conexiom

From Manual to Touchless: Transform Your Business Results with Sales Order Automation

How to compete to win customers by automating sales order processing

Wholesale distributors and manufacturers can leverage Conexiom's Sales Order Automation from within most any ERP system to protect and grow revenue by elevating the customer experience.

Companies like Honeywell®, Grainger®, and Graybar® use Conexiom to process millions of transactions each year.

The Times, They Are Changing... Rapidly

Market forces have changed how customers interact with your businesses. Whether it's because of COVID-19, Amazon, or something else doesn't really matter. What matters is that, now more than ever, customer experience is a key differentiator between you and your competitors:

▸ B2B customers increasingly demand a B2C "Amazon-like" experience with greater accuracy, faster ship times, and improved levels of customer service.

▸ Customers expect to do business from anywhere, at any time, and on their own terms without changing their current behaviors and systems.
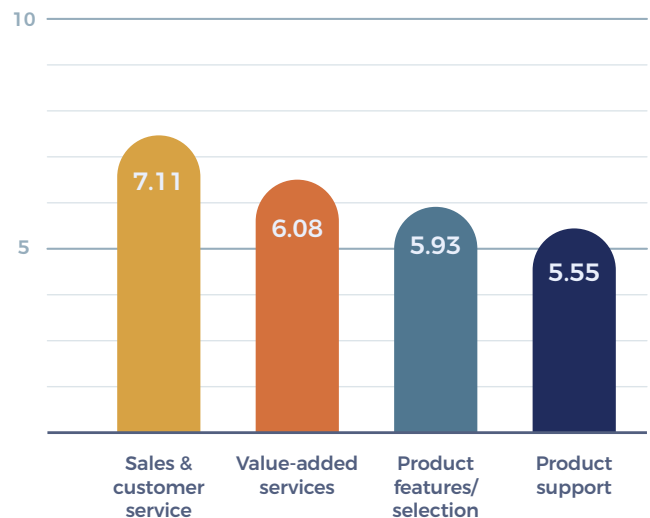
This disruption of traditional B2B transactions has created a mandate for digitization upon the moment of order capture. After all, digital transformation is a proven way to reduce costs, sell more, and proactively spend more time with customers.

95% of distributors surveyed believe customer experience will have a significant impact on revenue.

MDM and Conexiom Survey
January 2021

## How does customer service impact business success?

Most distributors say customer service significantly impacts revenue.

74.8%	21.95%	3.25%
Significant	Moderate	Low

7.11	6.08	5.93	5.55
Sales & customer service	Value-added services	Product features/ selection	Product support

