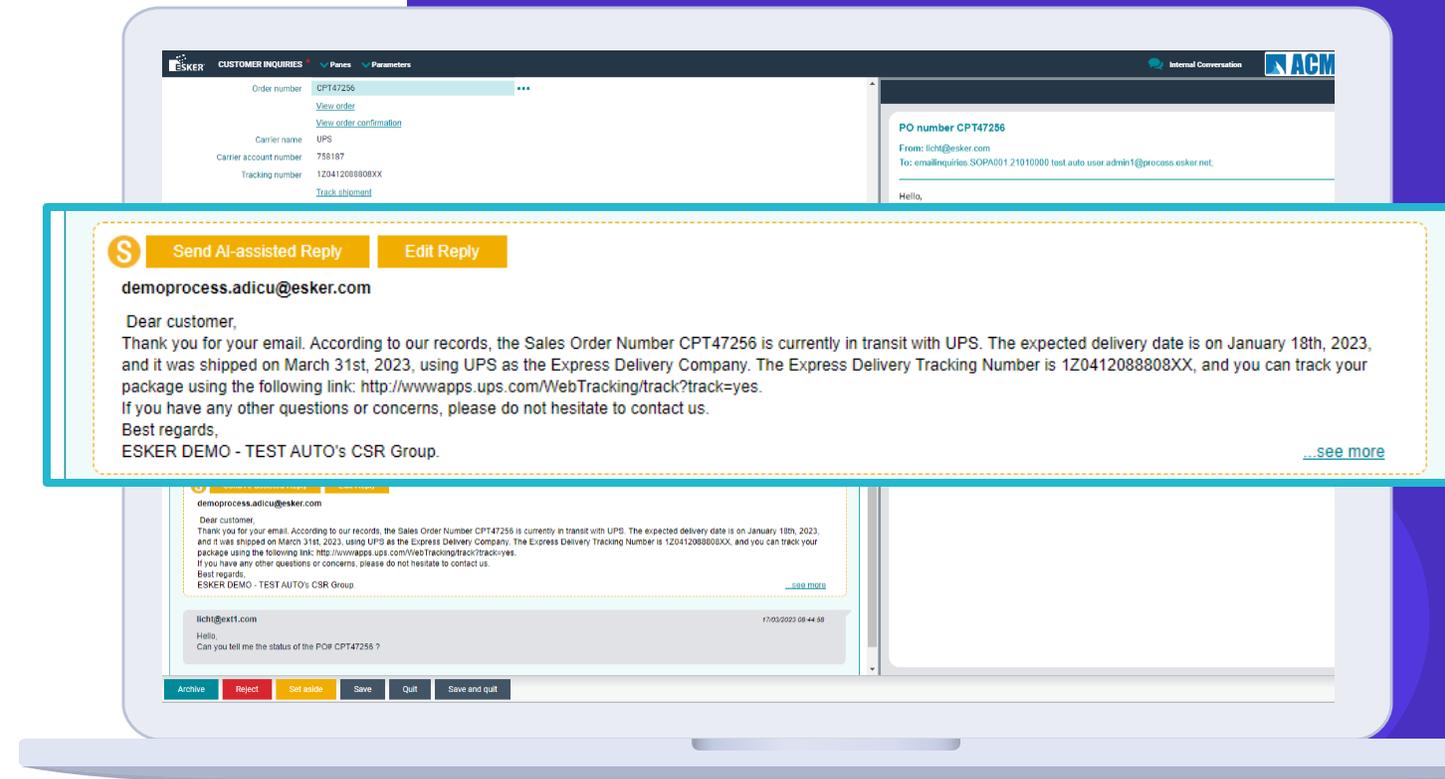
Identification of the customer's sentiment



