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# THE ENTERPRISE LEADER'S GUIDE TO BUYING AP AUTOMATION

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/ PART 2 /

MAPPING YOUR AP PROCESS

Reading time: 13 minutes

# MAPPING YOUR AP PROCESS

Direct Commerce delivers AP automation software solutions to the world's largest companies. This guide is based on our extensive experience, and it is designed to help you prepare your buying team as you search for the best AP automation solution for your enterprise.

In Part 2, you'll break down your AP process into steps and learn how enterprise leaders map their process for understanding and insight, and how they use that insight to prepare their team for AP automation buying.

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## Key Insights

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- Most enterprise buying teams don't know what they want to buy. They lack important knowledge from key business stakeholders and daily users about what actions, decisions, and data are critical to their current process.
- A complete and accurate AP process map empowers the AP automation buying team to vet, critique, and select the right AP automation solution for your enterprise by identifying the parts of your process that can either be replaced, removed, retained, or transformed by the right AP automation solution
- Creating an AP process map for your business can be daunting. Outside experts like those at Direct Commerce can help by advising on best practices and adding industry insight.

You can find further resources from our AP Automation Buying Guide at [this link](#) or by emailing [info@directcommerce.com](mailto:info@directcommerce.com).

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# Most enterprise buying teams don't know what they want to buy. You can be different.


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With over two decades of experience guiding buying teams and implementing our solutions for the world's largest companies, Direct Commerce has worked side-by-side with clients who spent most of their buying cycle not truly understanding what they need from AP automation.

Even if you feel certain you understand your business requirements and how you intend to transform accounts payable, if you haven't mapped your AP process, you're almost guaranteed to miss critical needs which, if not addressed, create significant downstream impacts at scale and ultimately lead to purchase regrets, protracted implementation times, or solution ineffectiveness.

**A well-articulated process map will guide your buying team, protect against negative downstream impacts, and help ensure your business needs are truly addressed by the new AP automation solutions you choose.**

Early in [our guide](#) to AP automation buying we addressed your [strategic business problem statement](#). If your strategic business problem statement is the north star of your AP automation buying process, your AP process map will be just that – a map that guides your decisions to confirm you are still headed toward your north star.

Take the example of one of our clients at Direct Commerce. A multi-billion dollar food distribution company came to Direct Commerce asking for a full suite solution for AP automation. This was their final [strategic business problem statement](#): 

*We're looking for an AP automation solution that will unify multiple business units around a single process that will automate the resolution of encoding errors, track and automate supplier dispute processes, and deliver confidence-building data and processes that align stakeholders while reducing supplier communication.*

We then set out to map their business process together. We referred to the AP organization chart and mapped the stakeholders. We detailed the tasks they performed on a daily (and sometimes hourly) basis, what data they used and from which systems that data was ingested, and the decisions and actions that needed to be made (more on how to create a process map on the following pages). One critical piece of information that this process map revealed was that across their business units, they had multiple ways of encoding variances. This drove us to a deeper understanding of the types of variances across business units which hadn't come up in our initial conversations or in their documentation of solution requirements. Direct Commerce was able to deliver a single process and align stakeholders to a guided workflow for encoding a complete list of variances, eliminating redundancies, speeding up time-to-close, and unifying their multiple business units, a clear win according to their strategic business statement.

**A well-articulated process map for accounts payable will allow your AP automation buying team to:**

- **Confirm your new solution will meet all critical business needs**
- **Bring all key stakeholders into the buying process, including the daily AP operations team, managers, and even executives**
- **Address and assess all requirements before choosing a solution, minimizing implementation delays and buying regret**

# How to Create an AP Process Map

If you have already mapped your business process, good job. Bring those maps to your buying conversations and share them with solution providers in a series of meetings that allow solution providers to understand your business scenarios, cross reference them with the solution they provide, and demonstrate how they can directly impact your business.

If you don't yet have an AP process map for your business, here's what you need to know to build one.

## Definition

A business process map is a visual display of stakeholders, data, actions, decisions, and process outcomes, and it is usually articulated in some type of process flow diagram. It can also display tools and other software solutions involved in completing a process.

For AP automation buying, you'll want to build a process map specific to AP functions like invoice capture, variance management, dispute resolution, or discount management. You should create a map for any process you're looking to elevate through solution buying.