Meet Customers Where They Are

The customer is always right. And each customer has his or her own way of doing business. Companies must embrace each customer's uniqueness or risk losing them.
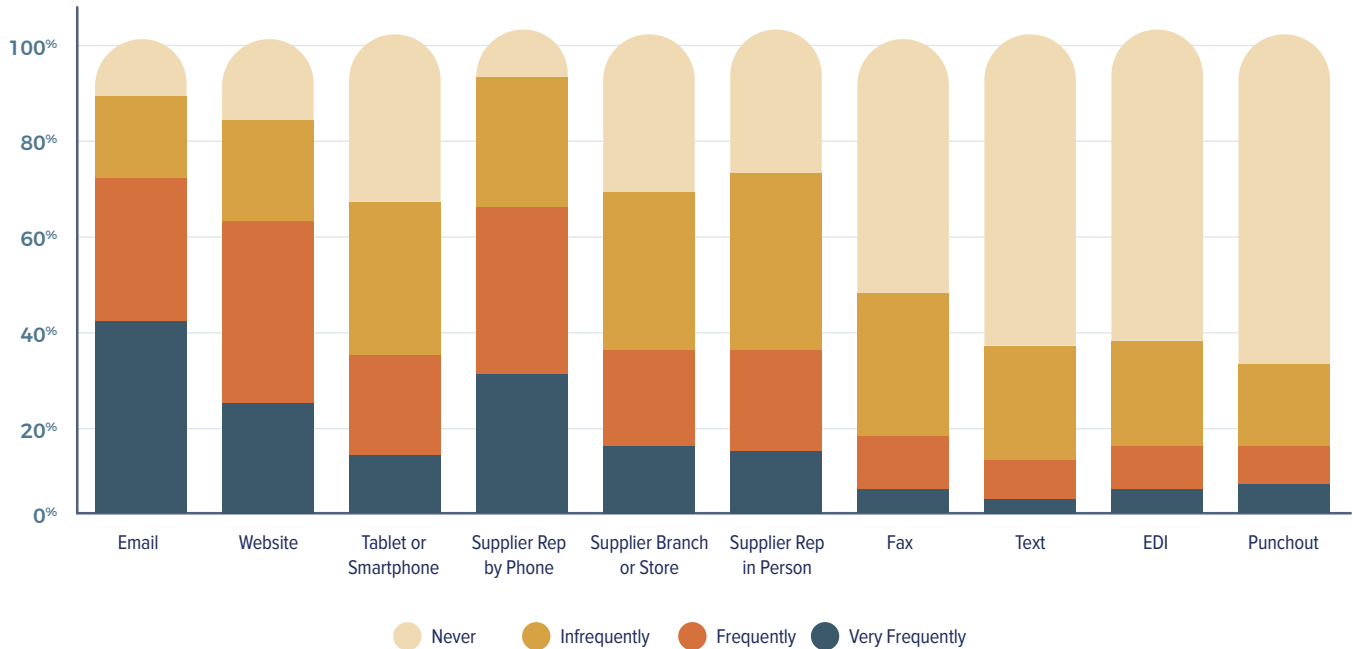
Manufacturers and distributors must cater to all purchasing channels, with email being the most frequently used.

Even when offered multi-channel ordering platforms—such as ecommerce, EDI, or punchout websites—most buyers that work with wholesale distributors choose to email their orders. They find this approach much easier than re-keying the order into a distributor's transaction platform. And who can blame them? It's much easier to click the Send via Email button in their ERP system, rather than logging into another platform and entering the same order for a second time.

But where email may make the most sense for the buyer, it creates a bottleneck for distributors and manufacturers who must export and re-enter those orders into their ERP system for processing.

The Inefficiencies of Manually Processing Orders

On any given day, wholesale distributors and manufacturers receive orders through many different channels:

- ▸ B2B ecommerce
- ▸ B2C ecommerce
- ▸ EDI
- ▸ Punchout websites
- ▸ Email
- ▸ Web portals
- ▸ Print
- ▸ Fax
- ▸ Phone

Kudos for accommodating your customers' ordering behavior, but accepting orders in various formats is hell on your CSR team.

That's because most of these orders must be manually entered into your ERP system. This process takes time, effort, and basically turns your CSRs into expensive data-entry clerks for up to 50% of their day.

A manual approach to order processing slows the order cycle, as staff must generate, review, and even re-enter orders into your ERP system.

Target for generating new revenue

40% **70**%

Actual time spent proactively

CSRs spend only 40% of their day being proactive (anticipating and preparing for issues in order to improve customer experiences), but indicate that percentage needs to be at least 70% to generate new revenue.

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If you take a step back and think about how orders are manually processed, you'll see that, typically, every single order requires multiple steps:

1. **Receive the order.**
2. **Print the order.**
3. **Enter the order into an ERP system.**
4. **Alert the customer that the order was received.**
5. **Send the order to the warehouse.**
6. **Pick the order.**
7. **Pack the order.**
8. **Ship the order.**
9. **Alert the customer that the order shipped.**

If your team mimics these steps for every order, you're wasting precious resources that have the potential to proactively engage with customers to enhance the customer experience, recruit new clients, and ultimately deliver additional revenue.

Companies can eliminate inefficient business processes by implementing Sales Order Automation. In fact, with the many ways that they receive orders, wholesale distributors are particularly well positioned to fully leverage the Conexiom Automation platform.