Content extraction & data retrieval

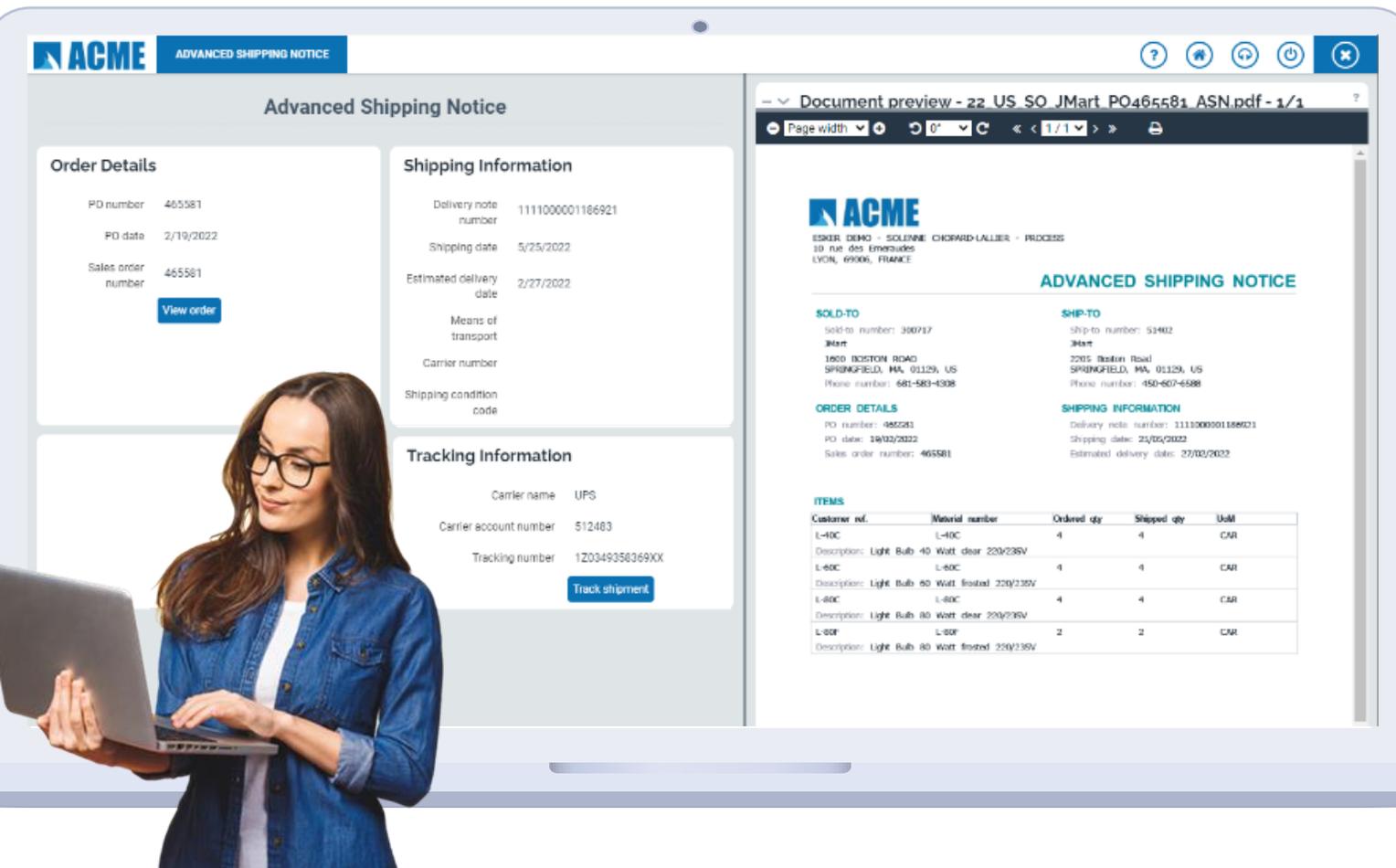


Generation of a recommended answer



# E-commerce portal

Placing orders 24/7



CUSTOMER



Online ordering  
from e-commerce catalog



Order payment capabilities  
(partial or in full)



