

12 TIPS TO BOOST E-INVOICING ADOPTION

AND IMPROVE CUSTOMER EXPERIENCE



FINDING SUCCESS WITH THE RIGHT STRATEGY

In these changing times, the adoption of electronic invoicing (e-invoicing) more important than ever. And while some customers may still be slow to embrace e-invoicing, fortunately, there are strategies your accounts receivable (AR) department can take to **make life easier for both you and your customers**, facilitate the process, and maximize the success of your AR automation and/or digital transformation project.

01

CREATE A WELL-ROUNDED PLAN

Sounds obvious but it's important. Your e-invoicing adoption initiative should only kick off after a comprehensive plan of attack is created. For optimal success, the approach should be structured and focused on three key areas:

- The **requirements and expectations** of your AR department
- The **goals and objectives** of managers, supervisors and clerks
- The **needs of your customers** (don't be afraid to check in with customers afterwards – nobody knows why a plan succeeded or failed better than them!)

02

START AN ADOPTION CAMPAIGN

Customer awareness is key. And that means working to develop a campaign to prompt action. Some common-sense ideas include: **adding an insert** with all paper invoices highlighting the benefits of e-invoicing; **featuring a marketing “blurb”** at the bottom of paper invoices, emails or customer newsletters touting the advantages; or **including an e-invoicing promotion to email signatures** of your team members in accounting, credit, collections, etc.



EXAMPLE: Check out what one Esker customer created internally and included on the bottom of paper invoices to encourage e-invoicing adoption.

TOTAL SALES	TAX AMOUNT	TAX RATE	FREIGHT AMOUNT	TOTAL DUE
\$0.00	\$0.00		\$0.00	\$0.00


Sign up for e-invoicing and save time as well as the environment!

Electronic Invoicing – Good for You, Great for the Environment

Our new electronic invoicing gives you the benefits of increased accuracy, security and timeliness.

- Email directly to another department for questions or authorization
- Save and file for quick referencing at any time
- Faster and more secure than traditional mail

Go online to find out more and enroll today!



03

TARGET THE RIGHT CUSTOMERS

When it comes to targeting your audience, we recommend following the old 80-20 rule (also known as the Pareto principle) by identifying the **20% of your customers** that generate **80% of your invoice quantity**. These are the top-tier folks you're going to want to engage with first. If a handful buy into your e-invoicing adoption efforts you're likely to see noticeable improvements.



EXAMPLE: One Esker customer found an **85% success rate** in moving their targeted customers to e-invoicing.



04

BE PROACTIVE — NOT PUSHY

Your customers know when they're getting the same old sales pitch. Try standing out by replacing automated calls with one-on-one conversations or sending one highly targeted email instead of a slew of easily overlooked email blasts. Lastly, know when to throw in the towel. **If a customer says "no" it's not the end of world.** Plus, your ability to handle it respectfully can only help you should they reconsider e-invoicing in the future.

05

SPREAD THE WORD

Even if your adoption rates are low, that shouldn't stop you from touting your e-invoicing credentials when approaching potential customers. Make them aware of the benefits from the onset. **Play the part of the forward-thinking company** always looking to improve outdated processes. Sure, they might not be interested right off the bat, but at least they'll know you're the kind of company with a commitment to high quality service.

06 BE THE EDUCATOR

Customers, like everyone else, will not be moved to act without the proper understanding. **Your task is to educate them.** Some customers may have specific concerns or objectives they're looking to address upfront (e.g., "going green"). This is another opportunity to inform them of the benefits of e-invoicing.

Focus your marketing message on what's in it for the customer. One way to do this is adding a segment to your website or other platform that highlights some or all of the advantages.



EXAMPLE: Here's what one Esker customer put on their website to educate customers on the benefits of e-invoicing.

Why switch to electronic invoicing?

Simplify invoice validation with an AP process automation system

By moving to electronic invoicing, you eliminate paper invoice handling (processing, filing, and archiving). If you are equipped with a vendor invoice automation solution, electronic invoicing removes the need to scan paper invoices for validation and integration into your ERP system.

Gain 24/7 access to invoices

Quickly and easily access your invoices online 24/7 via a web portal – for review and download anytime, anywhere.

