

Conferences Are Only Valuable If Insights Convert to Action: Your 90-day action plan to mature your AP processes

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What usually happens to conference insight

Nothing in this chain is a knowledge problem. Every break in it is an execution problem.

DAY 1 BACK	WEEK 2	MONTH 2	MONTH 6
340 unread emails, a week's worth of meetings and a month-end close waiting. The notebook stays in the bag.	You describe the session to your executives. Everyone agrees it sounds right. Nothing gets assigned.	A vendor demo revives an idea. You have no baseline, so you cannot build the business case. The idea dies.	You come back to this conference carrying the same six scores you brought home from the Fall conference.

Momentum dies in the 48 hours after you return from a conference.

Converting ideas into committed action

We'll spend the next 75 minutes setting a customized 90-day plan.

1

PRIORITIZE

Turn six scores into three initiatives.
Impact against effort, weakest dimensions first.

2

PLAN

Give each initiative an owner, a baseline, a target and a date. Set 30/60/90-day goals.

3

COMMIT

Set the review cadence and name your executive sponsor before you leave this room.

Identifying the path forward

SIX DIMENSIONS

1	Intake & Capture	How invoices reach you, and how much of that arrives machine-readable.
2	Process & Controls	Whether approval and matching rules are written down and followed.
3	Technology & Automation	How much of the work is completed without a person touching it.
4	Data & Visibility	Whether you can produce your own numbers on demand.
5	People & Capacity	Whether the work still runs when a key person is out for two weeks.
6	Supplier & Compliance Risk	How exposed you are to payment fraud and other risks.

FOUR LEVELS

1	Ad Hoc	It depends entirely on who happens to be doing it.
2	Inconsistent	Documented in places. Followed some of the time.
3	Standardized	One agreed way, followed, and measured.
4	Optimized	Measured, improving, and largely hands-off.

Worksheet 1 — Current state vs. future state

Read across each row and pick the description you could evidence today — that is your level for that dimension.

✓ Check the cell where you are today. ★ Star the cell where you aspire to be. (Ask: What's the minimum level of maturity you need to accomplish your next goal?)

Dimension	Ad Hoc	Inconsistent	Standardized	Optimized
Intake & capture	Email and paper, keyed by hand ☐	Some capture tools; varies by supplier ☐	One intake channel, one rule set ☐	Structured data validated at source ☐
Process & controls	Routing by memory; matching is manual ☐	Workflow exists; approvers improvise ☐	Rules-based routing, documented authority ☐	Exceptions are the only human touch ☐
Technology & automation	Point tools, partial coverage ☐	Platform in place, adoption uneven ☐	One platform, end to end ☐	Touchless rate measured and rising ☐
Data & visibility	Numbers take a week and a spreadsheet ☐	Reports exist; definitions differ ☐	Agreed KPIs on a monthly cadence ☐	Live dashboard; answers in the meeting ☐
People & capacity	Volume per head unknown; no backup ☐	Roles written down; cover is informal ☐	Defined roles, cross-trained cover ☐	Capacity modelled against volume ☐
Supplier & compliance risk	Onboarding by trust; mandates unmapped ☐	Checks done but not consistently logged ☐	Verified onboarding, controls tested ☐	Monitored controls, mandate roadmap ☐

You are holding a score, a target and a gap

Whether you scored it yesterday or ninety seconds ago, everyone in this room is now holding the same three things.

You have a score

Six dimensions rated 1 to 4 against evidence you could actually produce — not instinct, not the org chart.

You have a target

The minimum level each dimension has to reach for what your next set of goals will demand of you.

You have a gap

The distance between your check mark and your star. That distance is your next 90 days.

The low-water marks matter most. That is where this session starts.

1

Prioritize

Six scores is a diagnosis. Three initiatives is a plan. Here is how you cut from six to three.

Rank gaps by what they block, not by their size

Before a gap makes your list, run three checks. Size alone does not decide it.

Is it a blocker?

Weak vendor master data breaks every automation built on it. Fix foundations first, even at a smaller gap.

What does it cost?

Gap size is not cost. One point short in controls can hurt more than two points short in reporting.

Can you move it?

If closing it needs budget or people you won't get in 90 days, it goes on the list, not the plan.

Gaps tell you where to look. The following techniques tell you what to do first.