Transforming Your Business Results with Touchless Automation

Although it may seem daunting, transitioning from a manual to automated ordering process is simpler than you might think. Since Conexiom does the lion's share of the implementation and setup, your team is typically up and running in as little as 30 days.

Conexiom offers a proven process for configuring the information on every purchase order—regardless of format—while automating business rules regarding how that data should be configured into your ERP system.

Since the order-processing solution works in conjunction with customer service during initial setup, detailed business rules can be defined, captured, and incorporated into the solution. This tribal knowledge becomes part of the automation framework, and no longer exists solely inside your CSR team's depth of experience.

To manage order complexity, Conexiom uses proprietary algorithms, machine learning (ML), and artificial intelligence (AI) to ensure data is captured and transformed with 100% accuracy.

Standard Electric implemented Conexiom and accelerated its order-processing speeds by 88% with 100% accuracy.

Getting Started with Sales Order Automation

As an easy-to-implement cloud-based automation platform, getting started with Sales Order Automation is painless, as the heavy lifting is done by Conexiom onboarding specialists.

1. Select a group of trading partners (customers).
2. Work with dedicated account managers to create accounts for each trading partner.
3. Submit a collection of recent POs for each trading partner.
4. **Configure relevant PO data to where you expect** to see it in your ERP environment.
5. Define business rules for notifications and exception handling.

And just like that, Conexiom transforms purchase orders into sales orders in your ERP environment within 2 minutes. Regardless of complexity, variability, or how it's received, the PO's data is delivered as a sales order in your ERP system with 100% accuracy.
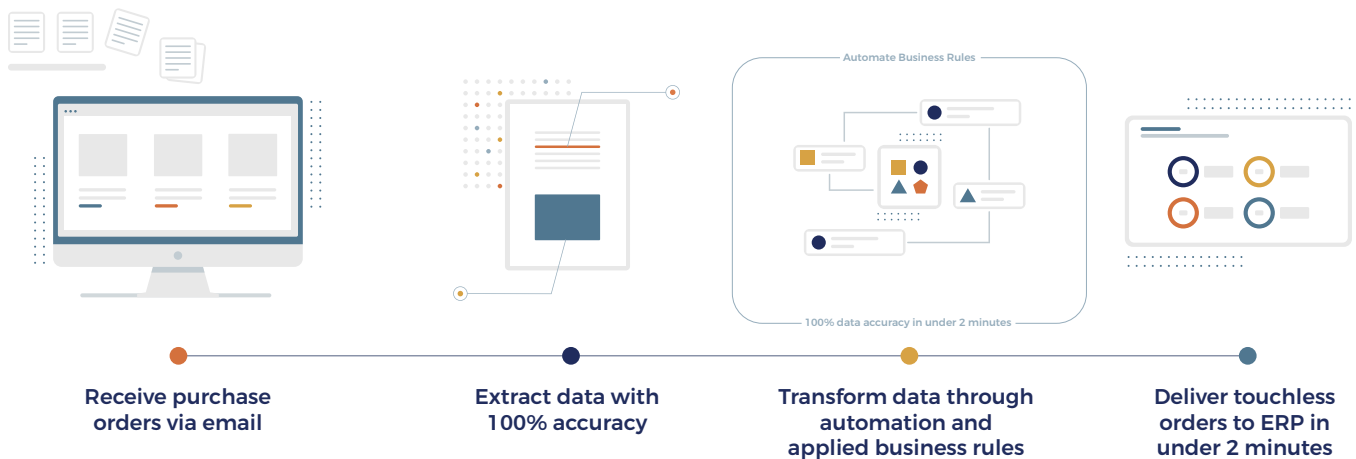
Just Like EDI, Only Better

Sales Order Automation works similarly to EDI, with the added benefit of not having to force customers to change their business operations. With Conexiom, distributors and manufacturers can leverage the existing EDI infrastructure by treating email, punchout, web portal, and print/fax orders just like standard electronic documents.

