

INDUSTRY CASE STUDY

# PROFESSIONAL SERVICES

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## ACCOUNTS RECEIVABLE AUTOMATION

Cutting AR costs **74%** with  
AI automation

**74%**

LOWER AR COST

**<2 min**

TO INVOICE

**\$312K**

CASH FLOW FREED

**0**

LAYOFFS

# Cutting AR costs **74%** with AI automation

A six-person billing team, nearly **\$494K a year**, and cash still leaking out the back. Then Simpatico rebuilt the whole thing — and **nobody lost their job**.

CLIENT	SECTOR	ENGAGEMENT	ROI
Mid-market professional services firm	Professional Services	Discovery, automation & digital worker	7 months to full payback

## — THE CHALLENGE

### A capable team, buried in manual work

On paper, the AR department looked healthy. Six full-time staff produced about 7,200 invoices a month. But a decade of growth had quietly buried four problems inside a process that was still mostly done by hand.

#### Slow invoices

01

Bills took 2–4 business days to reach clients. On Net-30 terms, that's quietly running Net-26 and never noticing the lost days.

#### Reconciliation backlogs

02

Matching deposits to invoices ate ~2.5 hours a day and still produced misapplied and duplicate payments.

#### Reactive collections

03

No consistent follow-up. Aging looked fine at 13 days, but it hid accounts sitting 25–45 days past due.

#### Hidden cash

04

\$180K–\$240K tied up at any moment — already paid but unreconciled, or one reminder away from collected.

# Four pieces of automation, one connected system

As their Managed Intelligence Provider, Simpatico ran a three-day discovery workshop, scored 31 processes for automation fit, then rebuilt AR on the firm's existing NetSuite system.

1

## Invoices that send themselves

The moment a project milestone is marked complete, an invoice is created and delivered to the client — the whole thing in under 90 seconds instead of days.

DAYS → 90 SECONDS

2

## Payments that reconcile in near real-time

Bank feeds pull in every 15 minutes, and a three-pass matching engine clears 94% of payments automatically. Only genuine edge cases reach a person.

94% AUTO-MATCHED

3

## Collections that never slip through

A consistent multi-stage sequence runs across email, text, and automated voice calls, so no overdue invoice gets forgotten. Sensitive accounts still route to a human.

EMAIL · SMS · VOICE

4

## A Digital Worker keeping it honest

It monitors for anomalies, answers routine billing questions, works the exception queue, and emails the CFO a plain-language AR briefing every morning before she's had her coffee.

ALWAYS ON

## THE RESULT

# Cash surfaced, costs cut, people freed

The automation didn't just speed things up. It surfaced cash the firm was already owed and freed people for work that grows the business.

**74%**

lower AR cost  
\$494K → \$126K / yr

**<2 min**

to invoice  
was 2-4 days

**\$312K**

cash flow freed  
on average

**7 mo**

to full payback  
after go-live

## WORKFORCE OUTCOME

### Nobody lost a job

When it became clear five of six AR roles could be automated, the CEO drew a line: no layoffs. Simpatico worked with leadership to reassign all five into revenue-producing roles — funded entirely by the automation savings.

The one remaining role was elevated too, shifting from data entry to judgment work: exceptions, escalations, and the relationships that need a human.

**"This was never zero-human. It was right-sized human."**

- AR Specialist **becomes** Client Success
- Collections **becomes** Business Development
- Team Lead **becomes** Operations Analyst
- Reconciliation **becomes** Project Coordinator
- Reporting **becomes** Marketing Ops

## HOW WE HELPED

### What a Managed Intelligence Provider does

#### Strategic Design

Structured discovery and a scored roadmap before touching a single workflow.

#### Automation & Integration

NetSuite, banking, and communication channels wired into one event-driven system.

#### Data-Driven Decisions

Real-time cash visibility and a daily AR briefing for the CFO, in plain English.

#### Continuous Partnership

Clear human escalation paths so the system stays auditable and easy to run.

# AI and accounts receivable automation, answered

## Can AI automate accounts receivable?

Yes. AI and intelligent automation can handle the repetitive parts of accounts receivable end to end — creating and sending invoices, matching incoming payments to open invoices, and running collections follow-ups. In this case study, a six-person AR team was reduced to one supervisor plus a digital worker, cutting AR operating costs by 74% while keeping a human in the loop for exceptions and sensitive accounts.

## How much can AR automation save?

In this engagement, automating accounts receivable cut total department operating cost from about \$493,840 to \$125,800 a year — a 74% reduction, or roughly \$368,000 saved annually. The firm also freed about \$312,000 in cash flow on average and reached full cost recovery within seven months of go-live. Actual savings vary by team size, invoice volume, and current process maturity.

## Does automating accounts receivable mean layoffs?

It doesn't have to. In this case, the CEO committed to zero layoffs. All five affected employees were reassigned into revenue-producing roles — client success, business development, operations, project coordination, and marketing — funded entirely by the automation savings. The model was "right-sized human," not zero-human, with people moved up to judgment work instead of being let go.

## How fast can AI send invoices?

Near-instantly. After automation, invoices were created and delivered to clients in under two minutes from the moment a project milestone was marked complete — down from two to four business days under the old manual process. Faster invoicing directly shortens the collection cycle and improves cash flow.

## What does AR automation actually involve?

It connects your existing systems into one event-driven workflow. In this build, project-management milestones triggered automatic invoice creation in NetSuite, bank feeds reconciled payments automatically every 15 minutes, and a multi-stage collections sequence ran across email, SMS, and automated voice calls. A digital worker monitored everything, handled exceptions, and sent the CFO a plain-language AR briefing each morning.

LET'S TALK

# Wondering what AI automation could unlock in your operations?

If your team is buried in manual invoicing, reconciliation, or collections, there's a good chance automation can do it faster, more accurately, and for a fraction of the cost. Let's find out together.

[Schedule a Strategy Session](#)

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