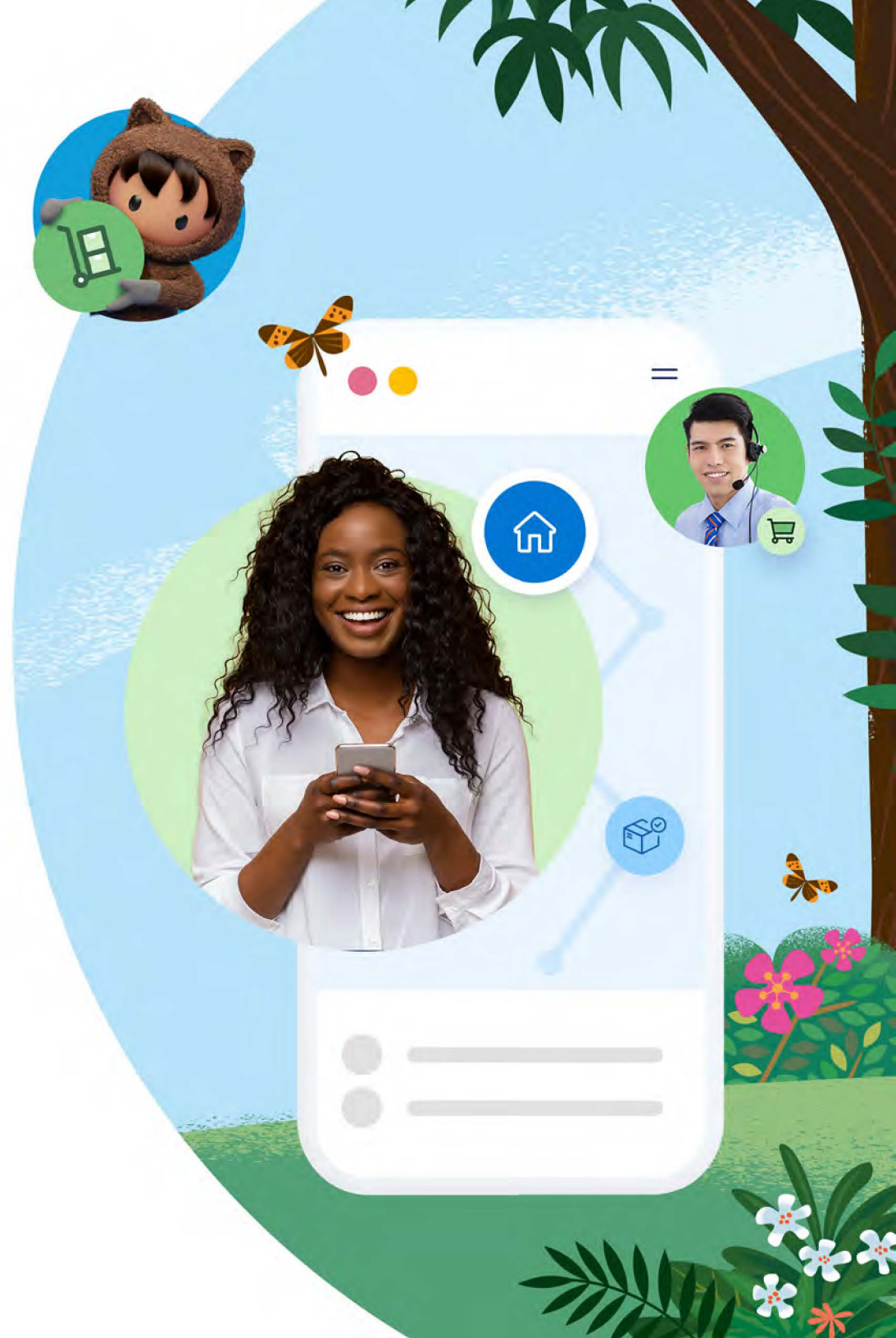


salesforce

# Beyond the Buy Button

How Order Management Helps You Connect with Customers and Keep Them Coming Back



# Meet customers wherever they are.

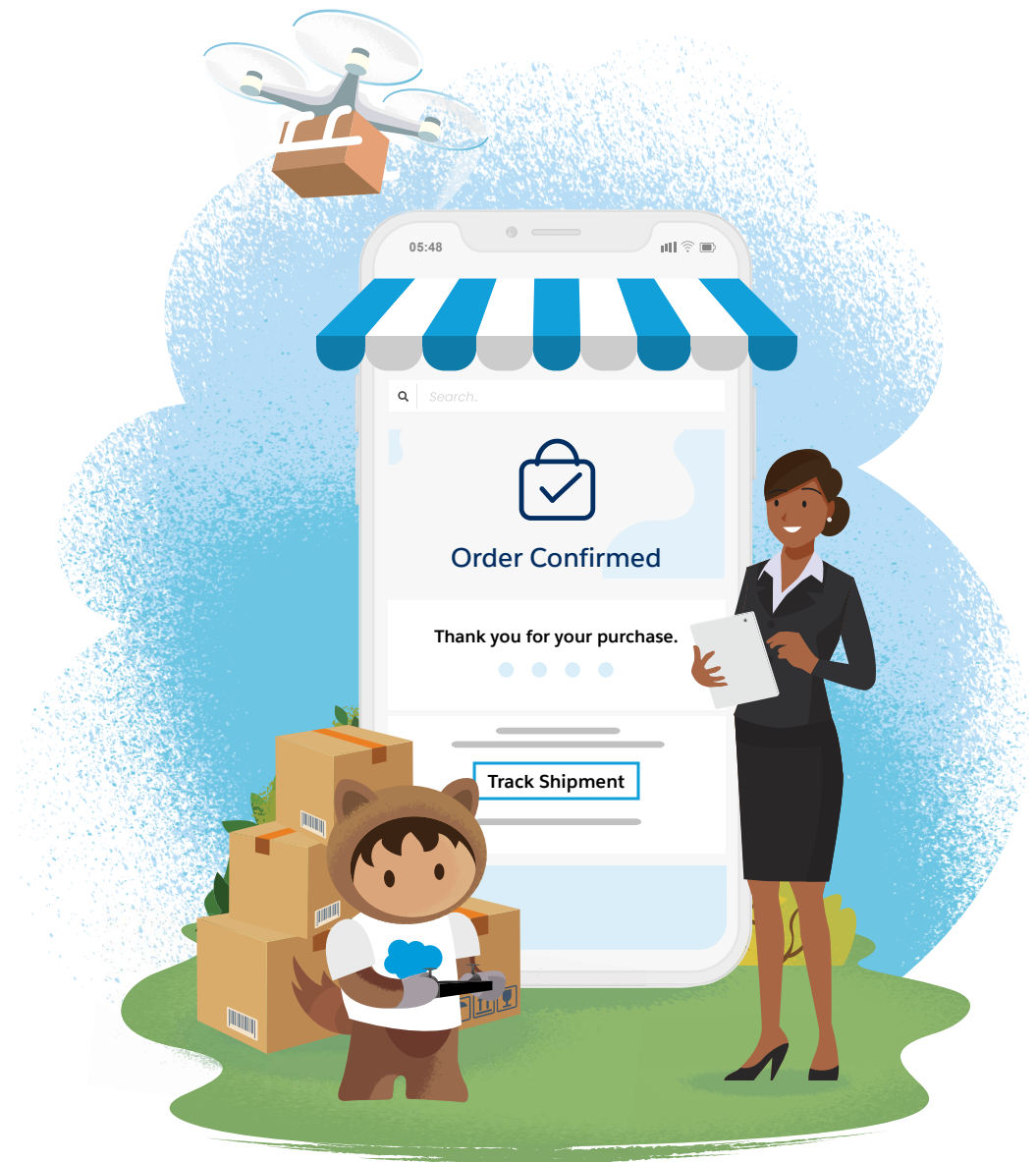
The global pandemic has changed the way that businesses and buyers interact with each other. With more people purchasing on digital channels (for both business and personal items), the post-purchase journey has never been more important.

Ordering and fulfillment have always been at the heart of exceptional customer experiences. Customers want to receive products on time and on their terms. That may include same-day shipping or picking up an item from a physical location. Whatever they choose, customers want visibility and real-time updates every step of the way.

This is increasingly true today as digital behaviors accelerate. In this guide, learn how order management plays a key role – from marketing to checkout to fulfillment to service.

## Let's get started.

<b>Learn the Tenets of Order Management</b> .....	03
<b>Create a Unified Experience</b> .....	04
<b>Make Your Business Case</b> .....	05
<b>Create Your Roadmap</b> .....	07



# Learn the tenets of order management.

Customers expect a seamless post-purchase process from checkout to delivery. Here are four ways you can meet customer expectations.

