Business Process Automation Case Study
Process: Automating Billing Processes

CLIENT: Advertising Agency

SUMMARY

An Advertising Agency specializing in digital advertising overcame challenges in its monthly billing cycle by implementing an automated solution. The agency managed millions of ad transactions weekly but faced issues with manual retrieval, leading to potential errors and delays in client invoices. The automated solution seamlessly extracted ad information from various sources, ensuring 100% data extraction without manual intervention. Billing calculations were automated and normalized, eliminating errors and uncovering misbilling's. Integration with QuickBooks streamlined the process, reducing time and effort for data upload. The tailored automated billing workflow saved 25 hours monthly, improved cash flow, and allowed the Client Success Team to focus on revenue generation without the risk of missed opportunities.

CHALLENGES

- Managed millions of ad transactions weekly and relied on a labor-intensive monthly billing cycle.
- Time consuming manual retrieval of transactions from various sources, such as Meta and Google.
- Manual process issues were errors, incomplete data and inaccuracies in client invoices.
- Substantial delays, revenue oversights, cash flow issues and inaccurate billing calculations.
- Missed revenue opportunities, sometimes up to $60,000 per client.

SOLUTION IMPLEMENTED

AUTOMATED DATA EXTRACTION:
Seamlessly pulled and checked ad information from multiple sources, ensuring 100% data extraction without manual intervention.

CONSISTENT AND ACCURATE BILLING CALCULATIONS:
Automated and normalized billing calculations to eliminate errors and inconsistencies, ensuring precise and reliable billing amounts.
Uncovered misbilling's in the workflow, instilling trust in accurate revenue capture.

STREAMLINED INTEGRATION WITH QUICKBOOKS:
Automated the feed of data into QuickBooks.
Streamlined the invoice creation process and ensured seamless integration with the existing accounting system.

Stop wasting time & money on inefficient processes.

- **Remove Manual Workflows**
- **Save Time**
- **Increase Productivity**
- **Increase Efficiency**
- **Reduce Errors**
- **Enable Growth**
- **Drive Success**
- **Streamline Processes**

No upfront cost or IT needed

RESULTS

- Tailored automated billing workflow
- Saved 25 hours of work monthly
- Used newly found time (25 hours) to sign new clients
- Receipts of payments were quicker, improving cash flow
- Eliminated errors, ensuring accurate billing and preventing missed revenue opportunities
- Automatically increased revenue by ensuring accurate billing

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