GrowCFO x yooz

The AP Automation Playbook

A practical guide to building the business case, selecting the right solution and delivering a successful rollout.

Written in partnership with Yooz · getyooz.com

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Why This Playbook

Accounts payable is still one of the most manual, most error-prone processes in finance, and one of the most visible to the rest of the business when it goes wrong. Invoices get lost, approvals stall, month-end becomes a scramble, and finance teams spend hours chasing paperwork instead of adding strategic value.

This playbook, written jointly by GrowCFO and Yooz, exists to change that. It brings together practical, field-tested guidance for finance leaders who are ready to build the case for AP automation, choose the right partner, and land the change successfully, drawn from real deployments and real results.

$15–$40 / £11–£30*

average cost to process a single invoice manually

80%

reduction in processing time achievable with AI-driven automation

100M+

Invoices processed by Yooz for more than 1 million vendors to date

https://www.getyooz.com/blog/ap-cost-per-invoice

Source: getyooz.com

Five Plays. One Game Plan.

Rather than chapters, this playbook is organized like a team's game plan: five practical, repeatable plays finance leaders can run in sequence to take AP automation from idea to impact.

01	**Build the Business Case**	Identify the pain, quantify the cost, win the room.
02	**Select the Right Solution**	Define requirements and evaluate vendors with rigor.
03	**Plan the Rollout**	Govern the project and manage the change.
04	**Drive Adoption**	Train users and embed the new way of working.
05	**Measure ROI**	Track the KPIs and report the impact to the CFO.

PLAY 1

Build the Business Case

Before you evaluate a single vendor, you need a case for change that stands up in front of the CFO, grounded in pain, cost and stakeholder support.

PLAY 1 | Step 1

Identify the Pain Points

Start where it hurts. The strongest business cases are built on pain your stakeholders already recognize, not hypothetical efficiency gains.

1

Manual matching & data entry

AP staff re-key invoice data and chase three-way matches invoice by invoice.

2

Slow, unclear approvals

Paper or email approval chains stall in inboxes with no visibility on where an invoice sits.

3

Lost or duplicate invoices

Paper and PDF invoices get missed, duplicated, or paid twice with no central record.

4

Limited real-time visibility

Finance can't answer 'what do we owe, and when' without pulling a manual report.

5

Fraud and compliance exposure

Manual processes make it harder to catch fraudulent or altered invoices before payment.

6

Month-end crunch

AP backlogs pile pressure onto the close, delaying accurate financials.

PLAY 1 | Step 2

Quantify the Cost of Manual AP

Pain gets attention. Numbers get budget. Translate what you found in Step 1 into a cost finance leadership can't ignore.

$15–$40/£11-£30*

Cost to process one invoice manually, all-in

80%+

Potential reduction in processing time and cost

15 ⇨ 3 days

Typical invoice cycle time, manual process vs. best in class automation

A simple formula for your business case:

Monthly invoice volume × cost per invoice × 12 = your annual cost of manual AP

https://www.getyooz.com/blog/ap-cost-per-invoice
Source: getyooz.com

PLAY 1 | Step 3

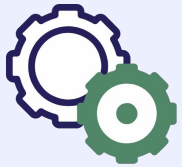
Secure Stakeholder Buy-In

Every stakeholder cares about something different. Frame the case in the language each one already speaks.



The CFO

Cost savings, DPO and working capital impact, audit-ready controls, faster close.



IT

Integration with existing ERP, data security, low implementation burden.



The AP Team

Less repetitive data entry, fewer chasing emails, clearer daily workload.

PLAY 1 · Spotlight

FREENOW Spotlight: How They Built the Case for Change

FREENOW

How FREENOW built the case for change

Challenge

FREENOW, a mobility app operating in ten European markets, ran AP separately across its subsidiaries using multiple ERPs (Microsoft Dynamics NAV and Sage 1000). Managing invoices country by country was costly and inconsistent, with no shared view across the business.