Worksheet 2: Top ideas from this conference, force-ranked

List every idea you're taking home. For each technique, rank your ideas from best (1) to worst, using each number once down the column. Lowest total wins.

Dimensions	#	Idea sparked at this conference	1 What's Really Broken	2 What Gets Unlocked	3 One Talk Approval	4 Who's the Owner	Lowest Score Wins Total
	1						
	2						
	3						
	4						
	5						
	6						
	7						
	8						

Dimensions from worksheet 1:
Intake & capture, Process & controls, Technology & automation, Data & visibility, People & capacity, Supplier & compliance risk



Prioritization techniques:

Four ways to narrow down what'll you'll address in the next 90 days

Fix what's
most broken

Consider the
number of
dependencies

Identify the
path of least
resistance

Who gets in
trouble if/when
it breaks

1

THE BROKEN WINDOW FILTER

Before ranking anything by impact, sort your list into two piles:
One pile is actively costing you money or reputation right now. The other pile would just be nicer to have.

Ask: “Is this fixing something broken, or just something boring?”

A duplicate-payment problem beats an impressive dashboard, every time.

2

REVERSE THE SEQUENCING

Some initiatives, like standardizing vendor master data, aren't valuable on their own. They're the thing three other initiatives depend on. Consider what each idea makes possible.

Ask: “What does this make possible?” not “what does this save?”

Otherwise, you prioritize flashy point solutions over the foundation that speeds up everything else.

3

THE SINGLE- APPROVER TEST

For each initiative, ask whether you could get buy-in in a single conversation with your boss. If it needs a committee, put it on a 90-day track. If it doesn't, start it this week.

Ask: “Can I get a yes on this in one conversation?”

This surfaces the initiatives people love in theory but that die in a budget meeting.

4

THE 'WHO OWNS IT' TEST

Most transformation plans fail from vague ownership, not bad prioritization. For each initiative, consider who “owns” it on a random Tuesday in week six. (Rarely is the owner the executive sponsor.)

Ask: “Who's doing this on a random Tuesday in week six?”

If no one can answer, it isn't a real initiative yet. It's an aspiration.

Bonus Technique

KILL LIST BEFORE ACTION LIST

Before adding anything new to your plan, build a list of what you're going to stop doing. Conference energy adds momentum. It rarely subtracts anything.

Ask: “What comes off my plate before this goes on it?”

Without a kill list, prioritization is just wishful stacking.

The moves that shift each score

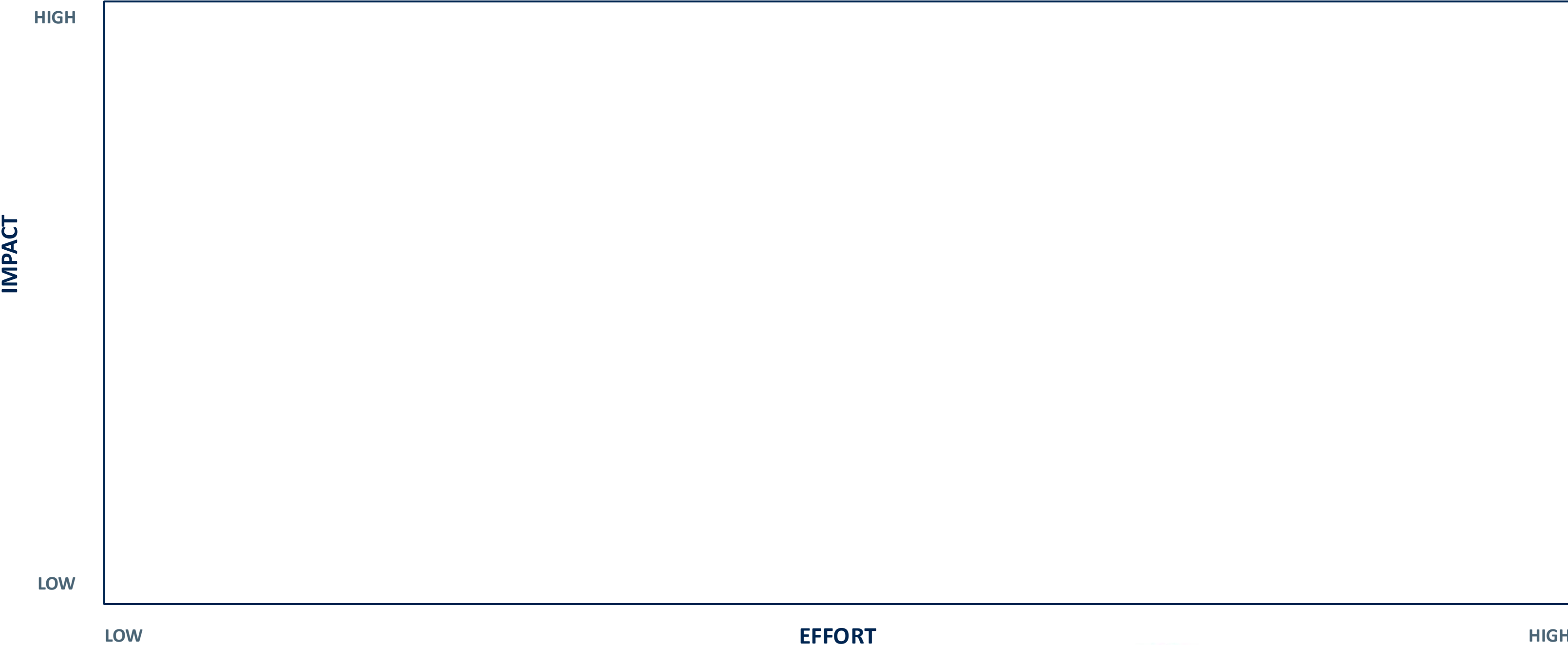
Your six assessed dimensions, and an example of initiatives that move each one.

