



The Future Focused AP Leader:

Navigating AI and Automation

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Leadership

Automation

Culture

IOFM Spring
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Why this moment matters

AI adoption is accelerating faster than most operating models and team habits.

Signals leaders cannot ignore

AI is already at work

75% of knowledge workers say they use AI at work.

Leadership pressure is rising

79% of leaders say AI adoption is critical to staying competitive.

The skills mix is changing

39% of core job skills are expected to change by 2030.

The New Era of Automation

- AI and Automation: A Game Changer
- Opportunities and Disruptions
- Transforming the AP Landscape

Bottom line: AP leaders need a people strategy, not just a technology plan.

What AI and automation can unlock in AP

The strongest use cases remove friction, improve visibility, and free people for higher-value work.

Invoice intake & extraction

Capture data from invoices, emails, and attachments faster and with fewer manual touches.

Routing & approvals

Use rules plus AI recommendations to move exceptions to the right approver quickly.

Matching & exception handling

Prioritize discrepancies, missing fields, and duplicate risk before they become delays.

Insights & forecasting

Turn AP data into trends on cycle times, bottlenecks, vendor behavior, and cash timing.

Leader mindset shift

Move the team conversation from “What tasks go away?” to “What higher-value work becomes possible?”

What your team may be feeling

Apprehension is normal. High-trust leaders surface concerns early instead of dismissing them.



Job security

“Will automation replace parts of my role?”



Loss of control

“Will decisions be made by systems I do not understand?”



Skill anxiety

“Can I keep up with the pace of change?”



Change fatigue

“Is this one more initiative without enough support?”

Building a Culture of Continuous Learning

Key Strategies for Organizations



Acknowledge the emotion before you accelerate the implementation.

Build a culture of learning and experimentation

Adoption improves when people have permission to learn, practice, and improve in public.

1. Demystify the tools

Show what the system does, where it helps, and where human judgment still matters.

2. Start with guided practice

Create simple use cases, job aids, and role-based examples for AP workflows.

3. Reward learning behavior

Recognize curiosity, shared tips, and process improvements—not just speed.

4. Normalize iteration

Treat early mistakes as feedback for the process, training, and controls.

A practical leadership framework

Lead the transition across four dimensions at the same time.

Process

Prioritize the AP steps with the most manual effort, delays, or rework.

People

Clarify role changes, skill needs, and expectations for human oversight.

Controls

Define policy, auditability, exception thresholds, and escalation paths.

Communication

Share the why, the wins, the limits, and the next steps repeatedly.

90-day roadmap for AP leaders

Keep momentum high by sequencing change into visible, manageable steps.

Days 1–30

Listen and assess

Map pain points, identify top use cases, and capture team concerns.

Days 31–60

Pilot and train

Test one or two workflows, create simple SOPs, and coach managers.

Days 61–90

Scale and measure

Refine controls, share results, and expand what is working.

What success should look like

Balance efficiency metrics with adoption, confidence, and control quality.

Operational

Cycle time
Touchless rate
Exception backlog

People

Training completion
Confidence pulse scores
Peer knowledge sharing

Risk & control

Audit trail quality
Approval adherence
Error and duplicate trends

Make progress visible. Teams adopt faster when they can see both performance gains and support systems improving.

Five leadership moves that build trust

The message is not “use the tool.” The message is “we will learn this together.”

- 1 Be transparent about why change is happening and what will not change.
 - 2 Involve AP experts in designing workflows, prompts, rules, and exception handling.
 - 3 Train managers to coach confidence, not just compliance.
 - 4 Celebrate quick wins that improve service, speed, or accuracy for the team.
 - 5 Keep humans accountable for judgment, approvals, and ethical decisions.
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3 key actionable takeaways

If your team remembers only three things, make them these.

1

Start with one high-friction AP workflow

Choose a visible pain point and pilot automation where the team will feel relief quickly.

2

Lead with empathy and clarity

Name concerns, explain the role of human judgment, and communicate often.

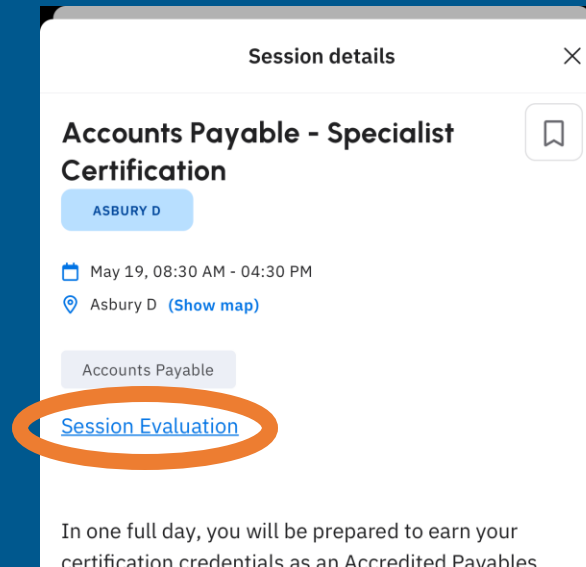
3

Invest in learning before scaling

Create role-based training, manager coaching, and simple measures of adoption.

Please tell us what you think!

- Please scan this QR code using your mobile to access a short feedback survey →
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Tuesday 10:15am – The Future Focused AP Leader

The most effective AP leaders will blend technology adoption with human-centered leadership!



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QUESTIONS?

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