Approach

In 2020, FREENOW acquired the French company Kapten, which was already using Yooz. That gave the finance team a live proof point: Yooz was well suited to centralizing invoice collection across every subsidiary, which became the basis for the case to adopt it group-wide rather than maintain separate country-by-country processes.

Result

Leadership approved a single, centralized AP platform for all ten European subsidiaries, clearing the way for the phased rollout covered in the Play 3 spotlight.

Source: Yooz customer success story, "FREENOW," getyooz.com

PLAY 2

Select the Right Solution

Not all AP automation platforms are equal. A disciplined, criteria-led selection process protects you from an expensive mismatch.

PLAY 2 | Step 1

Define Your Requirements

Write your requirements down before you take a single vendor call. It keeps the process objective and comparable.

Capture & data extraction

AP staff re-key invoice data and chase three-way matches invoice by invoice.

ERP integration

Native, two-way integration with your existing finance system

Workflow & approvals

Configurable, rules-based routing that mirrors your approval matrix

Fraud & compliance

Duplicate detection, audit trail and regulatory e-invoicing support

Reporting & visibility

Real-time dashboards on invoice status, spend and liabilities

Scalability

Support for multiple entities, currencies and languages as you grow

PLAY 2 · Step 2

Questions to Ask Vendors

1. How is your AI trained, and how does accuracy improve over time?
2. What does a typical implementation timeline look like for a business our size?
3. How do you handle multi-entity, multi-currency and multi-language environments?
4. What does your fraud and duplicate-invoice detection actually catch?
5. Which ERPs and finance systems do you integrate with natively, and how?
6. What ongoing support and account management should we expect post go-live?
7. Which organizations similar to our own use the product. Can we talk to one?

PLAY 2 | Step 3

Evaluation Scorecard

Score every vendor against the same weighted criteria. It turns a subjective bake-off into a defensible decision.

Criteria	Weight	Vendor A	Vendor B	Vendor C
Capture & AI accuracy	25%			
ERP integration fit	20%			
Workflow flexibility	15%			
Fraud & compliance	15%			
Implementation timeline	10%			
Total cost of ownership	10%			
Support & partnership	5%			
Weighted total	**100%**			

PLAY 2 · Step 4

Common Pitfalls

✕ **Choosing on price alone**	Weigh total cost of ownership, not just licence fees. Poor fit costs more in year two.
✕ **Skipping the ERP integration test**	Insist on seeing the ERP integration live before signing, not just described.
✕ **No internal owner post-decision**	Assign a named project lead before contracting, not after.
✕ **Underestimating change management**	The best software still fails if approvers don't adopt it. Plan Play 3 and 4 in parallel with selection.

PLAY 3

Plan the Rollout

The contract is signed. Now the real work starts: governance and change management determine whether go-live is a success or a struggle.

PLAY 3 · Step 1

Project Governance

Executive sponsor

Removes roadblocks and keeps the project visible at leadership level

Change lead

Owns communication, training and adoption tracking

Project lead

Owns the day-to-day plan, timeline and vendor relationship

Steering committee

Meets on a fixed cadence to review progress and unblock decisions

IT lead

Manages integration, data migration and security sign-off

PLAY 3 · Step 2

Change Management

Treat change management as a workstream in its own right, not an afterthought to the technical rollout.

1 Communicate the why → **2** Train the users → **3** Support go-live → **3** Reinforce & refine

> *Tip: run a short pulse survey after each phase to catch resistance early, while it is still cheap to fix*

PLAY 3 · Step 3

Success Metrics for the Rollout

Entities live

% of legal entities or business units migrated on schedule

User activation rate

% of trained users who have logged in and processed an invoice

Time to first touchless invoice

Days from go-live to the first invoice processed with zero manual touch

Support ticket volume

Trend of go-live queries, watched weekly to catch friction early

PLAY 3 · Spotlight

FREENOW Spotlight: Rolling Out Across 10 Entities in Six Months

FREENOW

Rolling out across 10 entities in six months

Challenge

FREENOW, a mobility app operating across ten European markets with roughly 700 staff, ran its AP process across multiple ERPs (Microsoft Dynamics NAV and Sage 1000). After acquiring a business already using Yooz in 2020, it needed to centralize invoice handling across every subsidiary without disrupting local teams.

