

Driving AP Performance with a Daily Routine

Presented by: Juli Boatner

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Speaker –Juli Boatner, Sr. Manager Aflac Accounts Payable & Travel Accounting



- Joined the Aflac family 27 years ago
- Worked in Aflac Accounts Payable 26 years
- Been a member of IOFM for 10 years
- Worked on many system implementations (ERP systems, AP Invoice workflow, escheat compliance system, etc.)
- Currently manage both the Aflac Accounts Payable and Aflac Travel Accounting teams
- I love my job!



Presentation Overview

- Background of Daily Huddle Board
- Employee acceptance and input
- Design phase of Huddle Board
- Implementation and GO LIVE
- Recommendations
- Demo a HB
- Q & A

Background of Huddle Board

- What is a huddle board?
 - The huddle board is a visual aid designed to enhance departmental G&Os by tracking KPI's for continuous improvements.
- Why did Aflac AP & TA implement a Huddle Board?
 - Aflac Continuous improvement committee was formed
 - Aflac Performance Evaluations was measured by continuous improvement implementations
- When did Aflac AP & TA implement huddle board?
 - Aflac AP & TA implemented in 2018
 - Combined the AP & TA HB in 2024



Employee Acceptance

- How did we drive employee acceptance?
 - Provided educational sessions on the Huddle Board & Continuous Improvement
 - The AP & TA Team designed the Huddle Boards
 - Met as a team to identify KPI'S to track
- How did we handle non-acceptance?
 - Emphasized the HB is to improve the process not to point fingers
 - Effectively listened and quickly addressed their concerns
 - Executive leadership support



Design phase of Huddle Board

TEAM design & Management only Review & Approve

Requirements of an effective HB	Optional
<ul style="list-style-type: none">• Vision Statement• Yearly G&Os at dept. and corporate level• Huddle Board Rules• Huddle Board Agenda• Staff Attendance schedule & Daily Assignments• Presentation Schedule for the full year• Volume of work by Task• Daily KPI's• Bi-Monthly, Monthly, Quarterly, Bi-Annual, & Annual KPI's• Tasks List assigned to staff members with due dates• Announcements, Hot Topics, Recognitions• Skills Assessment	<ul style="list-style-type: none">• Timekeeper• Backup presenter schedule• Huddle Board employee time monitor• Project Board• Sales & Use tax calendar by state• Escheatment calendar by state• Training Schedules• Employee emergency contact information• Employee company directory contact information



Design phase of Huddle Board

- Creation turn around time in about a week
- Pre-Covid-Huddle Board was on a Huge Whiteboard in the middle of our office
 - Whiteboard contained each required section
 - Used magnets, tape, markers, sticky notes, magnetic timer
 - Used employee name placements on floor
 - Pointer to assist with visual presentation
- Post-Covid-Huddle Board was created in excel in a TEAMS folder
 - HB Excel File contained labeled tabs for each section
 - Created legends for clarity
 - Created backup file-should be done monthly
 - Created TEAMS meeting invite to share HB excel file during presentation

Implementation & GO LIVE

- Reviewed Huddle Board
 - Accounts Payable & Travel Accounting staff members designed huddle board
 - Ensured all requirements were met
 - Collaborated as a team, TEAM initiative
 - Met with AP & TA management teams to review and approve KPI's
 - Staff sent final HB file to management for review and approval
 - AP & TA management reviewed and approved
- Staff and Management set target go live date
 - Communication sent out via email
 - TEAM meetings invite for virtual Huddle Board
 - Created TEAMS file and granted access to team members
 - Saved backup file in designated drive
- AP & TA Huddle Board GO LIVE
 - AP Management presented the first week

Recommendations

HB Creation:

1. Designate time each day to work on the huddle board.
2. Onsite HB, ensure you order needed supplies.
3. The HB is always evolving and changing, so, be flexible with initial design.
4. Assign staff members to different HB sections.
5. Set firm deadline and communicate.

Go Live & Post Go Live:

1. Remember everyone is not a fan of public speaking, encouragement is key.
2. The first few months, you may run over targeted time, it gets better.
3. Discuss as a team what is working and not working. Make changes often.
4. Do an end of year presentation for upper leadership of improvements with KPI's.
5. Remember it's about how to improve the process, DRIVE improvement.

Huddle Board Demo

Q & A



Let's Quack about it!!!



Thank you



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