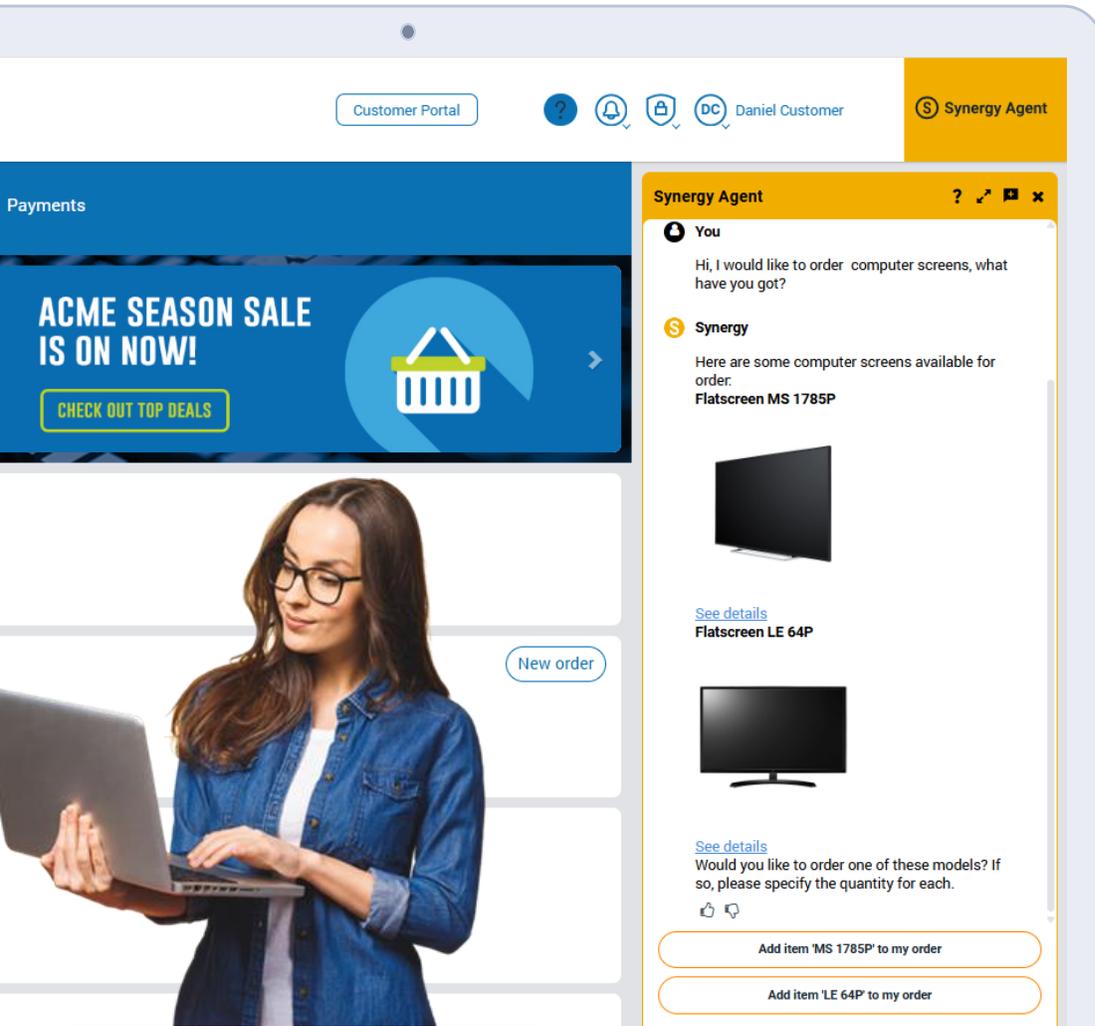
Providing order status



Part of your Order Management  
Solution

# Customer Agent on Customer Portal

Helping customers find & order the product they need 24/7



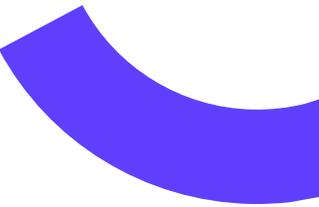
CUSTOMER

## Feature capabilities

- ✓ Agent helping the customers access product details
- ✓ Guiding them through order placing
- ✓ Using natural language via chat or voice

## Benefits

- Improve customer experience through intuitive interactions and instant, 24/7 answers
- Reduce CSR workload



## Poll Question 3:

# What is the biggest barrier to improving order management performance today?

- Manual processes / limited automation
- Lack of visibility across systems or teams
- Inconsistent or unclear KPIs
- Change management / adoption across departments

# Employee Satisfaction

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# 07 Employee Satisfaction

## HOW TO CALCULATE

$(\text{Number of Satisfied} \div \text{Very satisfied employees}) \div (\text{Total number of respondents}) \times 100 = \text{eSat}$

# How Automated OM Solutions Help

## Employee Satisfaction

Automated OM solutions offer a much-needed antidote for low eSAT scores. By transitioning away from data entry, employees are free to focus on more fulfilling and impactful activities.