Reduce storage costs

Reduce your storage costs and save space by electronically archiving your invoices. Take advantage of secure archiving for up to one year at no additional cost.

Comply with government regulations in over 40 countries

In certain countries, for electronic invoices to be valid, they must be archived in electronic format and include an electronic signature. We help ensure that all your electronic invoices are in compliance with government regulations.

Go Green

Take an active role in the move to Go Green! Reduce your organization's overall environmental impact by eliminating paper, conserving resources, consuming less energy, and supporting sustainability.

Did you know that it takes 25 trees to produce one ton of paper, which equals 400 reams or 200,000 pages? Act responsibly – consider the environment and convert to electronic invoicing.

Sign up today!

07 PROVIDE INCENTIVES

For some customers, the benefits of e-invoicing may not be enough. They may need a little something extra to sweeten the pot. For example, offering a small **service discount**, awarding a **gift card** or even **throwing a pizza party** for their office. Get as fun and creative as you'd like – anything that drives interest and adoption rates is a winning idea.

08 EASY TO FIND, EASY TO USE

This one's pretty cut-and-dry. If you're using a portal to send invoices and receive payments, make sure your customers can easily locate it on your website. **If it's hard to find it's hard to use.** Furthermore, you'll want to test your process for ease of use before offering it to customers, while making resources available to assist your customers should difficulties arise.

09 OFFER YOUR CUSTOMERS VARIOUS OPTIONS

Not all your customers have the same payment abilities, so in order to get as close to 100% adoption as possible, **your payment options shouldn't be limited**. Appropriate payment types include credit and debit cards,, EFT, ACH, SEPA and BACS (depending on customer and/or company location). Make it even easier for customers to pay by providing an auto-pay option. Once payment details are entered and authorized, transactions are automatically billed – no reminders or awkward collections activity needed.



MAKE IT EASY: Being a company that's easy to do business with strengthens supplier relationships and your organization's reputation. A mobile-friendly platform that provides self-service communication tools is a winning combination – allowing customers to ask questions and get answers quickly, while also giving them the ability to access and pay invoices anytime, anywhere.

10 PROMOTE & REWARD E-INVOICING ADOPTION INTERNALLY

If e-invoicing isn't a priority on your end, you can expect the same from your customers. **Increase internal visibility and interest** by trying out a number of promotional ideas. Good for morale, good for customers, good for your business.



SIMPLE STARTING POINTS:

- Encourage **other departments beyond AR** to push e-invoicing adoption (e.g., legal, sales reps, etc.).
- **Review e-invoice adoption percentage** on a quarterly basis to keep it top-of-mind.
- **Celebrate increases** in e-invoicing adoption rates with all team members who were involved.
- Create **employee incentives** to generate excitement and friendly competition for higher adoption rates.

11

ESCALATE INVOICE DELIVERY METHODS

Not all customers are comfortable immediately making the change to e-invoicing from postal mail, and giving them an ultimatum isn't the best option when looking to build stronger relationships. Over time you can transition them to e-invoicing by escalating invoice delivery method: Switch customers from postal, to an email with a PDF-formatted invoice attached and, finally, to an email containing a link to a portal where they can access invoices, pay and perform other actions at their leisure.



Another good idea is to **include language on all new customer agreements or contracts** with a signature line asking for an email address that e-invoices can be sent to. This same language can also be included on renewal agreements.

If you have a customer's email address, send a piece of postal mail (you can use Esker Mail Services!) that states something like:

On [this date] we will be converting our customers to e-invoice delivery. We will be sending your invoices to [this email]. If this address is incorrect, or if you do not want to receive your invoices electronically, please contact us by [this date].

12

CONSIDER CHARGING A FEE FOR PAPER INVOICES

Paper bills are expensive. So for customers that insist on having them, some companies have taken to **charging them extra for the service**. This can be an effective option, but you have to tread lightly. If you foresee it being a nightmare for your customer service, it's probably not the right decision for your company.

GOOD LUCK!

Getting customers to adopt e-invoicing isn't always a day at the beach. But with the right amount of patience, provider support and proactive planning, we're confident you will be able to achieve greater adoption rates and optimize the performance of your Esker solution.

To learn more, please visit our website, www.esker.com, or [contact us directly](#).



www.esker.com