CASE FOR CHANGE

The case for change

Start with the work

Choose one workflow to test. Use recent evidence to explain why it comes first.

Optional discovery scoring

Desirability × Value × Urgency.
Use it if your team already does.

4.0–5.0 Act now
3.0–3.9 Plan
Below 3.0 Watch or park

Ideas scoring 3.5 or above are ready to plan.

ORGANISATION
Harbourline Distribution

EXECUTIVE SPONSOR
Chief Operating Officer

BOARD DATE
23 February 2027

The problem

Describe the issue, how often it happens and how people handle it today. What could waiting cost?

Four AP staff process 3,200 invoices a month. Keying and matching take 55% of their time. July volume is forecast to rise 25%. Expect overtime or a backlog without a change.

Workflow to test

Name the workflow and owner. Explain why it should come before the next option.

Invoice capture and matching. AP Manager owns it. Frees capacity for July. Supplier queries can wait.

Success measures

Use recent work to set a baseline. Pick one outcome and one quality or risk limit.

MEASURE	TODAY	PILOT TARGET
Handling time per invoice	*6 minutes*	*3 minutes or less*
Matching errors (guardrail)	*2.0%*	*2.0% or less*

Who measures it, when and using what? *AP Manager times samples and audits matching errors weekly.*

Six lenses for discovery

Time & throughput
Delays, queues and manual steps.

Cost & waste
Rework, duplication and wasted spend.

Quality & accuracy
Errors, inconsistency and compliance risk.

Customer & revenue
Service friction and missed revenue.

Knowledge & decisions
Siloed expertise and missing data.

Growth & disruption
Log new ideas and threats separately.

PILOT AND DECISION

The pilot and the ask

Before you circulate

Check that the request names the scope, spending cap, owner and review date.

What to take to the board

Take both pages and keep your interview notes, costs and supplier quotes handy.

Decision requested

State what the board should approve, the spending cap and when you'll return with results.

Approve up to A$12,000 for an eight-week AI invoice pilot covering 50 suppliers. Staff retain payment approval. The COO will report back on 10 May.

Pilot and tools

Set the owner, dates and scope. Explain what AI will do and compare it with a simpler option.

AP Manager starts 8 March with 50 suppliers. AI reads varied invoice layouts. Rules-based capture suits standard layouts. Compare both on handling time and matching errors.

Cost and expected benefit

List setup and running costs, the funding source and the calculation behind the expected benefit.

A$12,000 pilot from the finance budget. A$900/month to run at pilot volume. 50 hours/month saved at 1,000 invoices × 3 minutes.

Safeguards and stop rules

Set data access, review responsibilities and a clear stop rule.

AP Manager restricts access to supplier data. Staff review exceptions and approve payments. Pause if weekly matching errors exceed 2%.

Review and rollout decision

Name the reviewer and the review date. What results would justify a rollout?

The COO reviews on 10 May. Expand only if average handling time is 3 minutes or less and matching errors are 2.0% or less. Otherwise, revise or stop.

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01

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