


The Secrets to Go-Live AP Automation Success

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Tracey Ferguson Knight – Principal Consultant

- Practitioner
- Vendor – sales, solution consultant, implementations, client success
- Consultant – specialize in helping companies find the best fit
- Buyer – SaaS technology

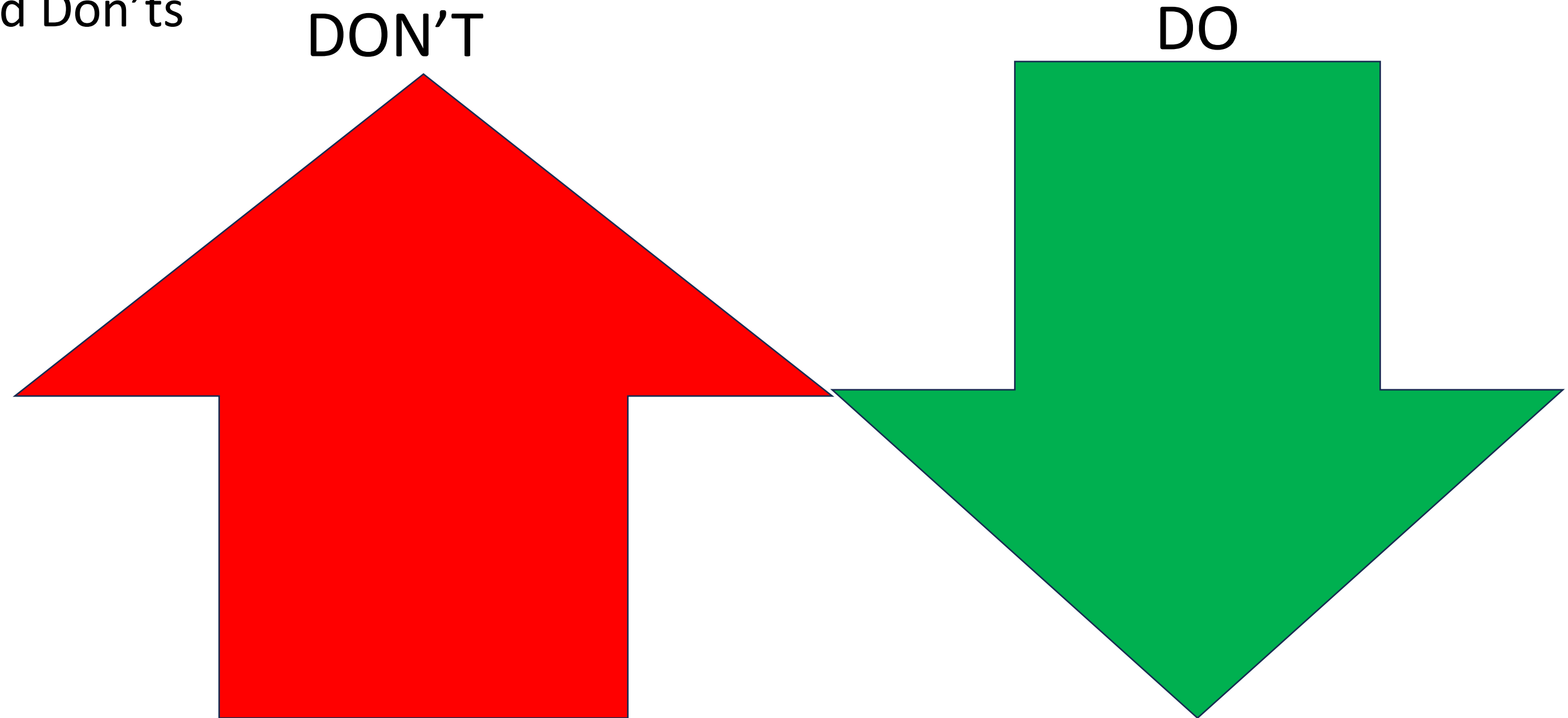


Project Failure – The fault lies more in selection than implementation