## Focus first on your current AP process, not your ideal AP process

Creating an AP process map will likely take some time, but because it is foundational to your AP automation buying strategy, you'll want it to be detailed, thorough, and grounded in the reality of your current way of doing business.



Your AP process map will align your buying team, uncover missing business requirements and help you evaluate possible technology solutions based to make sure they fit your business needs.

For most of the potential clients we work with at Direct Commerce, our first suggestion is counterintuitive: do NOT start by mapping your ideal AP process. Start instead by mapping your current process. This will give you the greatest insights into what parts of your process you need to replace, remove, retain, or transform.

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## Creating your AP process map

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You'll need to map five parts of your process:

- Stakeholders - Supplier team members as well as members of your team including accounts payable, procurement, data, receiving, etc.
- Actions - The steps of your process that must be taken in order to keep your process moving forward and in compliance with your business requirements
- Decisions - The choices a stakeholder will make that create two or more process outcomes
- Data flow - At what point of your process does data enter? How is the data managed? Who is responsible for managing the data during the process?
- Starting points and outcomes - The initiating and concluding points of your business process.

### Identify and Interview Stakeholders

To begin, create a list of all stakeholders in your AP process. This is likely members of your AP team but may also include sourcing, procurement, data, receiving, and others.

You'll also need to identify supplier stakeholders. This will include AR team members but may also include other members of their team.

After you've identified stakeholders, interview them about their process. If you're mapping, for instance, the process of handling variances, ask your AP team about their current variance handling process.

Here are sample questions you might ask:









- At what point of the current process is a variance identified? (Starting point)
- Once a variance is identified, how is it recorded? (Action)
- What data is captured about the variance? Is the variance encoded? (Action)
- Who is responsible for doing this encoding? (Stakeholder)
- Once the variance is properly recorded, what happens if you don't have enough information to resolve the variance? (Decision)
- Who is responsible for supplying the necessary information to resolve the variance? (Stakeholder)

During this interview be as detail oriented as possible. These interviews will greatly inform the AP process map you create.

## Draft your AP process map

There are a number of different types of process maps, including flow diagrams, data diagrams and others. For AP process maps used during solution buying, we suggest using swimlane diagrams which allow you to map all parts of the process including stakeholders, actions, decisions, and data flow.