## 1. Make order servicing easier.

Customers want seamless experiences, so it's important to integrate commerce, service, and sales. When possible, bridge the gap between disparate systems. Connected systems unify data and give agents complete visibility so they can serve customers faster and more accurately. Agents can help customers with:

- Order status
- Nearby stores, showrooms, distribution centers, or other pickup options
- Order modifications
- Merchandise returns

## 2. Offer flexible shipping and delivery.

Seventy percent of companies have lost business due to order-specific pains. Therefore, providing flexible options is key to earning customer trust and loyalty. Offering various fulfillment options – like shopping by local inventory, curbside pickup, or click-and-collect – is key to winning and keeping customers and buyers. And integrations with [third-party vendors](#), such as tax, shipping, warehouse management, and payment, can help you achieve the flexibility that customers and buyers appreciate. In fact, companies that offer the option to [buy online, pick up in store \(BOPIS\)](#) grew digital revenue by 127% year over year in Q2 2020 compared with 54% for those without the option.<sup>1</sup>

<sup>1</sup> Q2 2020 Salesforce Shopping Index

## 3. Enable self-service.

Meet customer needs and innovate on new channels by offering self-service. Chatbots and artificial intelligence (AI) help automate service processes, which in turn improves agent productivity and empowers customers to:

- Check on orders
- Receive order updates on preferred channels
- Modify or cancel orders

## 4. Manage the entire order lifecycle.

Powerful order management helps brands manage the entire order lifecycle. An extensible, agile order management system ensures customer satisfaction throughout the post-purchase journey. It tracks and manages orders from fulfillment to payment capture to invoice creation so that brands can:

- Customize business processes to ensure efficiency
- Unlock a unified view of the fulfillment process
- Gain data and insights to drive future decisions

## 5. Streamline inventory.

Create a single source of truth across all networks and distribution centers, so you can fulfill from anywhere with Distributed Order Management (DOM). Leverage DOM and a complete view of inventory across your network to improve post-purchase experiences. Offer fast, easy ordering to your customers. Increase profitability and skip inventory bottlenecks by optimizing for factors like speed to deliver or cost to fulfill.

# Create a unified experience.

Think of order management as the connective tissue between all of your systems. It handles complex order orchestration, and surfaces order information for service and sales agents. When information is available and accessible to everybody, you can fulfill orders fast and at scale – a win-win for brands and customers.

## **Unlock real-time order status updates.**

Couple order management with integrations into other systems for a complete view of customers and products. APIs connect into ERPs, CRM, and POS systems to access order data and expose it to business users. These APIs include order cancellations, order fulfillment, invoice creation, payment capture, and refunds.

## **Configure workflows and microservices with ease.**

Configure workflows and leverage microservices to meet your needs with less code. Enable back-end teams and admins to quickly build and manage supply chain workflows with drag-and-drop tools. Easily segment inventory for specific storefronts, add/remove locations from active storefront counts, and add in steps or split fulfillment options.

Handle even the most complex business processes and optimize every store with proximity-based routing logic. Bring distribution center, warehouse, showroom, and retail inventory locations into one unified network. Bring all of it together with an extensible platform that can be customized and integrated with other partners.

## **Engage with customers and buyers globally.**

Connect to your customers anywhere with personalized interactions on a global scale. Use localization capabilities to support multiple currencies

and languages. Enlist workflows customized by region. Further accelerate time to market by tapping into a global ecosystem of partners.

## **Empower your service and sales teams to respond quickly.**

By connecting commerce, service, and sales, agents and sales reps are better equipped to handle cases quickly and efficiently. With customer data and order information on one screen, they can save time locating order details – so they can spend more time on inbound inquiries.

## **Create processes that enable you to rapidly adapt and scale.**

Agile order management gives companies the flexibility to scale quickly and the security to be successful across markets. When it's built on a platform with years of proven trust and innovation, everything runs smoothly. Teams dedicated to the platform focus on innovation and hone updates and new features to meet changing market needs.





# Make your business case.

There's no one-size-fits-all approach to order management. Center your strategy around your brand, customers/buyers, and goals. Most importantly, define the experiences that will resonate.

## Focus on key business drivers.

As customers use more digital channels, evaluate your priorities. A more flexible system offers broad benefits.

### Customers/buyers can:

- Buy on the channels they prefer without any glitches
- Have personalized post-purchase experiences because an agile platform unifies data
- Get transparency from checkout to fulfillment, which builds trust and loyalty
- Get help on their terms with self-service returns and the ability to check order status or update information

