

# CHANGE MANAGEMENT AND AUTOMATION:

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Gaining Buy-In And Smoothly  
Implementing Change In Your  
Workforce



## CHANGE MANAGEMENT AND AUTOMATION: GAINING BUY-IN AND SMOOTHLY IMPLEMENTING CHANGE IN YOUR WORKFORCE

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Today, there's a lot of buzz about AI and automation in the workplace. Yet because accounts payable has traditionally been a very manual process, it's common for AP teams to think, "Why should we change our processes when the ones we're using have always worked?"

Here's why: While manual invoice matching, exception handling, approval routing and paper check remittances may be working effectively, there's a difference between efficiency and effectiveness. Yes, the work is getting done, but is it getting done as quickly and smoothly as it could be? For those doing the work manually, the answer is invariably no.



According to the World Economic Forum, 1.1 billion jobs will be transformed by tech in the next 10 years.

That's a problem in the current business climate. The push to get work done efficiently has never been greater, with executive leadership looking for new ways to boost

productivity while cutting costs. While this seems like the perfect reason to embrace change, there can be reluctance from business leaders who may worry about disruption and its impact on ROI during an implementation. In addition, AP teams may fear that automation will replace them. Even among those that understand the issues that come with manual processing—and most of them certainly do—the “let's leave well enough alone” attitude may prevail.

It's crucial to break through this fear-driven mindset, because, ultimately, a workplace that's resistant to change at any level will wind up being replaced by one that isn't. After all, automation won't replace you, but a person or team that uses automation will.

Yet for optimal results, well-planned change management is essential to successful transformation of the AP function. Engaging your team is an ideal place to begin.

# Staff Buy-In

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A first step in effectively preparing teams for new procedures and technologies is by facilitating a paradigm shift in your workforce.

“It’s essential to break through the mindset that automation will create obstacles to getting the work done, when the exact opposite is true,” says Kolleen Doucette, Vice President, AP and Payments Automation at onPhase. “The key is in understanding how to introduce and manage that change.”

“It’s important to engage staff from the beginning of the automation process,” adds Royce Grayson Morse, IOFM’s Managing Editor. “Involving them early on lets them know what to expect, that the process doesn’t need to be scary. They need to know that their input is highly valuable to the success of the project and be able to follow along as it evolves.”

Gartner data indicates that only a quarter of employees are able to change how they work when uninvolved in an implementation, even when they have the necessary skills.



IOFM recommends you start by creating a workflow diagram of your existing processes. This **flowcharting** exercise

encourages your team to think about how they do what they do, which helps you identify and map out each of the steps you plan to automate. Diagramming your workflow can also encourage discussions about bottlenecks that slow down the approval and payment process and create workarounds, increasing the opportunity for error.

IOFM suggests that before automating, you identify any major problems that exist within the manual workflows. Understanding where you need the most help can enable you to optimize your implementation early on. Asking the team for their input at this stage also shows you recognize their ownership of the process and can spark their interest in substituting actual solutions in



AP employees who worry that they will need to relearn their jobs due to automation are likely to be highly resistant to change.

place of the old manual workarounds.

One very legitimate concern of many AP teams is that automation will require them to completely relearn their jobs. This may make them resistant to the implementation, but it doesn't have to be that way, notes Doucette.

“When choosing an automation solution, look for one that's highly configurable so that the process can be customized to the way you're used to working,” she says. A solution that uses a rules-based engine, for instance, can be adapted to your needs without custom development—and who knows your needs better than you and your team do?

Furthermore, a cloud-based solution not only eliminates the need for an on-site implementation team and costly in-house servers, but also provides remote team members with full access to the organization's software and data.

This makes the change to an automated solution not only easier, but much more appealing. The ability to work and collaborate from anywhere is a definite perk that can help get the AP team onboard with the transition. In fact, a [recent McKinsey survey](#) revealed that nearly nine out of 10 people who are given the opportunity to work flexibly take it.

Ultimately, the messaging should be clear that the goal of automation is to make people more effective and their jobs easier. IOFM recommends considering a solution not as a means to reduce staff, but as an opportunity to automate the clerical duties of AP that hinder teams from engaging in higher-value services. This includes eliminating tasks like chasing approvals for payments or manually keying in invoice line items.

