

The Procure to Pay automation success checklist

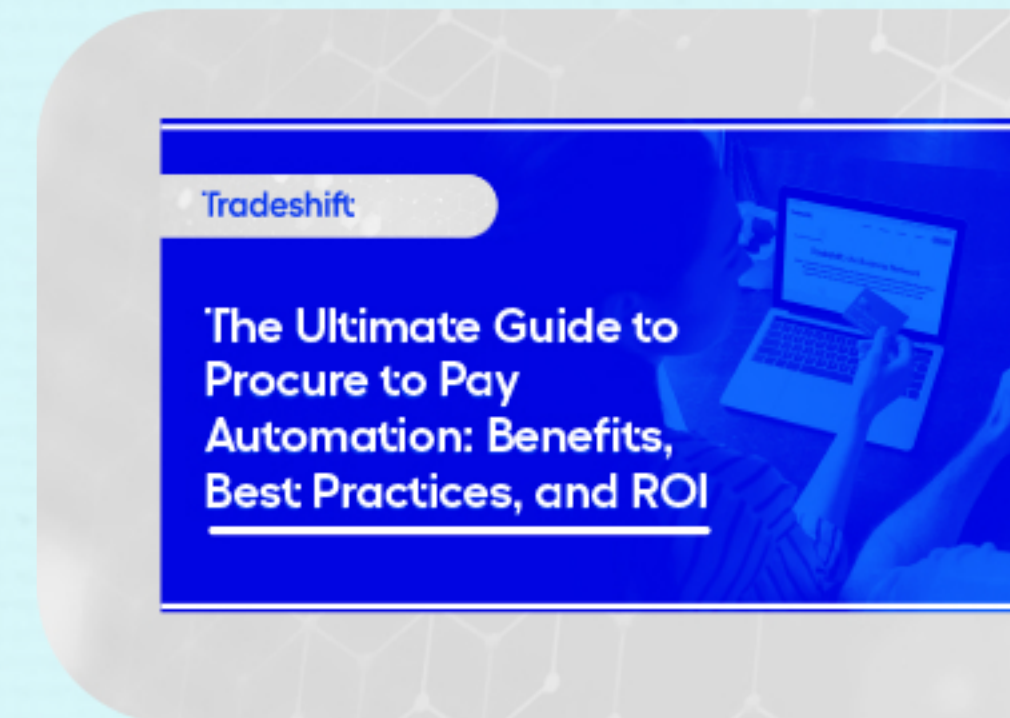
This checklist provides a clear, actionable roadmap to guide your P2P automation journey, from aligning stakeholders and optimising workflows to selecting the right technology and measuring success.

1. ORGANISATION: Lay the groundwork

- Clear alignment:** Ensure P2P objectives are unified across procurement, finance, and executive leadership.
- Stakeholder buy-in:** Secure strong executive sponsorship to champion automation goals.
- Change management plan:** Create a roadmap for a seamless transition, addressing potential resistance.

2. PROCESSES: Streamline and optimise

- Standardisation:** Audit current workflows and identify redundant or inefficient steps.
- Automation goals:** Identify high-impact areas like invoice matching, payment scheduling, and approval cycles for automation.
- Global compliance:** Evaluate readiness for regulatory mandates like e-Invoicing and VAT compliance across regions.



P2P automation guide

Stop wasting your valuable time on manual processes. Make a change with this step-by-step guide.

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3. STRATEGIES: Set a vision for transformation

- End-state vision:** Define what success looks like for your organisation (e.g., cost reduction, efficiency gains).
- Phased rollout:** Plan incremental implementation for early wins and manageable adoption.
- Supplier engagement:** Design programs to onboard and train suppliers effectively.

4. TECHNOLOGY: Choose the right tools

- Integration compatibility:** Ensure seamless connections to ERP, CRM, and other systems.
- AI and automation:** Leverage intelligent automation for tasks like data entry and invoice processing.
- Cloud and scalability:** Adopt adaptable, cloud-based solutions to grow with your business needs.
- User-friendly design:** Choose intuitive interfaces to maximise adoption and minimise training time.

5. PERFORMANCE: Measure and improve

- ❑ **KPI tracking:** Monitor metrics such as cycle times, compliance rates, and user satisfaction.
- ❑ **Continuous improvement:** Regularly review and optimise processes based on performance data.
- ❑ **Celebrate wins:** Share successes to maintain momentum and organisational alignment.

Key metrics to monitor

- ❑ **Operational metrics:** Cycle times, error rates, and processing costs.
- ❑ **Financial metrics:** Cost savings from early payment discounts and reduced manual interventions.
- ❑ **Supplier metrics:** Onboarding success, compliance rates, and satisfaction scores.
- ❑ **Scalability metrics:** Capacity to handle increasing transactions without additional resources.

About Tradeshift: Procure to Pay

Tradeshift Procure to Pay helps mid-market organisations unify and streamline their Procurement and AP processes. Its app-based platform automates every step, from requisitions to payment approvals, reducing manual work and providing real-time insights.

Powered by AI, Tradeshift accelerates invoice processing, ensures accurate purchase order matching, and supports global e-Invoicing compliance across 70 countries.

With over 3 million hours of manual work saved for customers last year, Tradeshift enables teams to focus on what matters most while scaling to meet your needs.

Got a question? Why not speak to one of our experts.

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