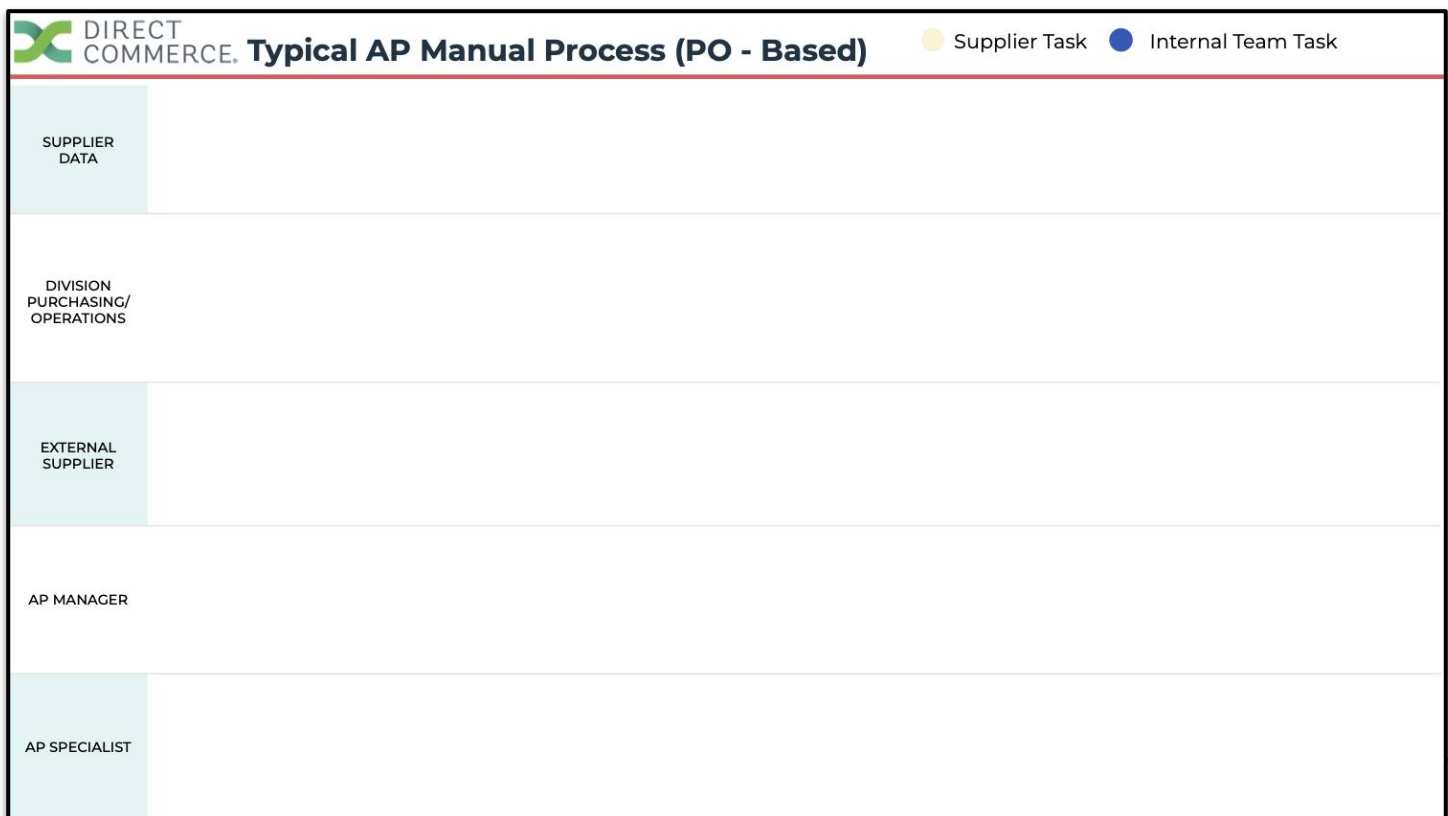
Using your stakeholder interviews, enter each piece of information using the appropriate graphic representations. Conventions for process mapping include:

Start/End		Financial System/Database	
Process Step		Document	
Decision		Page Connector	
Happy Path		Unhappy Path	

# Sample: Mapping an invoice capture process

Using the stakeholder interviews you've done and the graphic conventions mentioned previously, these are the steps you should take to map a typical enterprise invoice capture process:

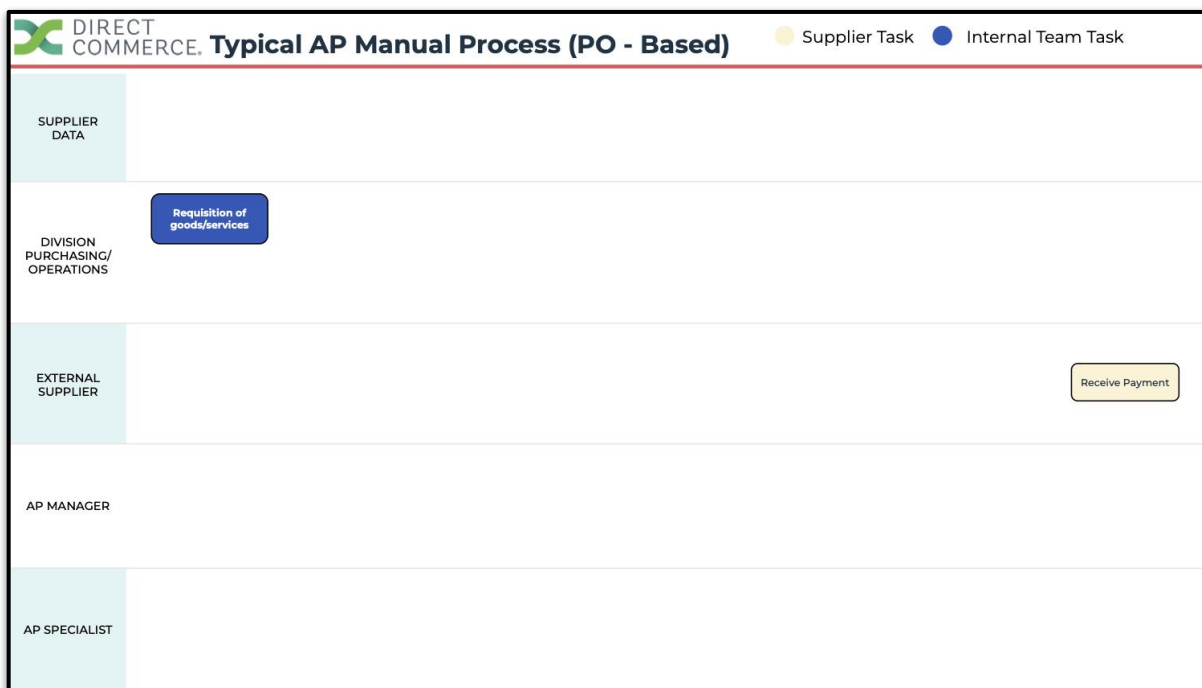
First, create swimlanes for each stakeholder:



