

A background image showing a man in a suit standing at a podium, presenting to an audience. The scene is overlaid with a blue circular graphic and a grid pattern.

## How ValueXPA Streamlined Invoicing and Contract Management Process for a US Software Business

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### The Problem We Solved

The client that runs a U.S.-based software product business specializes in providing innovative automation tools for various industries. The client faced challenges with their invoicing process and the management of customer accounts. The client management aimed to complete the invoicing for all customers on time, including addressing any backlogs from the past year and the current month, as well as forecasting invoicing for the next three months. However, due to the backlogs, the client was unable to invoice customers on time, failing to meet the billing target for the previous year. This also extended the cash cycle, adversely affecting cash flows. Further client wanted to complete the process within a tight timeline of 4 weeks. The client then assigned ValueXPA to address these issues and improve operational efficiency.

### What We Did

ValueXPA faced a significant challenge when we gained access to the necessary software with a delay. Because of this, the timeline was further shortened to address the backlog and current month's invoicing. To overcome this, we prioritized clearing the backlog of contracts, ensuring all pending invoices from the previous year were addressed promptly.

Recognizing the need for efficiency, we initiated efforts to streamline the contract management process. The client utilized an auto-renewal process for all contracts, so we implemented a system to filter contracts 60 days in advance. This allowed us sufficient time to address and process each contract effectively.

## Prioritization of Backlog Clearance and Prompt Invoicing

Cleared the backlog of contracts.  
Addressed all pending invoices from the previous year promptly.



### Streamlining Contract Management:

Implemented a system to filter contracts 60 days in advance.  
Ensured sufficient time to address and process each contract effectively.

### Resolution of Contract Renewal Issues

Promptly identified and escalated contracts lacking renewal opportunity links to Client IT and sales teams.  
Ensured corrected contracts were provided and invoiced the same day.

Those that lacked renewal opportunity links were promptly brought to the attention of Client IT and sales teams, who resolved it and provided the corrected contracts. We then focused on these resolved contracts and invoiced the customers the same day. Although our initial target was to complete invoicing by the end of February,

we extended our efforts through April to ensure comprehensive contract management.

Despite the tight timeline, ValueXPA's help in the invoicing process enabled the client to surpass their revenue booking target. ValueXPA closely worked with the client team demonstrated flexibility and worked towards meeting the tight timelines.

## How We Created an Impact

ValueXPA completed the invoicing project well ahead of the designated deadline. This early completion not only met but exceeded client expectations, ensuring that all backlogs and current month invoices were processed efficiently. The timely delivery of this project allowed the client to expand the scope of support to other areas of finance and benefit from the relationship.

This crucial partnership to collaborate with ValueXPA enabled the client to focus more on their core operations and growth strategies. By furnishing clients with effective solutions, we empowered client to navigate complexities with confidence and realization of their strategic objectives

For more information on business partnering  
please connect with us!

Write to us at [info@valuexpa.com](mailto:info@valuexpa.com)

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