

How to Get Leadership to Finally Invest in AR

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What is Automation?

Definition: The use of technology to perform tasks with minimal human intervention.

Automation is not just about machines taking over – it's about making processes faster, more accurate, and less stressful.

It's a tool to enhance human work, not replace it.

Examples of AR Automation

- Inbox Helpdesk
- Collection Email Automation – RPA, Power Automate
- Payment Ingestion & Application
- Automated Invoice Creation & Delivery
- Dispute Management

Where Are You In the Automation Journey?



Show of Hands:

- Have not begun
- Evaluating, but nothing finalized
- Started, but it's still early
- Multiple automations in place

If you haven't started.. Why not?

Show of Hands:

- Cost/ROI
- Workforce Concerns/Job Loss
- Business Case (Reliability, Complexity, Regulatory/Legal Concerns)
- Change Management
- All of the Above
- Other Reasons?



Worried That Software Will Be Too Expensive?

Are you concerned that software requires too significant an investment or not offer enough of an immediate ROI?

Worried That You/ Your Team Will Be Automated Out of a Job?

Introducing new ways of working into the workforce may be met with:

- Resistance among employees
- Fear they'll need to acquire new skills to stay in their current roles.

Worried You Can't Convince Your Boss of the Business Case?

- **Concerns About Reliability**

- ✓ *Companies are usually conservative about adding potential risks associated with “automated processes/ robots” due to potential malfunctions causing disruption to current systems/ additional manual work for current teams.*

- **Complexity/ Ease of Integration**

- ✓ *The integration alone can be a deterrent for companies as they may not have the necessary resources to successfully implement/ support and manage these new automated processes.*

- **Regulatory/ Legal Concerns or Regulations**

- ✓ *Introducing any new software could potentially involve compliance/ legal regulations, which companies may be hesitant to navigate*

Worried That You Will Be Met by Resistance to Change?

Resistance to change within a department can hinder the implementation of automation.

This is often contrary to the desires of the management team, who often sees benefits or potential ROI from automation.

Identify the Problem You're Trying to Solve

- *Manual Processes - time consuming & prone to errors leading to inefficiencies, incorrect billings & delays*
- *Delayed Payments impact cash flow & create financial stability issues*
- *Lack of visibility into receivables hinders effective decision-making and operational control*

Making Your Case to Leadership

- Define your Problem and the Solution
- Align the project with Strategic Goals
- Have Cross Functional Support
 - *Customize your message to their concerns: security for IT, compliance for Audit, ROI for Finance*
- Incorporate Data-Driven Insights
- Highlight Benefits of Implementation
 - *Use vendor reference or case study examples*
- Have defined plan for implementation, rollout, piloting, communication
- Anticipate questions and be prepared

Actionable Takeaways:

1. Identify What or Who Is Holding You Back
2. Identify The Problem You're Trying To Solve
3. Be Prepared To Make Your Case

Please tell us what you think!

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QUESTIONS?



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