Approach

The team phased the rollout by invoice volume, smallest entity first. Austria went live in April 2021, followed by each subsequent country in turn, with Germany, the largest and most complex entity, deliberately saved for last so lessons learned earlier could be applied. Every team completed role-based training before go-live.

Result

All 10 subsidiaries were onboarded in 6 months (April to October 2021). Invoice turnaround time dropped from 1-2 weeks to just 3-4 days, and every entity gained real-time visibility into invoice status through one centralized, permissioned system.

Source: Yooz customer success story, "FREENOW," getyooz.com

PLAY 4

Drive Adoption

A platform is only as good as its adoption. This is where finance leaders turn a successful go-live into lasting behaviour change.

PLAY 4 · Step 1

Training Users

AP team

Deep, hands-on training on capture, coding and exception handling

Approvers

Short, role-specific training focused only on the approval workflow

Requesters

Light-touch guidance on submitting and tracking a request

Finance leadership

Dashboard walkthroughs: what to look at, and what good looks like

PLAY 4 · Step 2

Embedding New Processes

Old habits are the biggest threat to adoption. Retire the manual workaround the day the new process goes live.

Before

- Invoices arrive by email and post
- Manual re-keying into the ERP
- Approval by forwarded email
- Status tracked in a spreadsheet

After

- Invoices captured automatically from any channel
- AI-coded and matched against PO/GRN
- Routed for approval by workflow rule
- Status visible in real time to everyone

PLAY 4 | Step 3

Measuring Adoption Success

90%+

of invoices captured without manual intervention

<24hrs

average approval turnaround time

100%

of active users logging in weekly, not just at go-live

PLAY 4 · Spotlight

FREENOW Spotlight: Achieving High User Adoption

FREENOW

Achieving high user adoption

Challenge

- Lengthy invoice processing time
- Decentralized accounting team
- Multiple accounting systems after business merger
- Lack of visibility of invoice status

Approach

- Started with the smallest subsidiary (Austria) to build confidence.
- Rolled out to 10 subsidiaries in 6 months.
- Provided role-based training and workshops.
- Centralized invoice management in Hamburg for all European entities.

Result

- A smoother supplier invoice accounting process
- Improved visibility and traceability of cash flow
- Divided their invoicing processing time by three
- Reduced their invoice processing costs
- A more centralized and standardized AP process

PLAY 5

Measure ROI

The business case doesn't end at go-live. Ongoing measurement is what keeps AP automation funded, trusted and improving.

PLAY 5 | Step 1

KPIs Every Finance Leader Should Track

Cost per invoice

Fully loaded processing cost, tracked monthly

Days Payable Outstanding

Impact of faster, more predictable processing on DPO

% touchless invoices

Share processed with zero manual intervention

Invoice cycle time

Days from receipt to approval and payment

Early payment discounts captured

Value unlocked by paying faster and more reliably

Exception & error rate

Duplicate payments, mismatches and manual corrections

PLAY 5 | Step 2

Reporting to the CFO

Frame the ongoing story in four pillars: the same language the CFO used to approve the original business case.



