**Invoice Management Web Page Wire Frame**

**Page Title/Umbrella Message**

Centralize Invoice Distribution & Follow Up

**Problem We Solve/One-Liner**

Must be above the fold. User should not have to scroll down to see this.

Invoicing tends to get immersed with paperwork, multiple emails, and phone calls. Our online Invoice Management tool helps Payers organize their invoice documents and communications in one place. This lets them invoice and follow up on payment without taking as many steps.

**Opening Image**

Must be above the fold. User should not have to scroll down to see this.

For HPS product pages, the image should convey what the product is. It doesn’t necessarily have to be an image of the product; even a conceptual illustration would be fine too.

**Call to Action**

Center text in the middle of the page. Must be above the fold. User should not have to scroll down to see this.

Schedule a demo to begin automating your invoicing efforts in your portal.

(Schedule a Demo)

**What we do/what our product does. Benefits/Features**

How the portal helps them get what they want.

Streamline Invoice Communications & Management

Manual invoicing processes are time-consuming, costly, and frustrating. Use the Invoice Management solution to streamline your invoicing processes, save time, and get paid faster. Here’s how:

1. Create templates for invoicing notifications
2. Upload monthly invoices
3. Your customers are notified when there’s an invoice for review
4. Your customer approves the invoice online
5. You have more time to focus on other important tasks

Your online invoices are available 24/7, and customers can access their invoices along with their claim and benefit details in your portal. This saves you from maintaining separate invoicing portals and centralizes your invoicing efforts in one place.

**Value Stack**

What do they get when they buy our product?

Drive Invoicing While Minimizing Manual Effort

Payers use the Invoice Management solution to keep the invoicing process moving forward without manual intervention. It also empowers them to manage and track invoicing every step of the way.

1. Permanent online storage of invoices
2. Record of invoice reviews & approvals
3. Automatic reminders to review invoices
4. Tools for posting comments to your customers or your internal team

Schedule a demo to begin streamlining your invoicing efforts in your portal.

(Schedule a Demo)

**Testimonials / Success Story**

To be used on the web page if available. BMA Invoice Management success story should be available for download. User should have to enter their email address in order to download the success story.

Since using the invoice management tool, our staff has had several new-found hours every month to focus on other priorities. It’s exciting to see how quickly invoicing gets done because we’re no longer doing things manually.

Tomas Perez

Controller

Benefit Management Administrators

(Download Success Story)

**Stakes / Overcome Objections**

Save Time & Money

By using the Invoice Management solution, you’ll avoid the manual invoicing processes that consume time and money. Instead, you will:

1. Automate follow up on unapproved invoices
2. Eliminate the need to re-send invoices to customers
3. Save the time and efforts of maintaining separate invoicing portals
4. Easily track and communicate about invoice updates

Organize your invoicing processes and communications into your portal and experience time savings from your automated invoicing workflows.

**Plan & CTA**

Last reminder to the reader: Don’t do this. Do this and experience this.

Spend less time invoicing and more time getting paid. Consolidate your invoicing processes online so you can save time, invoice faster, and drive payments sooner.

(Schedule a Demo)

**Images of Success**

These are ideas of what types of images we could use throughout the web page. As long as the image conveys the positives of using HPS products and or what success of using our portal looks like, I’m totally open for ideas.

Image with online invoice testimonial.

Computer with invoicing web page

**Invoice Management Web Page Brainstorming**

**One-Liner**

Invoicing tends to get immersed with paperwork, multiple emails, and phone calls. HPS’ online Invoice Management tool helps Payers organize their invoice documents and communications in one place. This lets them invoice and follow up on payment without taking as many steps.

**Subject Line:**

Online Invoice Management

Disorganized invoice management - whether through invoicing portals or email-based invoicing, creates more administrative hassles for you and more confusion for your customers. Your customers have to remember where to go for their invoices and the separate login information they need to access them. They often can't remember these details and contact you to walk them through this access (again).

Disorganized billing processes are costing you time for managing different processes for invoicing. It's also hindering what you absolutely need your clients to do - pay their invoice.

Let online invoicing organize your billing processes and facilitate more consistent invoice payment. Here's how:

HPS' online invoice sharing solution lets your company organize your invoicing processes in the same place your clients are already going - your web portal. With a few clicks, your Accounting team can upload the monthly invoices for each of your clients, which are stored permanently in your secure, HIPAA-compliant portal. The portal automatically emails your clients prompting them to log into your portal to approve their invoices. If they need reminders, the portal sends those automatically too.

When your clients log in, they'll be able to review and respond to invoices you've loaded, in addition to the health plan details they're already accustomed to seeing. You will have a report of which clients have reviewed & approved their invoice, saving you from having to manually gather those details yourself. And if your clients have questions or need access to previous invoices, they can find those details themselves in your portal. You don't have to spend time re-emailing them.