Agenda - The Secrets to Go-Live AP Automation Success

- Top 10 Do's and Don'ts
- Q&A



#10

DON'T

Start thinking/
planning for
technical
integrations first

DO

Define business
outcomes / Goals
first

#9

DON'T

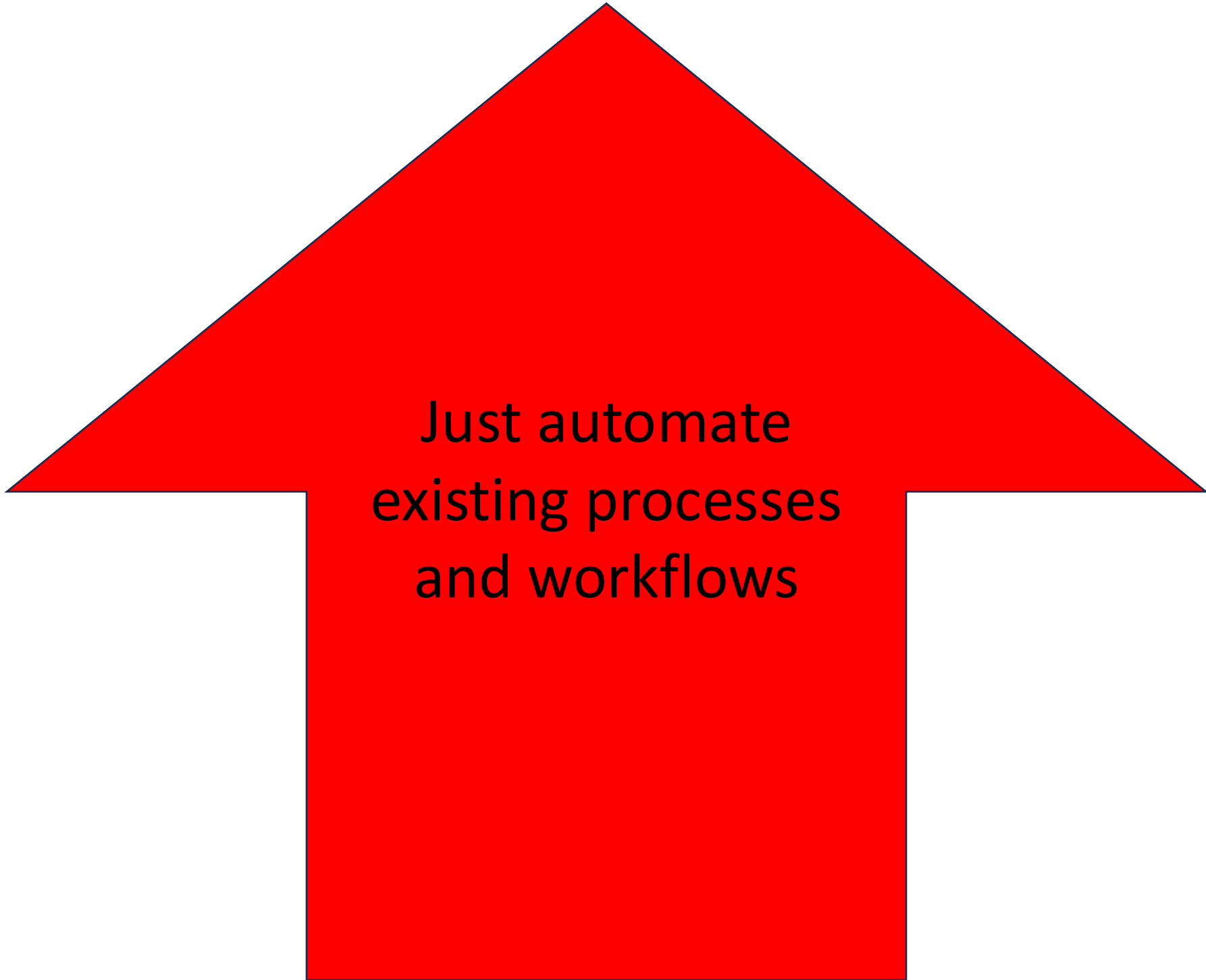
Assume core
capacity or
"figure it out later"

DO

Have requirements
before starting and
complete them
before ending
"Design Phase"