Note: Start with your lowest scores. The low-water marks matter than the total.

- | | | |
|----|---------------------------------------|--|
| 01 | Intake & Capture | Mandate e-invoicing for your top suppliers · Add a capture tool for the PDF tail · Close the shared AP inbox |
| 02 | Process & Controls | Document one approval matrix · Set match tolerances by value band · Strip out duplicate approver steps |
| 03 | Technology & Automation | Write straight-through rules for clean invoices · Auto-post under a threshold · Retire the manual workarounds |
| 04 | Data & Visibility | Publish a monthly scorecard · Baseline cycle time and touchless rate · Open self-serve reporting to the business |
| 05 | People & Capacity | Cross-train on the single points of failure · Rebalance volume per head · Select the best desk procedure, enforce change |
| 06 | Supplier & Compliance Risk | Verify supplier onboarding · Lock bank-detail change controls · Confirm mandate readiness for your jurisdictions |

Worksheet 3a: Impact against effort

Write each initiative you circled into a box. Anything landing outside the top-left is not a 90-day candidate.



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IMPACT	HIGH	DO FIRST high impact, low effort	SCHEDULE IT high impact, high effort
	LOW	IF THERE IS TIME low impact, low effort	LEAVE IT low impact, high effort
		LOW	HIGH
		EFFORT	

Worksheet 3b: Thinking through your prioritized initiatives

Take your top three initiatives. Answer every row.

	1	2	3
Initiative Name it in five words			
Owner One name, not a team			
First step Doable in the next 7 days			
Biggest roadblock What could stop it			
Proof How you will know it worked			

Why three, and not eight

Every low score you wrote down is a real problem. Trying to fix everything is how none of them get fixed.

Capacity is the constraint

Your team still must close the month.
Three initiatives is all that can usually be accomplished in 90 days.

Sponsors fund focus

A CFO will back a plan with three named outcomes. A longer list reads as a wish list and gets deferred to next year.

90 days is the test

Three moves can show measurable movement by quarter-end. More than that and your changes will remain in flight.

Prioritize your three:

The two lowest-scoring dimensions, plus one quick win, buys you credibility to ask for the rest.

2

BUILD THE PLAN

Three initiatives, each with an owner, a baseline, a target and a date.
Vague plans do not survive contact with month-end.

What makes it a plan and not a wish

Five fields. If an initiative is missing any one of them, it will not survive your first busy week.

EVERY INITIATIVE NEEDS FIVE THINGS

1	OWNER	One person by name, not a department. Departments do not attend status meetings.
2	BASELINE	The number as it stands today. Without it you can't show improvement happened.
3	TARGET	The goal you are going for, stated so a stranger could verify it.
4	DATE	A specific day on the calendar, inside 90 days. Not "Q2".
5	DEPENDENCY	The one thing outside your control that could stall it — named now, not discovered later.

