

From Manual to Modern:

**BUILDING A CASE FOR
AUTOMATION**

Your guide to
building a solid case
that speaks to every
stakeholder.



Manual processes aren't just slowing your AP team down. They are actively crippling your business potential. Every missed early payment discount, delayed insight, and burned out team member represents hidden costs that compound daily.



Finance leaders know there's a better way. AP automation isn't a future goal. It's an immediate opportunity to drive efficiency, reduce risk, and give your team the time and tools to operate strategically.

But even when the need is clear, getting buy-in isn't always easy. That's why this guide exists: to help you build a persuasive, data-backed case for change and show decision-makers exactly why now is the time to act.

COMPANIES THAT ARE AUTOMATING THEIR BACK OFFICE



2018
45%

2023
77%

Shifting the Conversation from Cost to Value

Automation transcends cost cutting. It reclaims valuable time, minimizes risk, and unlocks strategic opportunities your competitors are already leveraging.

The real cost of doing nothing:



The opportunity cost:

What could your team accomplish if they weren't bogged down by low-value tasks? Automation enables finance teams to:

- Focus on supplier negotiations and relationship building
- Deliver faster reporting and forecasting
- Improve collaboration across departments
- Support strategic growth initiatives

Connecting Automation to Organizational Goals

Automation doesn't merely patch inefficiencies. It accelerates the strategic initiatives finance leaders are already championing. Whether you're trying to increase control, gain visibility, or reduce compliance risk, automation can move the needle quickly.

Here's how it supports your most critical priorities:

Efficiency Gains

- Cut invoice processing time from days to minutes
- Eliminate manual data entry and reduce errors
- Route approvals automatically to reduce bottlenecks

Visibility & Control

- Access real-time views of cash flow and payment status
- Ensure every invoice is trackable with a full audit trail
- Standardize workflows across teams and locations

Compliance & Risk Mitigation

- Improve accuracy and consistency in records
- Reduce risk of fraud, duplicate payments, or lost invoices
- Simplify audit readiness with better documentation

Visibility & Control

- Free teams from low-value, repetitive tasks
- Make training and onboarding easier with consistent processes
- Boost morale by enabling more strategic, engaging work

Building Your Case

– Data, Dollars, and Direction

Once you've identified your pain points, it's time to quantify the opportunity. This is where you begin translating challenges into numbers, and numbers into action.

Below are key data points that can strengthen your case:

1. **Average cost per invoice:** Industry benchmarks range from \$5 to \$15 per invoice. Where do you fall?
2. **Monthly invoice volume:** Break it down by check, ACH, and credit card payments.
3. **Penalty tracking:** How much did late payments or errors cost your business last year?
4. **Labor time:** Estimate the number of hours your team spends on manual entry, chasing approvals, or resolving exceptions.
5. **Workflow touchpoints:** How many people are involved in processing and approving each invoice?
6. **Time reallocation:** If you could recover 10+ hours per week, where would you reinvest that time?

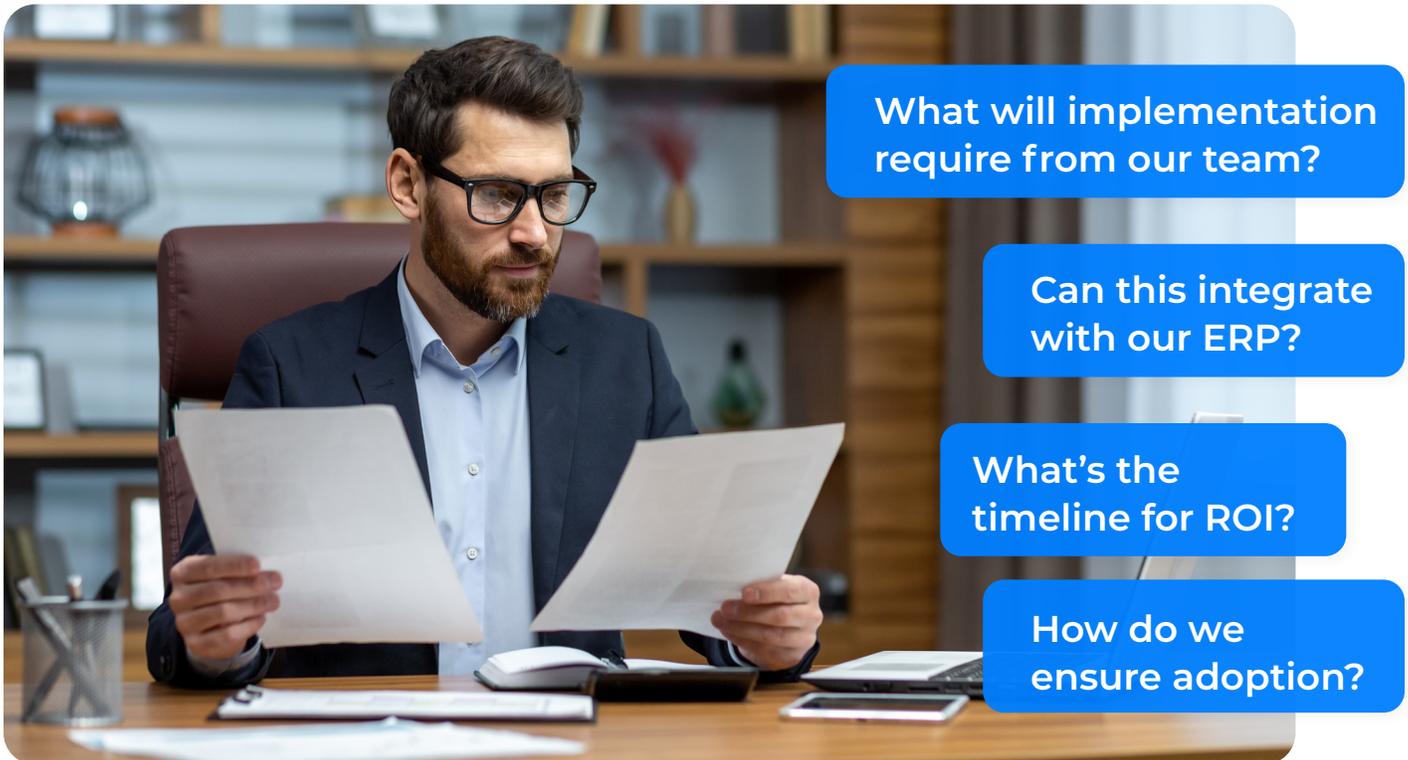
Pro Tip:

