

Concur Invoice Email Campaign

Includes:

- Email template with link to whitepaper asset
- Conversation starter guide
- Discovery questions to ask
- Potential objections

Email Template: Invoice

Asset Description:

A whitepaper that analyses common AP processes and highlights some of the common challenges and pitfalls of manual processes and how technology can help organisations change.

Audience:

Finance roles (CFO, Finance Manager, Accounts Payable managers) in any sized organisations.

Whitepaper download link

Suggested Subject Line: How to make your AP process more efficient

Suggested Copy:

Dear [First name],

Is your AP process as efficient as you would like?

Does your team spend time:

- *Chasing employees to approve invoices*
- *Fixing errors from manual data entry*
- *Resolving exceptions*
- *Re-keying data from one place to another*
- *Taking calls from suppliers chasing payment*

If they are, it may be time to review your AP process and see how you can reduce errors, save time and become a partner to your business.

Take the first steps to improving your AP process.

This guide shows you the truth behind the AP process and how automation can fix it.

To find out more about Concur, give us a call or visit www.concur.co.uk.



**The truth behind
the AP process and
how automation can fix it**

Download now



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Conversation starter:

1

We help companies with their employee spend management processes- typically there are two areas of controllable spend which are: Invoices and 2. Employee expenses. In my experience they tend to be managed manually.



Potential Outcome 1: Interested in both expense and invoice

Understand which of those challenges mentioned resonates most and why. Try and delve deeper and understand pain points.



2

Most companies have told me with any manual process that it can be time consuming, difficult to manage the process and they are facing demands for improved data accuracy to help them reduce costs-

I wondered if you have found any of those in your experience and how it currently works for COMPANY NAME.



Potential Outcome 2: Only one area has enough volume

Assure them that lots of companies are in the same boat that one area tends to represent a bigger proportion of the AP teams time. Confirm which of those areas you mentioned resonates most



Potential Outcome 3, 4 ,5: Too small, don't see value or already automated

*See objections slide

Questions to ask:

1

Understand if they treat expenses and invoices as separate processes. Make sure to pass this detail onto your Advisor Sales team.



Who is responsible for checking the expenses and invoices? How long does it take them on average?

Who is responsible for entering the data into the system? How long does that typically take?

How do approvers who are based remotely access the information for approval?

What reports do you currently run to gain insight into employee spend? How easy is it to get your hands on that data?

How do you currently assign invoices out for approval?

How do you keep track of all of the approvals and the different phases they are in?

What is the current process for 2 way matching?

How to you determine the amount spent on a project if some of it is expensed and some of it goes through the invoice process?

Potential Objections:

“We use an ERP bolt on...”



Typically they use ERP to raise a PO only. “How do you route invoices for approval?”

“ We use a document management system...”



Just a document storage system like the box. “How do you route invoices for approval? How do you enter the data into your finance system?”

“ We are too small to automate”



Clarify what they mean by too small. Assure them that they not.

“Manual processing has its drawbacks: It’s slow. It’s obscure...and you lack control - you don’t really know where everything is in the process or what outstanding liabilities are involved. It takes a lot of manpower, and there is always a risk for human errors”.

“Most businesses don’t know how much they are losing with their current process, they know that there are opportunities to save money but are unsure on the sum available to them”

“Most Finance Directors tell me that the process is paper based and this means your team are busy correcting errors, missing early payment discounts and taking queries from suppliers and employees on the payment status. They are spending too much time doing manual work.