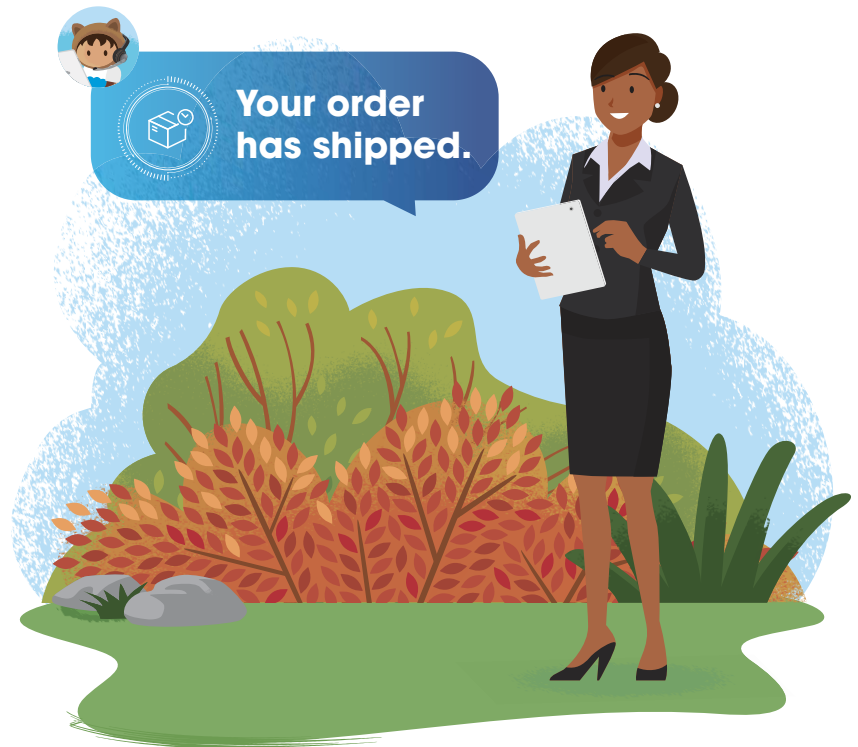
### Companies can:

- Connect commerce, sales, and service for a unified commerce strategy
- Unlock inventory across complex distribution networks to sell more efficiently
- Turn stores into distribution centers and reduce markdowns by selling in-store inventory online
- Empower agents to seek cross-sell and upsell opportunities by turning a one-way message into a transaction or recommendation
- Enable self-service to reduce costs and free reps and agents to focus on more complex cases and sales

- Engage across the post-purchase journey on new and existing digital channels and gain a competitive advantage by offering omni-channel experiences

## Envision the future.

Have a forward-looking plan. With key business drivers in mind, focus on the ideal post-purchase experience from a technical and business perspective. Consider the different areas of your business that this project may impact.



# Make your business case. (continued)

## Align stakeholders.

Collaborative executive leadership provides direction, guidance, and enthusiasm. Present the benefits of order management to gain alignment and buy-in.

## Define roles and responsibilities.

Determine your team's expertise and areas in which stakeholders should provide support. Build your team with the following resources:

- A **strong project manager** to lead your team and coordinate internal groups and partners
- A **technical architect** who knows your current systems and data models and can help define your architecture and data migration
- **Order, fulfillment, sales reps, and customer service experts** who are on the front lines with customers – they know your internal processes and can share pain points to help you find the best solution

## Communicate updates and results.

Create a regular communication cadence and notify stakeholders of updates throughout the implementation process. Reiterate how the experience will evolve after the project to manage expectations.



# Create your roadmap.

Use this roadmap to support your digital-first strategy with order management.

## 1. Assess your current order management capabilities.

How does your current experience stack up? Are you providing the options that customers want?

## 2. Collect and align priorities across commerce, operations, store management, marketing, sales, and service.

Evaluate your existing order management system with your cross-company goals.

## 3. Anticipate what your customers want.

Look at your data to understand what customers are looking for. Is there increased demand for in-store or curbside pickup? How are customers interacting with agents across channels?

And if you're in B2B, consider how quickly your buyers need a shipment to arrive to their business and what warehouses within region have inventory available.

## 4. Benchmark current metrics.

Capture KPIs such as inventory turn, customer satisfaction, order processing cycle time, inventory accuracy, carrying costs of inventory, and inventory turnover.



# Create your roadmap. (continued)

## 5. Make your plan.

Factor in seasonality, new stores/showrooms, inventory, and training lead time. Map out what features you're going to deliver, such as real-time order status updates. Evaluate order management providers to see how quickly you can deploy them.

## 6. Implement your new capability.

Go to market quickly with best-in-class order management to help with acquisition, conversion, and service.

## 7. Train team members.

Ensure your provider offers consultative services to help your team learn new processes. Train teams fully before launching or publicizing new omni-channel offerings.

## 8. Pilot your program.

Start slow and collect learnings. Then expand to new stores, regions, products, or audiences.

## 9. Measure success.

Look at your data against your benchmarks. Keep tabs on what's working and track how long it takes to see ROI.

See ways you can meet customer needs and streamline the entire post-purchase process with [Salesforce Order Management](#).

