

Making the Case for AP Automation



Are You Prepared to Transform Your Accounts Payable?

Before you pitch AP automation to leadership, it's critical to understand where your team stands, what the opportunity looks like, and how to communicate its value effectively. This checklist is designed to help you:

- Identify and quantify pain points
- Gather the most persuasive data
- Customize your case to key stakeholders
- Confirm readiness for implementation

Use this resource to prepare your internal pitch, build momentum for change, and ensure you're set up for a successful conversation with leadership.

Step 1: Pinpoint the Pain

Identify Signs Your Process Needs Automation

- The organization relies on paper-based processes or email approvals
- Invoices are often delayed or lost in the current process
- Approval workflows regularly take days or even weeks
- Penalties have been paid due to late payments or duplicate invoices
- Early-payment discounts are frequently missed
- Audits create stress and uncertainty rather than validation
- Teams are spending more time on data entry than strategic work

DID YOU KNOW? Late payments cost companies an average of \$300K/year in missed discounts and late fees.



81% of finance professionals say manual AP tasks slow down operations and reduce accuracy.

Step 2: Gather Data That Drives Decisions

Quantify the Impact with Real Data

- What does it cost your team to manually key in invoice data every day?
(Multiply time spent per invoice × hourly wage × number of invoices per month)

- How much is paper, printing, and postage eating into your AP budget?
(Think: cost per invoice to print + envelope + stamp + storage space)

- What's the price tag when you miss an early payment discount?
(How often do you miss a 2% net 10? Multiply that by invoice amounts)

AP automation can reduce invoice processing costs by up to 80%.



62% of companies say they struggle to get visibility into their AP data before month-end.

Step 3: Tailor the Message to Each Stakeholder

One-size-fits-all doesn't win buy-in. Make sure to customize the case.

When presenting to:

CFO: Show 30-60-90 day ROI projections, cash flow forecasting benefits, and cost control

IT: Highlight ease of integration, minimal support lift

Ops/Procurement: Emphasize supplier speed, communication gains

Executives: Tie it back to scalability, agility, and operational alignment

DID YOU KNOW? Companies using AP automation report 3x faster approval times on average.



89% of CFOs are prioritizing digital transformation in finance—but many lack a clear starting point.

Step 4: Confirm Implementation Readiness

Make sure the foundation is in place for a smooth rollout.

- AP workflows are documented or in the process of being documented
- Internal project champions and sponsors have been identified
- Required system integrations (e.g., ERP, accounting software) have been noted
- Success metrics (e.g., time savings, faster approvals) are clearly defined
- Establish a specific implementation timeline with key milestones
- The team is prepared to scale AP operations without adding headcount

INSIGHT: AP teams save 17 hours/week by eliminating manual tasks.



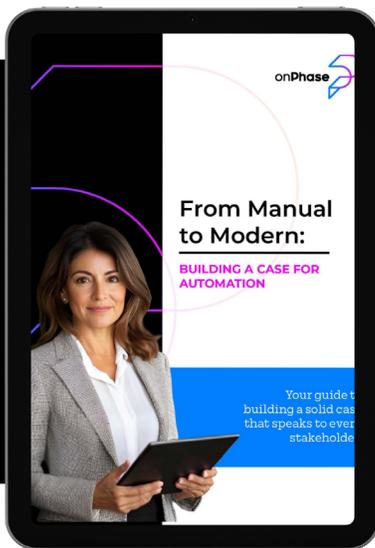
67% of automation projects succeed faster when success metrics are defined upfront.

Bonus: Are You Ready to Move from Planning to Action?

You're laying the groundwork for a strong case. Now it's time to start thinking about how you'll evaluate your options with confidence. Ask yourself:

- Have you outlined the critical functionality your organization needs today and what it may need tomorrow?
- Are you prepared to assess vendors not just on features, but on long-term fit, scalability, and ROI?
- Do you know which questions to ask during demos to uncover true capabilities?

Smart evaluation is key to turning your vision into reality.



To help you navigate this next phase with confidence, download our Building a Business Case Mini-Guide—which gives you the tools to articulate the value of AP automation and win support across your organization.

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