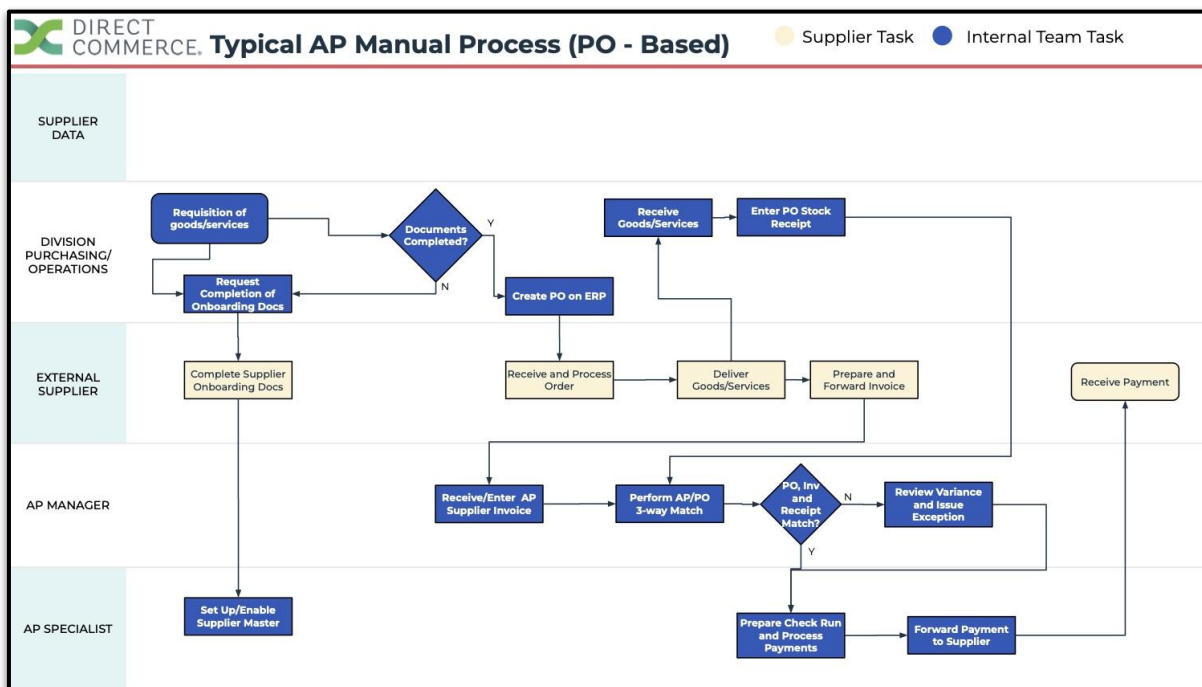
You'll notice in this scenario we have one supplier swimlane. You may have more than one depending on the detail you discover in your stakeholder interviews. We've also prepared to color code supplier tasks and internal team tasks so that it's visually easier to distinguish between the two. These swimlanes should include each stakeholder in your current process.



Next, add your start and end actions. Where does the process you want to transform begin? In this case, we're mapping invoice capture, processing, and release to payment. The first action isn't the receipt of the invoice, but actually the requisition of goods and services. The process is complete when the invoice payment is received by the supplier.

