

COLLECTIONS MANAGEMENT  
ORDER MANAGEMENT  
CUSTOMER INQUIRIES MANAGEMENT



# LEVERAGING MULTIPLE SOLUTIONS TO OPTIMIZE EFFICIENCY & GROWTH

Creating a streamlined enterprise with Esker's Customer Inquiries Management, Order Management & Collections Management automation solutions



## AT A GLANCE

# Palmer Holland



Distributor of specialty chemicals and ingredients



155 employees



4 companies with 1 collective headquarters



Sage X3

## CHALLENGES

Streamline manually intensive processes to gain efficiencies & meet growth goals

Palmer Holland is a North American specialty chemical and ingredient distributor of raw materials, and from a growth standpoint, the company is booming. In order to maintain and promote further growth without having to grow headcount, Palmer Holland decided to automate its most manually intensive processes with Esker: customer inquiries management, order management and collections management. "Part of our vision is to improve processes by subtraction, and to leverage automation wherever possible," said Charlie Laurie, CIO at Palmer Holland.

Prior to automation, email was heavily relied on for process management and customer inquiries, with one employee dedicating at least four hours a day to routing emails to CSRs. Its order management process was also challenging and required CSRs to check many boxes just to enter an order.

Palmer Holland's collections process used to demand constant back-and-forth communication with customers and didn't offer a way for customers to make ACH or credit card payments, creating significant slowdowns when collecting cash. Luckily, Esker's suite of AI-driven solutions was able to address the biggest obstacles affecting Palmer Holland's process efficiency.

## OBJECTIVES



Leverage automation as much as possible to streamline processes



Support company growth while balancing headcount growth



Drastically reduce time spent on customer inquiries and data entry



Accelerate collections by making customers more self-sufficient



**It replaces a lot of manual order entry for CSRs, so they've been able to get that time back in their day. Now they can just focus on managing the orders in our ERP system instead of validating them. Esker has been very helpful in that regard.**



**Alza Toor**  
Customer Service Manager, Palmer Holland

# SOLUTION

## Utilizing automation as much as possible

With the AI-driven functionalities provided by Esker's Customer Inquiries Management, Order Management and Collections Management solutions, Palmer Holland is on the fast track to reaching its performance and growth goals.

Using automated inquiry classification and routing, the Customer Inquiries Management solution provides CSRs a collaborative platform to triage and analyze all 5,000 of Palmer Holland's monthly customer requests quickly and easily.

The Customer Inquiries Management solution seamlessly integrated with Esker's Order Management solution to accurately route order-related questions and eliminate the time-consuming data entry once required by CSRs. Esker's deep learning capabilities greatly simplifies the order entry process by recognizing similar order layouts.

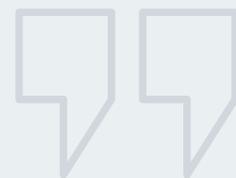
Esker's Collections Management solution provides the visibility needed to manage Palmer Holland's receivables and collect cash faster — including an online self-service portal that offers customers a convenient way to make ACH and card payments, ask questions, apply credits and more, all in one place.

Palmer Holland also elected rapid deploy implementation, which aligned with its desire to move faster and grow quicker.



**"It takes maybe a second or two to validate an inquiry now. The time savings is one of the biggest benefits."**

**Alza Toor**  
Customer Service Manager, Palmer Holland



# RESULTS

## Doing more with less thanks to AI-driven automation

By implementing three of Esker's automation solutions, Palmer Holland has seen transformation benefits that are contributing to significant time savings and helping to propel company growth. After automating customer inquiries, routing emails now only takes four hours a week, as opposed to four hours a day. This can be attributed to the fact that Esker's quick-learning AI Engine is classifying inquiries correctly over 90% of the time.

Esker's AI recognition has been a highly valuable player for order management as well. Almost all need for manual intervention has been eliminated, as 96.8% of orders are identified correctly by the solution. Palmer Holland has also begun auto-processing orders for several customers and is looking to enable auto-processing for a much larger subset of customers in the future.

As for collections management, the online portal has allowed Palmer Holland's customers to become more self-sufficient. In fact, the company has processed approximately \$1 million in self-service payments. Now that customers can pay and ask questions online, the Collections Specialist has more time to focus on higher-value tasks. The reporting capabilities of Esker's Collections Management solution provide greater insights into receivables data and have led to significant time savings, as creating a report would require hours of research and data collection prior to automation. And even as the company grows, still only one full-time employee is needed to handle all collections.

Additionally, Esker's intuitive interface allows for easy onboarding of new CSRs or other team members, and simplifies training for customer inquiries management.



**We have a monthly meeting to discuss collections activity on certain key accounts, and Esker's ability to instantly pull that information for our reports has been a game changer for us. It's all right there.**



**Amber Twarek**  
Credit Manager,  
Palmer Holland

# Want to automate your key business processes like Palmer Holland? Our team is at your service.

GET IN TOUCH WITH ESKER

**ABOUT ESKER:** Esker is a global cloud platform built to unlock strategic value for finance and customer service professionals, and strengthen collaboration between companies by automating the cash conversion cycle. 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.

Our customers use our cloud solutions to increase the efficiency, productivity and visibility of their Purchase-to-Pay (P2P) and Order-to-Cash (O2C) processes.

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