



# BEST PRACTICES

A Collection of Best Practices for:

# Order Management

*Includes Detailed Best Practices for:*

- Order Processing
- Return Processing



# Table of Contents

## Order Management Best Practices

---

### Order Management Best Practices

Order Processing ..... 2

Return Processing ..... 10

*This content may not be copied, distributed, republished, uploaded, posted or transmitted in any way without the prior written consent of OpsDog, Inc.*

# Order Processing

---

## Order Management

**Order Processing**

Return Processing

— The Order Processing function is the first step in the order-to-cash process. Orders are received through a variety of channels, including phone, fax, online (eCommerce), email or face-to-face (a dying channel). The Order Collection and Entry function is responsible for accurately collecting and recording customer order information and then passing it off to the production, packaging and shipping groups.

# Order Processing

## Order Management Best Practices

---

### Best Practice 1-A

#### **Provide Incentives to Purchase Company Products Through Online Platforms to Improve Customer Experience**

Provide incentives (i.e., discounts, bundle saving deals, etc.) to potential customers to purchase the organization's products through online and mobile platforms to reduce the need for more costly manual oversight and processing by Order Processing employees (this can also include representatives from other functions such as the Sales, Call Center and Customer Service departments), thus freeing them to perform other tasks. Use simple and easy to understand e-commerce best practices (simple payment information form, frequently asked questions area, live chat, etc.) to make the online purchasing process seamless and efficient. Ensure that detailed and consistent product information is available across all channels and devices (i.e., brochures, booklets, computer and mobile-friendly online sources, etc.).

**Typical Practice (the Status Quo):** Offer potential customers the ability to purchase the organization's products through multiple channels (walk in purchases, online purchases, phone call purchases, etc.). Answer any and all inquiries asked by customers and use a standardized script that details concise and easily understandable answers to the questions that are asked most often.

**Benefits of this Best Practice:** By improving the online user experience as well as the quality of online information content related to the organization's products and service options, organizations are better able to provide potential customers the convenience to purchase products through online/mobile channels. This convenience, as a result, instills both confidence and satisfaction in potential and current customers. Furthermore, encouraging customers to purchase products through online and mobile channels (whether by divulging such information through telephone or email contacts) not only allows potential customers the opportunity to conveniently research and compare products to choose the one that best fits their needs, but also eliminates manual processing and excessive customer interactions during order processing, thus freeing up the organization's Order Processing employees and other customer-facing representatives (i.e., sales, call center and customer service representatives) to complete additional high-value tasks.

 **Related KPIs:** Cycle Time: Customer Order Processing, Shopping Cart Abandonment Rate, Electronic Transaction Expense as a Percentage of E-Commerce Sales

# Order Processing

## Order Management Best Practices

---

### Best Practice 1-B

#### **Triage Customer Request Resolutions Based on Request Priority to Improve Customer Experience**

Develop and enforce the use of request prioritization guidelines to categorize customer orders throughout all contact channels and determine when new, high-priority orders or requests supersede lower-priority aged orders. Use standardized checklists to describe, in detail, all known request and order types by priority so as to allow employees and managers to quickly take action to process high-priority requests and orders. This not only reduces overall customer dissatisfaction, but by quickly processing high-priority orders, the Order Processing function is able to maximize the number of orders processed and reduce overall loss of revenue (especially if the request originates from a repeat and/or high-value customer).

**Typical Practice (the Status Quo):** Implement a "first come, first serve" approach to handle incoming customer orders (includes orders originating from all customer contact channels). This ensures that customers are handled by the first available call center, customer service or order processing representative, thereby reducing customer hold times and abandonment rates while increasing customer satisfaction and loyalty. *(This is the current status quo for most companies.)*

**To download the full document,  
add this product to your shopping cart  
and complete the purchase process.**