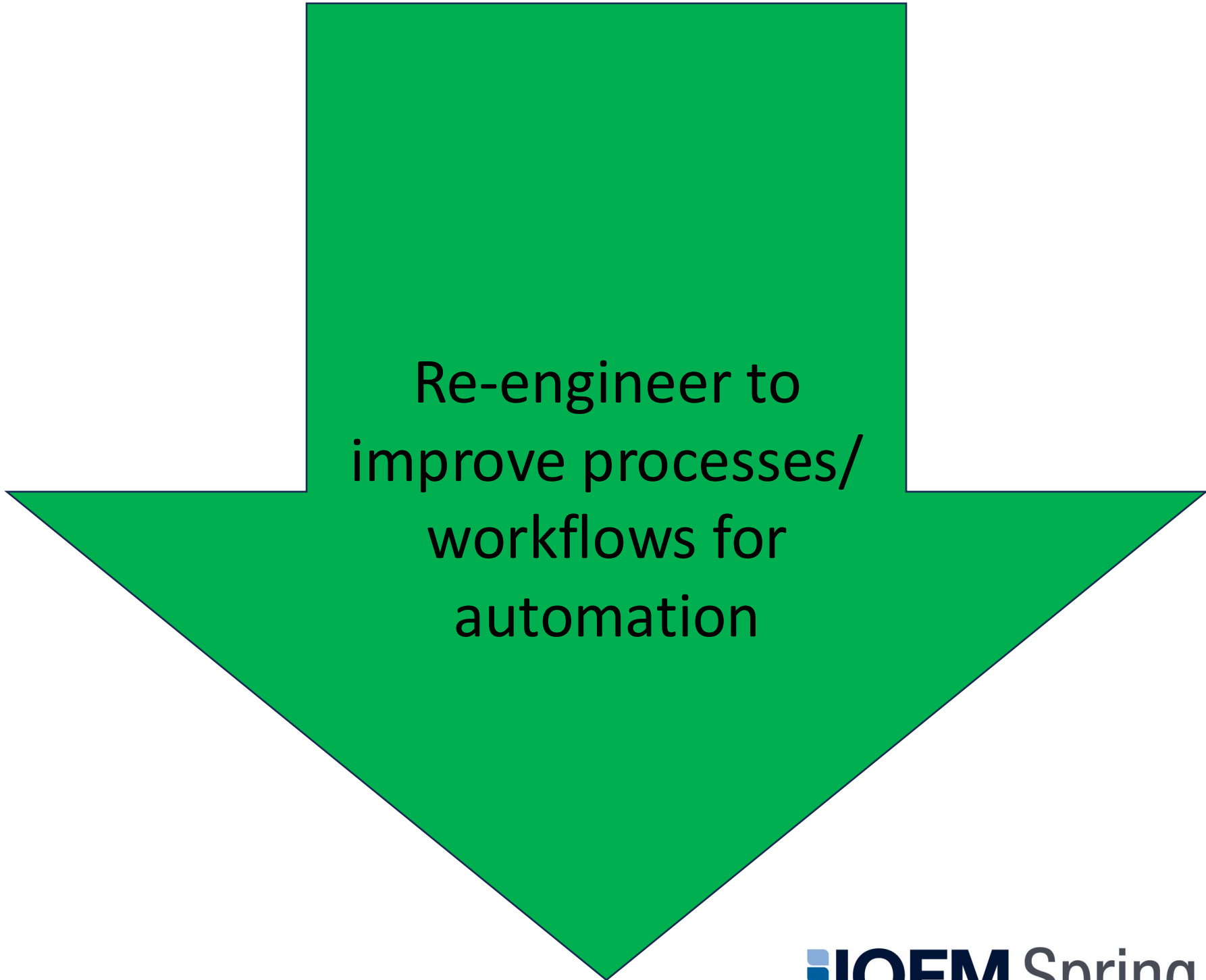
#8

DON'T

A large red arrow pointing upwards, with a rectangular base and a triangular top. The text is centered within the arrow.

Just automate
existing processes
and workflows

DO

A large green arrow pointing downwards, with a rectangular top and a triangular bottom. The text is centered within the arrow.

Re-engineer to
improve processes/
workflows for
automation

#7

DON'T

Optimize for AP
alone

DO

Involve cross
functional
stakeholders early

#6

DON'T

Treat integration as
basic "plumbing"

DO

Treat data as a
strategic asset

#5

DON'T

Assume all
integrations are
the same

DO

Design around
actual system
resources and
constraints

#4

DON'T

Wait to think about controls at final testing or "go live"

DO

Embed controls (including IA) into the integration/ processes/ workflows design

#3

DON'T

Over-engineer
"Day 1"

DO

Plan integrations as
progressive build
cycles

#2

DON'T

Test only "perfect" scenarios or when things work as intended

DO

Test for real world imperfect scenarios when things don't work right

#1

DON'T

Treat AI as a plug & play feature


DO

Align with the company's overall AI strategy

Conclusions

- One of the worst things you can do is simply automate a poor process
- Make sure you maximize value for your company (not just your department)
- Requirements start before you start selection and continually refine through design
- Real Project Management (internal or external) is a requirement for big projects and even small projects need some rigor
- Don't take shortcuts – after the initial selection, nothing else is more important than a quality implementation to getting max value and achieving promised goals/targets.
- Measure before you start/ measure when you finish / measure ongoing

Please tell us what you think!

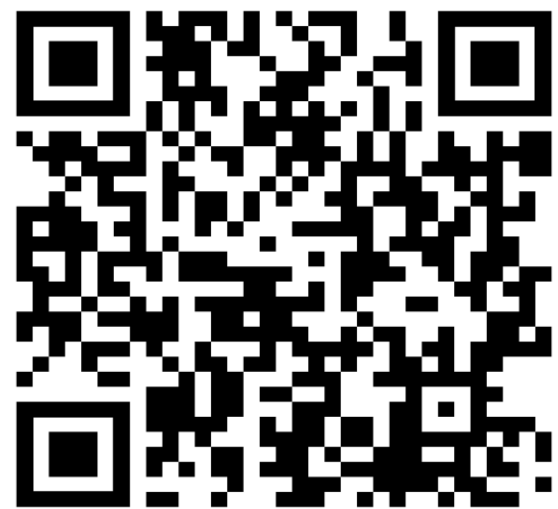
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QUESTIONS?

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