

A woman with voluminous curly hair is smiling while talking on a mobile phone. She is wearing a white short-sleeved top and a long necklace of orange, oval-shaped beads. The background is a blurred clothing store with racks of clothes and warm lighting.

**RafterOne**  
— An IPG Company —

# Revolutionize Your Customer Experience Thru Order Servicing

Increase customer satisfaction, reduce the cost to serve while creating a world-class customer experience.

# Your Most Expensive Channel Meets Your Most Frequent Channel

Do you know what your most expensive service channel is? From our experience working with many manufacturing and HLS customers over the years, the most expensive channel is without a doubt:

1. Customer makes a purchase, doesn't know when it will arrive, so they call the sales rep.
2. Sales rep doesn't have access to the ERP or doesn't want to look up the order status, so they call customer service.
3. Customer service needs to look up the order status in the ERP. They can do this on a call or can call the service rep back with the customer's order status.
4. Sales rep then calls back the customers.

This exchange can happen over minutes or over hours. But regardless, it is the most expensive channel because it is:

## Costly



Involving multiple employees per case, with sales being the most expensive channel.

## Inefficient



6 different calls/texts/messages to find out the status of an order.

## Poor Experience



The customer's request can't be resolved in a single call.

Here's the worst part. The industry average is that 70% of all case volume is some version of 'where is my order' (WISMO). So that means that your highest volume case type (WISMO) meets your most expensive channel (sales rep + customer service). This is a problem.

What this reveals is that lack of order visibility is a huge cost to businesses today.

## Buyers Expect More from Businesses

Part of the issue is that in the buyer's consumer life, this is never a problem. When they order from Amazon, they have an expected delivery date, and they can go into their account 24x7 to see if the order status has changed.

They order \$30 worth of food delivery or groceries and can see in real-time when the driver left the store and when they are on their street. The Domino's Pizza Tracker is the gold standard when it comes to seeing minute-by-minute where your order is.

But when they order thousands of dollars' worth of B2B items, it is basically a black hole until the day the shipment shows up on their doorstep. Or, if that delivery date passes, they need to call customer support or their favorite sales rep to find out one single piece of information: where is my order?

According to a recent Salesforce survey, 84% of customers experience inconsistent experiences across channels. This leads to customer frustration, reduced loyalty, and overall negative experiences.

Customers want to be able to self-serve. According to a recent article by the Harvard Business Review, 4 out of 5 customers tried a self-service channel before calling customer support. That means that they either logged into an account or engaged some kind of bot before picking up the phone and calling the service agent. Customers want to solve their problems on their own, but the issue is that businesses aren't equipping them with the necessary tools to do so.



# Order Servicing to The Rescue

There is an alternative. When businesses bring orders into their CRM and then send out automated order status updates, it decreases support time and self-service deflections by 30%. This works out to be:

- 10% case deflection from orders status. So 1 out of 10 cases completely disappear when orders are proactively sent to customers.
- 25% decrease in case resolution time when order visibility is in a CRM, not an ERP.

Just by integrating orders into the CRM, companies see an almost one-third improvement on how they are servicing orders. This has nothing to do with adding new applications, streamlining warehouse logistics. By simply bringing orders into the CRM, it allows automated status updates to go directly to customers and lets internal sales and service users view the order status at any time on any device.

## Order Servicing

- Improves customers experience and satisfaction by provided order status updates automatically.
- Decreases support costs by reducing the cases created, lowering case resolution time and equipping users with accurate data in their CRM.
- Scales to meet growing demands, where customers want better communication and on the channel they prefer.

And the best part is that you don't need to add additional applications to your tech stack to achieve these types of results.



# Order Servicing Powered by Service Cloud

**Order Servicing is an extension of the #1 Customer Service application on the market: Salesforce's Service Cloud. It's the same application that:**

1. Agents live in all day, day in and day out, to manage cases.
2. Has powerful Customer 360, showing all interactions for customers in a single place.
3. Offers declarative automation tools for handling repetitive tasks and process flows.
4. Provides powerful analytics for managers and executives.

This very same Service Cloud is extended to bring in orders from the ERP. Every time an order status changes, it writes back into Service Cloud. This update triggers an automation to send notifications, whether it's an email to the customer or a notification to the account owner about an order being shipped or delayed.

The power of bringing order status into Service Cloud is that you can now use it to enhance your customer engagement. Service reps no longer need to switch between the Service Console and the ERP to look up orders. Sales reps no longer need to send texts or Slack messages to get an order status update for important customers. All this information is readily available for users in the one place where they engage with customers: Salesforce.

## Order Servicing Is a Cost Saver

If the lack of order visibility is a significant cost to businesses, then providing order visibility in the CRM becomes a substantial cost saver. It reduces case volumes by up to 25% and decreases "where's my order" cases by 10%. If you choose to expose this information via a chatbot or textbot, the savings go up to 30-40%. **Just imagine:**

- Your service department reclaims 2 hours a day to work on higher-value activities.
- Your sales team never has to call a support agent again to get the status of an order.
- The experience of your distributors no longer includes calling in to ask about their order's status.
- Increasing orders by 25% without the need to hire more agents to handle the increased case volume.

All of this becomes possible when orders are liberated from the ERP and integrated into the CRM. Once the data is in the CRM, you can view it, transact on it, and report on it.

These days, businesses are looking to both grow and save. Order Servicing allows you to scale your support operations, while reducing the cost to serve at the same time.

# Crawl, Walk, & Run

There are three different approaches to Order Servicing:

## Crawl



Bring in orders into the CRM and set up automatic notifications.

## Walk



Expose order status via Chatbot or Textbot for self-service.

## Run



Implement Salesforce's Order Management to do post-sale order fulfillment.

By implementing any one of these approaches, customers will begin to see dramatic decreases in the cost to serve, increased customer satisfaction and a pathway to scale the business.

Schedule a Free Order Servicing Assessment that:



Analyzes your Salesforce setup



Identifies way to reduce costs



Recommends Next Steps



## About RafterOne

When we looked to structure the most comprehensive collection of strength, reliability, and quality for solid end-to-end commerce in the Salesforce ecosystem, we extended beyond experience. We sought to secure a spirit connection for solution builders, collaborative creators, and born leaders to do their best work as one problem-solving team.