- Relationship building and nurturing CX initiatives with your most strategic customers
- Reengaging with inactive/formerly disgruntled customers
- Cross-selling and/or upselling
- Proactive communication regarding shipment status, partial shipments and more

A recent Gallup reports shows that companies with “engaged” workers have a



compared with those with “miserable” workers.

# Cost to Serve

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# 08 Cost to Serve

## HOW TO CALCULATE

1. Identify what activities (quoting, order-taking activities, etc.) are necessary to service and maintain each customer.
2. Approximate cost of doing each activity.
3. Identify a value that each customer comprises of these activities and perform cost allocation.

# How Automated OM Solutions Help

## Cost to Serve

Freeing your team from the drudgery of manual OM activities reduces the:

- Amount of average touches on an order and other common points of “friction” (navigating disparate systems, working with various spreadsheets, etc.)
- Average handling time for each order, particularly for high-involvement cases like change orders, which are often associated with unnecessary costs)
- Other B2B Customer Service costs associated with fulfillment errors and communication snafus, reliance on paper, printers and ink, and loss of customer trust

The ROI and cost savings a med device achieved by automating its OM process:

**274%**  
return on  
investment



**\$978.7k**  
net present value

Source: [https://cloud.esker.com/fm/others/forrester-total-economic-impact-of-the-esker-order-management-solution\\_2021.pdf](https://cloud.esker.com/fm/others/forrester-total-economic-impact-of-the-esker-order-management-solution_2021.pdf)

Customer Story

# Moen

Achieving 50% Faster Order Processing Speeds

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# MOEN®

## Results

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**Reduced order processing time by 50%** (4.5 minutes to 2.5 minutes per order)



**Improved prioritization of workflow**, allowing resources to be more appropriately allocated



**Ability to ensure same-day processing** thanks to reporting capabilities



**Maintained a 99.5% accuracy rate**

**“We went from zero visibility to having full transparency into our order management process. We know exactly what’s going on and can shift our resources as needed.**

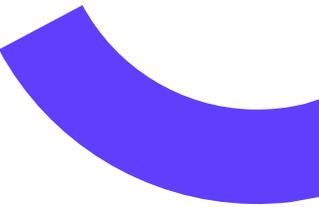
Karen Rechenbach | Customer Service Business Support Leader

# REMEMBER:

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KPIs are not a magic wand or secret formula that instantly equate to success.





## Poll Question 4:

# Are you currently evaluating solutions?

- Yes, there is a current project
- Maybe a future need
- No there is no planned project

# Part of an Order-to-Cash suite

Break silos and maximize efficiency across Customer Service & Accounts Receivable teams



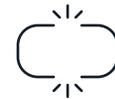
## Cash Application

Automatically create deductions from short payments identified in remittances and start the investigation process as early as possible.



## Collections Management

Automatically create claims from invoice disputes & ensure invoices associated to claims are not collected until the claim is resolved.



## Invoice Delivery

Associate claims with their corresponding invoice & proof of delivery sent along with the invoice, and easily navigate between documents.



## Customer Inquiry Management

Automatically identify claim supporting documents and emails in shared mailboxes and route them to the solution thanks to AI-driven classification.



## Order Management

Associate claims with their corresponding order and easily navigate between documents.

# Hi, we're **ESKER**<sup>®</sup>

Esker's AI Automation Suite for the Office of the CFO leverages the latest in Agentic AI and automation technologies to optimize working capital and cashflow, enhance strategic decision-making, and improve human-to-human relationships with customers, suppliers and employees. Esker's Source-to-Pay and Order-to-Cash solutions automate any business process while supporting long-term growth strategies.



**40 years of experience**  
with 20+ years focused on  
cloud solutions



**15 global locations**  
with headquarters  
in Lyon, France



**1,100+ employees**  
serving 1.12M users and  
3,000+ customers worldwide



**€205.3 million**  
in revenue in 2024



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.

# ESKER<sup>®</sup> All Access

conference

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September 9-10, 2026 | Chicago, IL

- **Discover how to apply** the latest AI trends to drive real, measurable outcomes
- **Exchange ideas** & proven strategies with 500+ customers, partners & peers
- **Get an inside look** at Esker's product roadmap & how it's supporting the Office of the CFO

# Thank you

Let's move forward!

**ESKER**<sup>®</sup>

**Matt Kulas**

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