Organizing your invoicing processes online simplifies the payment processes for your customer. It also saves you time from:

1. Manually emailing invoices securely to each client
2. Explaining and reminding your clients which portal they need to go to for invoices
3. Managing and maintaining a separate invoice portal or secure email solution
4. Re-sending invoices when clients can't find them

Online invoicing also saves you money and improves your cash flow because:

1. Clients can pay invoices faster and more easily
2. You don't have to pay for a separate invoicing portal or secure email solution
3. Staff time saved from eliminating manual invoice process will boost your team's efficiency

Organizing your invoicing processes online will improve your internal operations but it will boost your reputation with your clients too. Your clients will appreciate the simplicity of going to one portal for all their health plan-related needs, and they'll love having one less username and password to remember.

Start organizing your invoicing processes online today. Schedule a demo to learn about the next steps.

**1. A Character**

Payer

TPA

Carrier/Health Plan

Multinational Insurance Company

Story Gap – What does the customer want?

To get paid on time.

A simpler, faster way to invoice clients

A hassle-free way to coordinate customer billing

**2. Has a Problem**

Products we sell should solve internal problems, not just external ones.

**Villain**

Our customers are fighting against…

Manual billing processes

**External Problems**

1. Teams spend too much time distributing bills and following up to collect payment

**Internal Problems**

1. Frustration about billing & payment turnaround times
   1. Will I ever be able to invoice and collect payment in time?
   2. If we can’t bill efficiently, how can we expect our clients to pay quickly?
2. Will we ever free ourselves from these manual processes?
3. Embarrassment: Our outdated billing processes are making us look bad

**Philosophical Problems**

Why is it unjust for the hero to suffer at the hands of the villain?

1. Hard work deserves timely payment

**3. And Meets a Guide**

They are looking for a guide, not another hero.

Our company and our products are the guide to help the hero solve the problem.

Guide must be empathetic (I know this is frustrating for you. Many of our customers have struggled with this…) and competent. “I know what you’re going through and I can help you get through it.”

Empathy

1. We know how frustrating it is to spend an unnecessary amount of time on manual, paper-based processes
2. We know how costly it is to have manual invoicing processes. Not only does it keep you from being paid on time, you also waste time and money in trying to keep up with manual invoicing.

Authority

1. Case studies

HPS helps you:

1. Consolidate your invoicing processes into your existing portal
2. Convert your manual, email-based workflows into automatic ones
3. Save time from manually following up on unpaid bills
4. Keep your invoicing documents secure

**4. Who Gives Them a Plan**

Process Plan (Website & Sales Sheets)

1. Schedule a Demo and Discuss Your Requirements
2. Review a Portal Proposal Targeted to Your Business
3. HPS Implements Your Portal
4. Enjoy a More Organized Business that has Greater Efficiencies and Growth

Process Plan (Proposal)

Same as General

Implementation Plan

1. HPS loads your group data from your claim system into your portal and configures your online invoice management solution
2. You create templates for invoicing notifications
3. You upload monthly invoices
4. Users are notified every time there’s a new invoice for review
5. Your invoicing team now has more time to focus on more important tasks and you will enjoy timelier payment.

**5. And Calls Them to Action**

Direct Call to Action: Schedule a Demo

Transitional CTA: Download Success Story

Worksheet:

1. How much is manual invoicing costing me?
   1. Time spent emailing out an invoice for one client + time spent manually following up on payment = total time per client per month
   2. Total time per client per month x # of clients = total hours per month
   3. Total hours per month x hourly wage of your invoicing team = Total cost per month
2. Hidden costs of manual invoicing
   1. Time spent doing manual follow up
   2. Cost of human error – what if the invoice with PHI is accidentally sent to the wrong person?
   3. Cost of disruption: When customers need help finding an old invoice or resetting the password for their secure email account, this disruption will make your employees less efficient in their everyday work
   4. Secure Email portal costs
   5. Communications with clients or each other reside in emails, which your invoicing team members may not have access to.

**6. That Helps Them Avoid Failure**

What are the stakes? What are the costs of not doing business with us? What will the customer lose when they don’t do business with us?