Automation will enable AP teams to instead focus on capturing early pay discounts and analyzing the organization's spending habits using the data provided by the solution. Better coordination with procurement and enhanced vendor relationships are other benefits staff can focus on without the burdens of pushing paper around and fighting with broken processes.

# Communicating Up the Chain

While communicating with the AP team about the positive changes automation can bring them, it's also important to loop in upper management. Staff members are focused on a manageable process and ease of use, but your executives will be most concerned about the return on their investment and how greater efficiency can offer their business a competitive edge.



Effective change management requires you communicate openly, both up and down the chain of command.

Business leaders are likely to be concerned that an implementation will introduce payment delays during the transition, which can affect the supply chain and cause the business

to miss out on early-payment discounts. In reality, the opposite is true. A smooth implementation will allow better timing of payments, which is key to discount capture and happy suppliers. It's also important for leadership to understand that automation provides scalability over time, alleviating the need to hire more staff as the business grows.

As you gather feedback from practitioners in your fact-finding process, use that information to create a compelling business case for upper management's approval. Once you have engaged all the stakeholders and acquired information about their needs, goals and concerns, you'll be ready to create a **request for proposal** (RFP) that clearly outlines those objectives.

Then, research the various providers and select a handful that appear to meet your criteria. You'll want to request demos to get a full understanding of how their solutions work and whether they will facilitate a smooth transition with minimal disruption. Again, engage with the AP team to get their input and buy-in.

Once you have done your research, narrow down your vendor pool to those who best understand your organization's current and future



The right solution provider will work with your existing processes to make them smoother.

growth needs. Do they “get” how you do business? Will their solution be adaptable to your systems and processes as your business grows and evolves, or will you need to make ongoing changes to your way of working?

While cost is also a factor, don't be short-sighted and look at the initial outlay only—you'll want to factor in the opportunity costs down the road as well. An out-of-the-box solution that seems affordable today may not meet your future needs and end up costing you more in the long run. “Look at the bigger picture,” advises Morse. “You're not only solving today's problems. You're investing in your future growth.”

Lastly, consider the implementation cycle time, what resources your organization will need to provide, and how much support the provider will offer during the transition to automation.

Once you've completed these steps, you'll be better prepared to present decision-makers with a compelling recommendation as to which solution best meets your organization's needs, minimizes disruption, offers a smooth transition, and ensures the fastest return on investment.

## Positive Change Throughout the Business

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As we've mentioned, successful change management requires engaged stakeholders, both up and down the chain. The goal is to ensure a smooth, effortless and profitable transition for everyone involved in the accounts payable process, whether they are part of the AP team or not.



If your automated workflow incorporates the best parts of your existing manual processes, the transition will create minimal disruption and staff will adapt quickly.

To optimize the change that automation brings, It's important to view your solution provider as a partner. While there will always be some degree of learning associated with a new solution, your software vendor should be supportive,

making it a point to understand how you work and helping to make the transition as seamless as possible. An essential part of your research process should involve asking about the vendor’s approach to helping with change management.

“If your automated workflow incorporates the best parts of your existing manual processes, the transition will create minimal disruption and staff will adapt quickly,” notes Morse.

“The right provider can definitely facilitate this.”

Another key consideration when evaluating AP vendors is whether their solution integrates with your current ERP— either through true integration, API or flat files. IT teams are definitely stakeholders in this process and will want to ensure appropriate security and a seamless integration. If the solution you’re considering is cloud-based, IT teams can rest easy, knowing they don’t need to have staff managing the application.



Children’s Home Society of Florida discovered that hosting in the onPhase cloud greatly simplified their

They won’t have to worry about installation, maintenance, security and software updates. All of that is handled by the solution provider, and remote AP staff can easily be set up

without custom installs, special equipment or risk management concerns.

Procurement will be happy that they are able to communicate notes for any quantity deviations and other special allowances— things that would normally require them to send emails to AP and then hope for the best.

Your solution of choice should also include communications that facilitate collaboration and real-time insights into workflows. For example, approvers should receive notifications of pending invoices within the app, with their approvals documented and automatically forwarded to the next recipient. This eliminates the need for them to handle multiple emailed attachments, having to remember to review and approve them manually, and then taking the time to send them on to the next approver.