No changes are required to business practices for either the company or its customers. Even better, Conexiom handles an unlimited number of PO formats from various trading partners.

Delivering True Automation: How It Works

Conexiom delivers Sales Order Automation with 100% order accuracy, applying specific business rules and logic so orders are touchless, digital, and processed within minutes.

Receive purchase orders via email → Extract data with 100% accuracy → Transform data through automation and applied business rules → Deliver touchless orders to ERP in under 2 minutes

With Sales Order Automation, POs can be delivered to ERP systems in 2 minutes.

1. Once implemented, Conexiom allows companies to treat email and print/fax orders like standard electronic documents from an EDI solution.

2. Conexiom Sales Order Automation captures data from a customer PO with 100% accuracy, regardless of the format or complexity.

3. Using a sophisticated configuration process, data flows into the company's ERP system using a preferred file format.

4. Conexiom automatically transforms and processes the order, applying the precise business rules required by customers.

5. New customers can be enrolled into Conexiom quickly, enabling non-EDI customers to enjoy the same benefits as EDI users.

6. Using a proven implementation process, your trading partners see immediate results, such as more accurate orders delivered in a shorter cycle.

Automated Order Processing in Action

Honeywell and Graybar are just two of the organizations that turned their customer experience into a competitive advantage and protected new and existing revenue by using Conexiom.

Honeywell

Graybar

Background

As a Fortune 100 company, Honeywell sought to enable omni-channel engagement and deliver value to its business through improving the customer experience and reducing costs.

Looking to eliminate the manual effort required with order entries as well as reduce operational costs through technology, Honeywell first tried RPA and OCR technologies, but were not able to meet their digitization goals… until Conexiom.

Results

▸ Reprioritized the customer service function to deliver best-in-class customer service

▸ Transformed all fields in POs with 100% accuracy

▸ Increased the amount of touchless orders

▸ Provided seamless omni-channel customer experience

▸ Reduced costs

Background

As a Fortune 500 company, Graybar is a leading North American distributor of high-quality equipment and materials. To remain a top competitor, Graybar must be lean and efficient to keep costs low and pass those savings to its customers.

Looking to implement technology to free up CSRs' time for value-added work, Graybar enlisted Conexiom.

Results

▸ Reprioritized the customer service function to deliver differentiated customer service

▸ Saved a minimum of 15 minutes processing each order

▸ Reduced costs

Compete to Win with Conexiom

Thanks to the Amazon Effect and many other competitive forces in the marketplace, wholesale distributors and manufacturers across numerous verticals are more vulnerable than ever to pricing transparency and margin compression.

At a minimum, these companies must fulfill orders with precision, accuracy, and immediacy. They must deliver an outstanding customer experience to prevent losing business to competitors who can.

This is why hundreds of manufacturers and distributors rely on Conexiom to process millions of documents annually. That's thousands of documents per minute globally.

Conexiom delivers a cloud-based automation solution that uniquely enables businesses to protect and grow revenue by elevating the customer experience while reducing the cost to serve.

Learn more at Conexiom.com.

> "With Conexiom, we are over 400% in ROI based on our current automation of order entry."
>
> **Oliver Marcel**
> **Customer Success Manager**
> **Compugen, Montreal**

About Conexiom

Conexiom's cloud-based automation platform eliminates manual entry and approvals in the order fulfillment process by transforming complex data into 100% accurate, touchless transactions, delivered seamlessly into the ERP. Manufacturers and distributors across the globe, such as Grainger, Genpak, Prysmian, Rexnord, USESI, and Compugen, trust Conexiom to improve efficiency, speed and accuracy, increase profitability, and elevate the customer experience, while eliminating unnecessary costs from manual approaches.

Learn More

Conexiom is based in Vancouver, British Columbia, and has offices in Kitchener, Ontario; London, England; and Chicago, Illinois. For more information, visit Conexiom.com.