1. They’ll spend several days every month devoted to manual processes
2. Delays in billing will cause the Payer to get paid later than they should
3. Disruptions and manual efforts will continue to make staff less productive

**7. And Ends in Success**

What is the happy ending clients will experience?

|  |  |  |
| --- | --- | --- |
|  | **Before HPS** | **After HPS** |
| What does the customer have? | A days-long process of creating and sending invoices.  Manual follow up efforts and reminders.  Longer turnaround time for getting paid.  A totally separate portal system specific to invoicing.  Lack of accessible invoice access for clients and Payer. | Monthly invoicing cut by X% (see BMA case study)  Follow ups and reminders are automatically sent.  Payment is quicker because clients are regularly informed.  Invoicing is handled in the same portal as customer service. No need to reinvent the wheel with a separate portal specifically for invoicing.  The Payer and its clients will have a permanent record of invoicing records available 24/7. |
| What are they feeling? | Annoyed at how long it takes to get things done.  That the manual processes are unnecessary  Frustrated that as soon as they finish this month’s invoicing, it’s time to start on next month’s invoicing. There’s little time in between to do more meaningful work.  Badly that they have to follow up with their client (again) about payment. It’s necessary, but they don’t like feeling like a beggar.  Irritated knowing that their staff could be more productive. | Delighted at how quickly things get done.  Positive, knowing that manual processes are minimized  Giddy at all the new found time they have to do more productive work on more complex issues.  Relieved that they don’t have to be the “bad guy” who’s regularly asking for money.  Happy knowing that the team is more productive. |
| What’s an average day like? | Manually emailing invoices through a secure email portal.  Manually re-sending invoices when clients couldn’t find the previous email.  Helping clients reset passwords for their separate secure email account.  Manually tracking who has approved invoices and who hasn’t.  Manually following up with clients who still need to pay. | Checking for updates on who has paid.  Only focusing on incorrect invoices, not resending them.  No more account management efforts. Customers are already using a portal account they’re familiar with.  A list of who has approved invoices is sent to them each day.  Follow ups are automatic. Accounting only intervenes when lack of payment needs to be escalated. |
| What is their status? | A vendor from the 20th century  Behind the times with billing processes  Disorganized  Unaware of updates and needs | A company who understands technology and uses it effectively  Organized, in control  In the know about what’s going on with each client’s payment status. |

**What External Resolution will look like**

What is the visible evidence that the problem has been solved?

(Teams spend too much time distributing bills and following up to collect payment)

1. Invoice distribution is reduced from days to hours
2. Invoice payment follow up efforts are virtually eliminated
3. Teams are no longer spending time re-sending lost invoices
4. Teams no longer have the time and expense of maintaining another separate invoicing portal.

**What Internal Resolution will look like**

How will the buyer feel when the external is resolved?

Frustration about billing & payment turnaround times

* Will I ever be able to invoice and collect payment in time?
* If we can’t bill efficiently, how can we expect our clients to pay quickly?

1. At peace that they’ve done everything they can to ensure timely billing and payment.
2. Excited that their accounting teams have more time to work on more complex issues
3. Confident that they’re working as effectively and efficiently as possible to get paid.
4. Excited to see payments coming in in a more timely manner.

**What Philosophical Resolution will look like**

Why will the world be a better place because of these resolutions?

(Hard work deserves timely payment)

1. We’re paid on time for our hard work and efforts.
2. We’ll have more steady cash flow to fuel future business growth.

**How can HPS offer our customers status?**

1. Will have a reputation of being organized in all areas of the business, including Accounting.
2. Will be seen as having a reputation for being cutting edge with technology.

**How can HPS offer wholeness or completeness?**

1. We have the technology we need to bill on time and collect in a timely manner.
2. We’ve freed up so much time that we can now take on bigger, more important projects.
3. We’ve saved so much money from not having to pay for a separate billing portal and paying for staff time needed for manual processes.

**How can HPS offer self-realization, self-acceptance, or help customers reach their potential?**

1. A sense of self-worth because they know that their invoicing processes are under control and virtually free of manual follow up processes.
2. Confident that they’ve overcome the draining manual processes so that they can achieve bigger and greater objectives with billing & invoicing.

**8.** **Transformation**

**How do our products make clients a better version of themselves?**

Invoicing is automated and technology-based.

Invoicing is unencumbered by manual processes, and inconsistent communications

They get paid faster and more efficiently

By minimizing the number of manual processes and follow ups

By avoiding duplication of work (particularly re-sending invoices)

Conserving staff time for better usage

Getting a steady paycheck because they’re doing steady, consistent invoicing

**Who does our customer want to become?**

A payer who has invoices organized, tracked, managed, and under control.

An accounting department that knows what they’re doing and is efficient

In control and on top of things accounting-wise

Effectively leveraging technology

Making invoicing easy and secure for their clients.

**What is the climactic scene they want?**

Invoices are getting approved without manual follow up efforts. Invoice approvals come in without your team spending time to go get them.

Re-sending invoices manually is eliminated

After the invoices are posted, they’re approved almost automatically. There is little to no effort involved to get clients to approve them. The portal drives approvals automatically.

**What is their aspirational identity?**

Efficient

Automated

Fast

Aware and knowledgeable.