THE SAME INITIATIVE, TWO WAYS

NOT A PLAN
"We need to improve invoice automation and cut down on all the manual touches this year."
A PLAN
Raise touchless invoice rate from 38% to 60% by Aug 31.

One initiative, fully specified

The plan from the last slide, broken into 90 days. This is the level of detail that gets funded.

Touchless invoice rate 38% → 60% · Owner: Dana R. · Dependency: IT sandbox by Jan 15 · Due August 31

DAYS 1–30

- Pull the baseline: touchless rate by supplier, last 90 days.
- Identify the top 50 suppliers processed manually.
- Get IT sandbox access confirmed in writing.

MILESTONE: Baseline signed off by Finance

DAYS 31–60

- Send the e-invoicing ask to the top 50, with a deadline.
- Set auto-post tolerances for invoices under \$2,500.
- Run the rules against last month’s actual volume.

MILESTONE: 25 suppliers enrolled

DAYS 61–90

- Turn the rules on in production for one entity.
- Report the new touchless rate to your sponsor.
- Write down what changed so it cannot drift back.

MILESTONE: Rate at 60%, reported

Notice what is not here: No new headcount, no new system, no board approval. Ninety days buys you proof, not perfection.

Worksheet 4: Your 30/60/90

One owner per row. One date per column. No initiative without a baseline.

Your three initiatives, one per row. Write in pen. A milestone you cannot name is a milestone you will miss.

INITIATIVE & OWNER		BASELINE → TARGET	BY DAY 30	BY DAY 60	BY DAY 90
1	Dimension _____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
2	Dimension _____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
3	Dimension _____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____

Photograph this page; save it on your phone.

3

COMMIT

A plan nobody is waiting on is a plan nobody will finish.
Before you leave this room, decide who will ask you about it.

The memo you send on Monday

Five short paragraphs, sent within 48 hours of landing. This is the single highest-leverage thing you will do today.

WHY A MEMO, AND WHY MONDAY

It transfers the plan

The moment your manager reads it, your intention becomes someone else's expectation.

It timestamps you

A date in writing while your motivation is still high is worth more than a perfect plan in March.

It makes the ask small

One decision, one date. Small, specific asks are the ones that get a yes.

THE TEMPLATE

SUBJECT: AP maturity — three commitments for Q1

1. **Where we are.** Our weakest dimension is _____, at level _____. Here is the evidence behind that.
2. **What I am changing.** Three initiatives, each with one named owner and a 90-day target.
3. **What I need from you.** _____ by _____. That is the only thing I need decided.
4. **What I will report.** These three numbers, monthly, starting _____.
5. **What I am not doing.** The other changes wait until next quarter. I would rather finish three than start more than we can handle.

The cadence that keeps it alive

Three standing meetings, none of them long. Put all three in the calendar before you leave the room.

WEEKLY	MONTHLY	QUARTERLY
15 minutes · owners only Each owner says one of three things: on track, at risk, or blocked. No slides, no discussion of anything else.	30 minutes · with your managers The three numbers against baseline, on one page. This is where you show movement, not effort.	45 minutes · with your executive sponsor What moved, what did not, and the one thing you need decided for the next 90 days.

THE MONTHLY SCORECARD — THREE NUMBERS, NOTHING MORE

METRIC	BASELINE	90-DAY TARGET	THIS MONTH

If a number is not on this page, it is not part of the plan.