Not sure where to start? onPhase can help benchmark your current processes and uncover hidden inefficiencies during a discovery session. Many finance teams don't know these numbers off-hand and that's okay. Schedule a discovery session to benchmark your processes.



Anticipating Objections

Resistance to change is inevitable, but preparation neutralizes objections. Expect these questions and position them as opportunities to showcase value:



Prepare answers that position automation as a strategic enabler and not just a finance tool. Emphasize the value to IT (reduced support), operations (better cross-team workflows), and leadership (faster financial insights).

DID YOU KNOW...

2X

More invoices can be processed per person in the same amount of time with automation

\$1.45

the cost to process an invoice with end-to-end automation compared to \$6.30 with no automation

Stakeholder Messaging Tips

Every stakeholder group views automation through a different lens. Use these cues to shape your message:

For the CFO:

- Emphasize ROI, cost control, and strategic value
- Highlight improved forecasting and financial insights

For the Controller or Finance Manager:

- Focus on accuracy, compliance, and process consistency
- Reinforce time savings and reduced manual effort

For IT Leaders:

- Stress ease of integration with existing systems
- Note reduced maintenance and user support tickets

For Procurement and Operations:

- Share how automation improves supplier communication
- Point out smoother cross-functional workflows

For Executives:

- Highlight scalability and alignment with digital transformation goals
- Speak to business agility and data-driven decision-making

From Pitch to Project

With executive buy-in secured, you can start to execute a strategic supplier selection and phased implementation plan. This critical transition phase determines whether your automation initiative delivers promised value or struggles during rollout.

Key next steps:

- ✓ **Define success criteria with stakeholders**
- ✓ **Identify 2-3 supplier options**
- ✓ **Compare solutions using a scoring matrix**
- ✓ **Choose your partner**
- ✓ **Prepare for implementation with a phased rollout plan**

onPhase offers tailored support throughout this process, from ROI analysis to go-live success, with dedicated implementation specialists who understand both the technical and organizational aspects of finance transformation.

Implementation Readiness Questions

Use these questions to assess how ready your organization is to implement AP automation:

- Are your current AP processes documented and repeatable?
- Do you have buy-in from key stakeholders?
- What systems (ERPs, accounting software, etc.) will need to integrate?
- Who will own the project internally?
- Do you have a clear timeline or deadline driving this change?
- How do you define success for this project?

Being prepared with these answers will help speed up supplier selection and ensure a smoother rollout.

Are You Ready to Automate?

Evaluate your automation readiness with this diagnostic checklist:

- We have clearly defined AP pain points
- Our team spends excessive time on manual tasks
- We've missed early-pay discounts or incurred late fees
- Our invoice approval process lacks visibility
- We want to reduce risk and improve compliance
- We're looking to scale without adding headcount
- We've explored automation but haven't found the right fit

If you checked two or more of these, it's time to explore what automation can do for your team.

Let's Build Your Case Together

Every day spent with manual processes compounds operational risk and widens the competitive gap. Every late payment, missed discount, and manual approval isn't just a workflow issue; it's a missed opportunity for your business to operate smarter, faster, and more strategically.

You've already taken the first step by exploring what's possible. Now's the time to act. Teams across industries are already modernizing their AP operations, reducing costs by up to 80%, and freeing up hundreds of hours to focus on strategic priorities. There's no reason your team should be left behind.

From building a compelling business case to driving measurable results, onPhase helps you lead this transformation with clarity and confidence.



Let's build it together. Schedule a consultation with one of our automation experts to get started.

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