Cost savings

Actual vs. projected cost per invoice and total AP cost



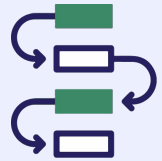
Efficiency

Cycle time, touchless rate and headcount capacity freed up



Risk reduction

Fraud caught, duplicate payments avoided, audit readiness

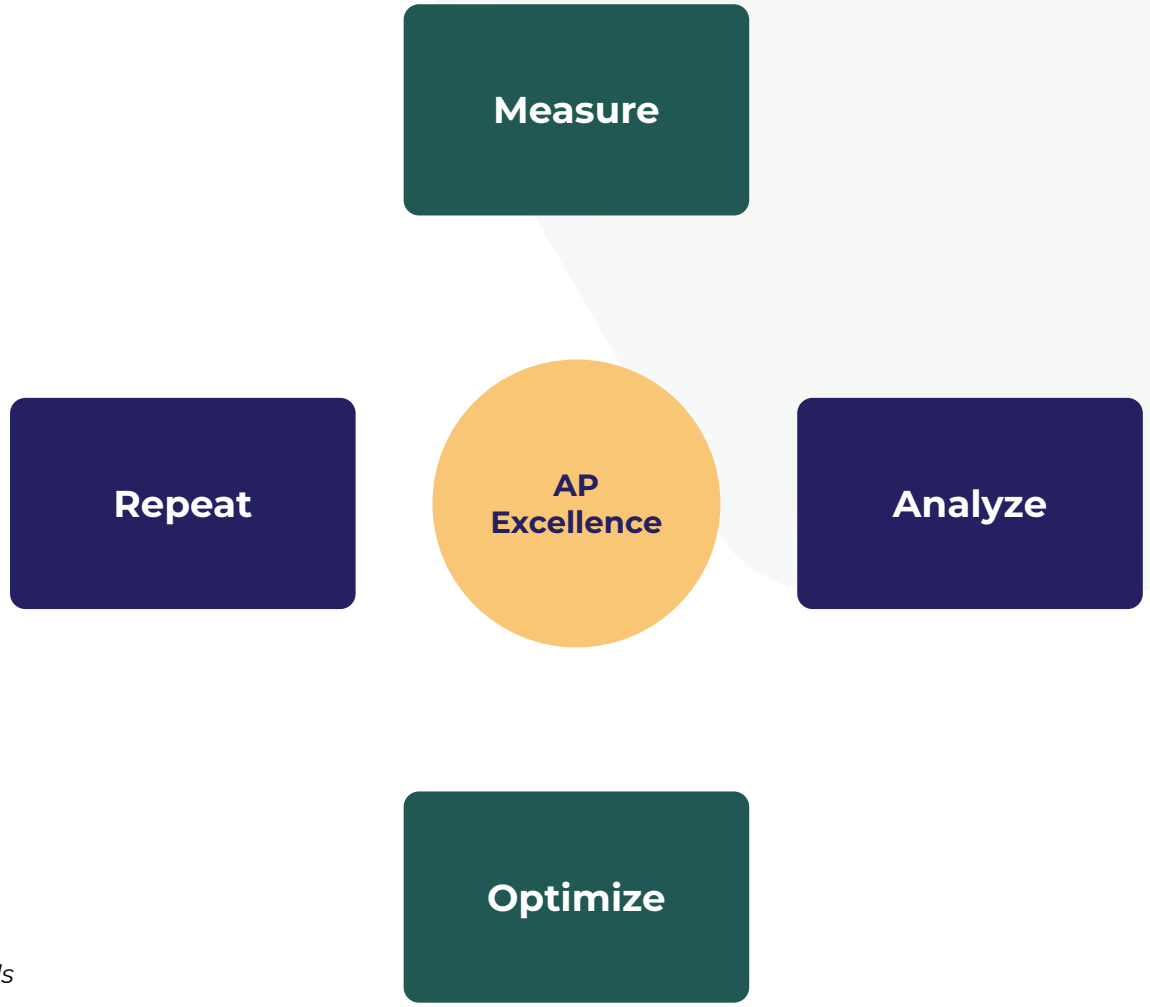


Strategic capacity

Hours redirected from processing to analysis and forecasting

PLAY 5 · Step 3

Continuous Improvement



Treat automation as a living process. Revisit workflows, scorecards and KPIs at least twice a year as volumes, entities and vendors evolve.

Ready to Run the Plays?

GrowCFO helps finance leaders build the skills and networks to lead transformation with confidence. Yooz gives them the AI-powered AP automation platform to deliver it.

GrowCFO

Finance leadership development, community and coaching for CFOs and finance leaders.

growcfo.net

yooz

AI-powered, real-time Accounts Payable and Purchase-to-Pay automation for finance teams worldwide.

getyooz.com