Efficiency Benchmarks								
Metric	How it's calculated	Automation level	Below average performance		Average performance		Above average performance	
			Result	Share of segment	Result	Share of segment	Result	Share of segment
Invoices per FTE 5 People & Capacity 3 Technology & Automation	Invoices processed ÷ AP FTEs	No Automation	<250	27%	250-999	45%	>1,000	27%
		Minimally Automated		—		—		—
		Partially Automated		35%		35%		29%
		Fully Automated		31%		38%		31%
Cost per invoice 3 Technology & Automation 5 People & Capacity	Total AP processing cost ÷ Invoices processed	No Automation	>\$10	41%	\$5-\$10	22%	<\$5	37%
		Minimally Automated		39%		32%		29%
		Partially Automated		38%		30%		32%
		Fully Automated		33%		24%		43%
Invoice cycle time 1 Intake & Capture 2 Process & Controls	Total days from receipt to approval ÷ Invoices processed	No Automation	4 days or more	81%	—	—	3 days or fewer	19%
		Minimally Automated		83%		—		17%
		Partially Automated		54%		—		46%
		Fully Automated		81%		—		19%
Touchless share 3 Technology & Automation 1 Intake & Capture	(Invoices with no manual touch ÷ Invoices processed) × 100	No Automation	<25%	83%	25-50%	3%	>50%	13%
		Minimally Automated		90%		5%		5%
		Partially Automated		66%		15%		19%
		Fully Automated		50%		16%		33%
Three-way match automation 2 Process & Controls 3 Technology & Automation	(Invoices auto-matched ÷ Invoices requiring a three-way match) × 100	No Automation	<55%	66%	55-75%	18%	>75%	16%
		Minimally Automated		—		—		—
		Partially Automated		53%		34%		13%
		Fully Automated		46%		41%		14%

Effectiveness Benchmarks								
Metric	How it's calculated	Automation level	Below average performance		Average performance		Above average performance	
			Result	Share of segment	Result	Share of segment	Result	Share of segment
Exception rate 02 Process & Controls 01 Intake & Capture	(Exception invoices ÷ Invoices processed) × 100	No Automation	>15%	39%	5-15%	27%	<5%	34%
		Minimally Automated		43%		17%		39%
		Partially Automated		16%		50%		34%
		Fully Automated		44%		30%		26%
Duplicate payment rate 06 Supplier & Compliance Risk 02 Process & Controls	(Duplicate payments ÷ Payments issued) × 100	No Automation	>1%	6%	0.4-1%	8%	<0.4%	87%
		Minimally Automated		—		—		—
		Partially Automated		5%		11%		84%
		Fully Automated		3%		32%		66%
Early pay capture 04 Data & Visibility 02 Process & Controls	(Discount dollars captured ÷ Discount dollars offered) × 100	No Automation	<25%	76%	25-50%	7%	>50%	17%
		Minimally Automated		74%		5%		21%
		Partially Automated		70%		6%		24%
		Fully Automated		65%		8%		27%

Five ways this dies, and what to do today

None of these are surprises. Every one of them can be pre-empted while you are still in this room.

WHAT KILLS THE PLAN	WHAT YOU DO ABOUT IT BEFORE YOU LEAVE
Month-end swallows the first 30 days.	Set the Day 30 milestone before your close week, not after it.
The owner changes jobs in February.	Name a deputy on every initiative today. One extra line in the plan.
Nobody ever agreed what the baseline was.	Get Finance to sign off the baseline number in week one, in writing.
Someone proposes buying a new system instead.	Answer with the baseline. Prove the process problem before anyone buys a tool.
Your sponsor forgets they said yes.	The monthly scorecard is the reminder. Send it even if they didn't ask for it.

Worksheet 5: Your commitment

The last five minutes of this session. Fill it in, sign it, and photograph it before you stand up.

MY THREE INITIATIVES

1

owner · baseline → target · date

2

owner · baseline → target · date

3

owner · baseline → target · date

THE MEETING I WILL BOOK BEFORE FRIDAY

Who with

On what date

What I am asking them to decide

MY PEER PARTNER FROM THIS ROOM

Name and organization

Email

We compare notes on (date)

I will report progress on these three initiatives to the person named above by _____.

Signed

Date

Pull out your phone and photograph this page, too.
Set a reminder for your day 30 milestone now.

Actionable Takeaways

Three things to do in the next five business days.

1. Identified and prioritized your biggest performance gaps.

Not the loudest complaint, and not the easiest fix. Scored the six dimensions against evidence you can actually produce and let the low-water marks set your agenda.

2. Commit to three initiatives, not more.

Each one gets a named owner, a baseline signed off by Finance, a target, and a date inside 90 days. Missing any one of those five fields and it is not yet a plan.

3. Send the memo within 48 hours and book the reviews now.

Five short paragraphs to your manager, including what you are deliberately not doing. Then put the weekly, monthly and quarterly check-ins in the calendar before you leave Austin.

Conferences are only valuable if insights convert to action. That conversion happens in the next five days, or it does not happen.

QUESTIONS?

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REMINDER!

If you checked in for NASBA CPE credit, check out at iofm.cnf.io