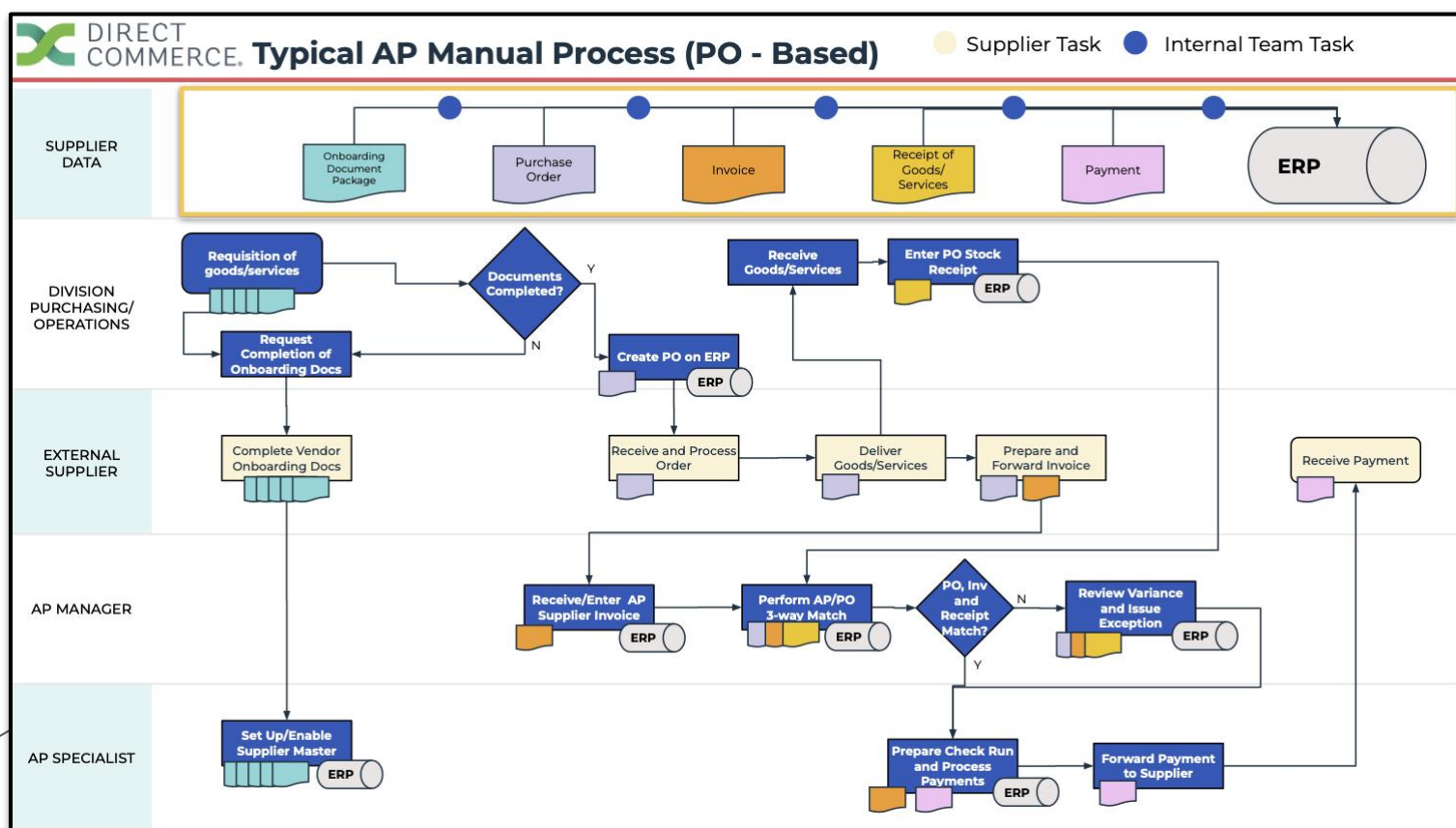


Now, dig into your notes from your stakeholder interviews. What actions take place after the process is initiated? What stakeholder decisions need to be made? What actions take place after those decisions are made?



