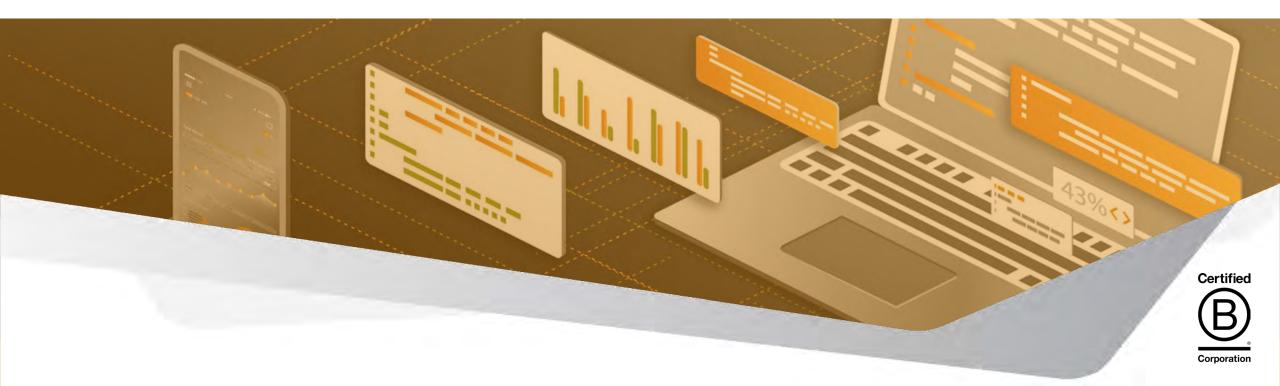WEBINAR

Mastering Workday: Ask an Expert Series

Session: Order-to-Cash Process Optimization for Workday Financial Management

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Certified B Corporation

WELCOME

Today's Expert

Justin Mitkus

Director, Consulting
Armanino

Session

Order-to-Cash Process Optimization within Workday Financial Management

- Discover expert insights on optimizing the order-to-cash process in this session.

- Explore invoicing lifecycle, revenue recognition, and reporting best practices, plus learn how machine learning (ML) features can help automate the cash application process.

Engagement Encouraged!

- **Interactive Q&A Sessions:** Get your specific Workday questions answered live by our experts, ensuring you leave with practical solutions tailored to your needs.

- **Expert Insights and Tips:** Gain exclusive access to professionals who will share valuable insights, tips, and best practices to enhance your Workday experience.

- **Real-World Case Studies:** Learn from real-world use cases that showcase how other organizations are successfully leveraging Workday to solve common challenges and drive business success.

LEAD-TO-CASH

Why you Need to Optimize

Improve Data Quality

Integrate your CRM and accounting/ERP systems to collaborate with sales and share pricing data.

Save Time

Eliminate manual data re-entry and free up your finance team to focus on strategic work.

Minimize Errors

Automate repetitive manual processes to reduce human error and costly mistakes.

LEAD-TO-CASH

Steps to a Holistic Lead-to-Cash Process

1

Lead to Qualify

Develop lead and partner relationships to turn them into customers. Sales marketing and finance teams' mange current deals and create product specs to address customers' needs.

2

Qualify to Order

Generate quotes quickly and accurately by implementing a configure, price, quote (CPQ) system. Create complex quotes customized around bundles, products, quantities and prices. With a 360-degree view of customers, you'll understand their purchase cycles and geographies.

3

Order to Cash

Handle, track and manage order life cycles with fulfillment, jeopardy and fallout analytics once orders are entered into your CRM. Manage error-prone contract amendments and dynamic terms and conditions in a unified system.

LEAD-TO-CASH

Steps to a Holistic Lead-to-Cash Process

4

Cash to Care

Leverage your streamlined lead-to-cash process to provide customers effective resolutions for billing inquiries, troubleshooting and customer service.

5

Retain to Grow

Drive strategic growth by nurturing your valued relationships with customers. Provide AI-powered analytics and recommendations, create custom loyalty programs or offer self-care functionalities. Better identify cross-selling and upselling opportunities.

armanino

Thank you for attending

Additional Questions?

Reach out to us at

Experts@armaninio.com