Management will also have greater control over how the work gets done by way of a prioritized work queue and enhanced visibility into task statuses.

**Lockheed Martin**, a global security and aerospace company, discovered the

benefits of onPhase's built-in workflow automation by assigning work to the team only when all the necessary information was available. This not only saved them time, but afforded insights into any bottlenecks within their processes.

Finally, executives no longer have to worry about slow payments that impact the bottom line, delays that can be exacerbated by organizations with multiple locations that must move physical paper around or depend upon email chains to transmit information.



Pharma company Alimera saw a 93% reduction in invoice processing times with onPhase's AP Automation solution.

## The Benefits of Well-Managed Change

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The right automation tool provides benefits at all levels of the organization.

For executives and managers, that includes the ability to capitalize on early pay discounts and rebates, gain greater insight into the company's finances, retain staff who would prefer to work remotely, and handle additional volume to grow the business without having to invest in more workers.



Automation provides executives and managers far greater insight into the company's finances and process efficiency.

Further benefits of incorporating automation into your processes are enhanced compliance and risk management. Electronic records can be securely maintained throughout the required retention period and

beyond. Integrated document management can further enhance this benefit by eliminating the need for messy filing cabinets and reducing the risks associated with physical document storage.

Within the AP department, good change management techniques can defuse staff concerns about losing their jobs or having to radically change how they do them. Instead, a flexible workflow can parallel processing methods they're already familiar with, and will free them up to learn new, more interesting tasks that don't involve pushing paper all day.

Another great benefit is that vendor relationships will be enhanced with smoother, more punctual payments, and staff will have the bandwidth to communicate with suppliers to ensure those partnerships remain strong at a time when supply chains can be unpredictable.



Carefully considered change management is essential to a successful, profitable automation implementation.

This is achievable with the right software, a carefully planned implementation, and communicating openly with all stakeholders throughout the process. Automation

is here to stay, and it's a boon to everybody involved in the supply chain, from vendors to AP practitioners to executives.

“For organizations that are either in growth mode or looking to tune up processes that no longer work well, the right automation is absolutely essential,” says Morse. “But in order to reap those benefits, well thought-through change management is key.”

Doucette agrees, adding, “Customers have shared that although change can be daunting, it presents an opportunity to enhance their business processes and achieve better outcomes. The opportunity cost of implementing a new solution has been more than worth it. Our customers have reported significant improvements in their bottom line, while realizing reduced errors and a more streamlined workflow. They now have more time back in their days to invest in growing their businesses and providing better customer experiences.”



## Who is onPhase?

onPhase is a leader in financial automation and payments solutions, delivering an all-in-one platform designed to modernize operations, improve efficiency, and help businesses thrive. Our intelligent platform integrates AP Automation, Payments, Document Management, Online Forms, and Workflow Automation, enabling finance teams to streamline processes, reduce manual work, and gain real-time visibility into financial operations.

We empower CFOs and finance teams to automate the entire invoice-to-pay cycle, enhance supplier relationships, and ensure greater financial control. By digitizing and streamlining back-office operations, organizations can reduce costs, accelerate approvals, and minimize errors—allowing teams to focus on strategic growth rather than paperwork.

Built for modern businesses across industries, our scalable solutions integrate seamlessly with existing systems, adapting to the unique needs of each organization. Whether it's a small finance team looking to improve efficiency or a global enterprise seeking enterprise-grade automation, onPhase provides the tools to drive productivity and financial transformation.

[Learn More](#)

# About the Institute of Finance & Management

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Accounting and finance professions have each undergone nothing short of a complete transformation since the Institute of Finance and Management (IOFM) was founded in 1982 and since then our mission has been, and continues to be, to align the resources, events, certifications, and networking opportunities we offer with what companies need from the accounting and finance functions to deliver market leadership. IOFM empowers accounting and finance professionals to maximize the strategic value they offer their employers.

Our enduring commitment to serving the accounting and finance professions is unmatched. IOFM has certified over 25,000 accounting and finance professionals and serves several thousand conference and webinar attendees each year.

IOFM is proud to be recognized as the leading organization in providing training, education and certification programs specifically for professionals in accounts payable, procure-to-pay, accounts receivable and order-to-cash, as well as key tax and compliance resources for global and shared services professionals, controllers, and their finance and administration (F&A) teams.



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