Finally, add data inputs. This step is critical to understanding the AP automation solution that will best address your business problem and achieve process transformation. An AP automation solution should not only transform your AP process but also accommodate data, managing that data throughout your process, retaining it appropriately, and delivering it to the systems and team members at the points of the process where they'll need it in order to complete their critical tasks.

In that first swim lane, record the types of documents that hold data critical to your process such as invoices, POs, and receipts. Also indicate actions within the process that include the entering of that data into systems like your ERP.



After you've mapped stakeholders, process initiation and conclusion, actions, decisions, and data management, you're ready to review your process map with stakeholders.

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# How to use your AP process map for AP automation solution buying

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## **Review your AP process map with stakeholders to ensure completeness and avoid buying risk**

Before mapping your process, your buying team could easily miss information critical to successful AP automation buying. Now that you've mapped your process and accounted for each role, action, and decision, as well as data management methods, you've created a near complete understanding of what parts of your current process are critical to how you do business now. Before you begin using this map in your buying process, review it with internal stakeholders. Ask stakeholders for any parts of the process that are critical to their work that aren't yet represented on the map. Ask them to also identify any data critical to the process that isn't yet represented. Then refine the map to include these, finalizing a complete AP process map for your business.

## **Revisit your strategic business problem statement**

A complete AP process map will give critical depth to your understanding of your [strategic business problem statement](#). Revisit your strategic business problem statement (and use [our guide](#) if needed). Are there any questions you need to ask now that you know your process more deeply? Do you need to make any adjustments to your strategic business problem statement? If you've discovered something in your process you hadn't previously considered, ask yourself now a series of 'why' questions. Does this new discovery already relate to a concern you've addressed in your strategic business problem statement? Or do you need to make sure you add to your statement so that your buying team understands your buying needs more completely?

Use this time and your completed AP process map to ensure all buying requirements are including in your purchase decision.

**Once you've narrowed your buying process for AP automation to a few solution providers, bring your AP process map to solution provider meetings to make sure their offering is aligned with your needs.**

With your AP process map complete, you will understand what actions and data are critical to your process. You'll understand process timing, and you'll begin to complete a picture of how you can increase the velocity of your process while maintaining stakeholder compliance to your business requirements.

While your AP process map articulates how your business performs account payable functions *before* transformation, looking at your current process should allow solution providers an opportunity to articulate how they understand your business needs, your buying priorities, and the transformational outcomes their solution will provide to your business

In those conversations with potential solution providers you'll be able to:

- Present your business problem with accuracy
- Identify inefficiencies and parts of your process that can be transformed or even eliminated
- Ask solution providers to review your AP process map and return to you with a demonstration of how their solution will impact your specific business needs
- Review potential solutions with an understanding of what parts of your process they will transform. Will they replace critical actions? Will their solution be able to make decisions for your business where human intervention had previously been necessary? Will they be able to manage the volume of data AND make it available, compliant, and meaningful to critical parts of your process?
- More deeply align your buying team to the process being transformed, equipping them to thoroughly evaluate AP automation solutions based on the current state of your business and your ideal future state.

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## Next Steps

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In the next part of our [Enterprise Leader's Guide to Buying AP Automation](#), we talk about establishing critical KPIs when buying an AP automation solution. We'll use the strategic business problem statement and your AP process map to identify the most impactful KPIs when buying a solution that will transform accounts payable.

As you embark on creating your AP process map, we at Direct Commerce realize the task can seem daunting. **After more than 20 years helping the world's largest businesses purchase and implement enterprise AP solutions, we guide teams through process mapping to ensure they find the solution that best fits their goals.**

If you need outside expertise to help create your AP process maps, reach out to us at [info@directcommerce.com](mailto:info@directcommerce.com). Our AP automation experts will help you create process maps that ensure complete understanding of your business problem. We'll guide you in the use of these maps as you engage with solution providers, and we'll show you how we've taken the processes of the world's leading businesses and transformed them without compromising compliance, risk-reduction, and critical improvements.

Direct Commerce provides SaaS accounts payable automation solutions to the global enterprise. With 23 years of best practices and many of the world's largest businesses as customers, our platform streamlines AP business processes, enables supplier self-sufficiency and drives transparency and measurable ROI across your organization.

Find out more at [www.directcommerce.com](http://www.directcommerce.com)