

## **Business Context**

Providing advice on automating payment procedures for the IT company Onderwijs in Beeld

### **Description of the problem**

At Onderwijs in Beeld, the cash flow process for customer payments such as invoices and webshop orders are not automated, this costs a lot of time and effort to upkeep, which is why automating this is very beneficial especially since the company wants to grow their customer base twenty-fold.

At the start of every school year (for all ~140 existing customers) as well as when a new customer orders one of their service packages, Onderwijs in Beeld has to manage the entire payment process step-by-step manually by sending invoices to the customers and providing other information via email.

Right now the customer base is around 140 schools, but the goal is to grow to around 2000 schools in the next 5 years. In preparation for this, a new workflow for the invoices and sending materials to customers needs to be introduced.

Stijn mentioned that he eventually wants a single employee managing and keeping an overview of all the customer payments so the rest of the employees can focus on their other important tasks.

### **Goal**

- To have less direct contact with the customers regarding getting started as well as notifying them about their invoices.
- To spend less time on invoices and sending out packages for schools.
- To ensure the customer's experience is more intuitive and seamless in terms of getting started and receiving help when needed.
- To still have control on applying discounts in edge cases.
- It will become possible for customers to upgrade plans themselves.

### **Solution**

An automated process that happens on the order of a new customer as well as annually on the start of the school year in September. There will be a need for a back office manager to check and execute the invoices and 'getting started' process.

A back office manager is the one responsible for:

- checking customer payment statuses (moneybird);
- invoices;
- additional emails with instructions -> Maybe for sales;
- sending packages;

- applying discounts -> For sales.

A simplified chain of events would look something like this:

1. School year starts or new customer orders the service;
2. The system is notified and the back office manager gets an email or notification
  - a. If relevant, the back office manager can select to apply a discount for this customer on the payments;
  - b. In case of a new customer:
    - i. The first login is awaited and a form needs to be filled in by the customer OR salesperson.
    - ii. Based on this form the back office manager gets a notification on which package the customer wants and selects to send out the materials for that package.
3. An invoice is created by the backend service and uploaded to Moneybird automatically and sent out by email to the customer;
4. Moneybird keeps track of the payment completion, and if not paid within a certain period of time, a reminder email is sent to the customer.
5. The back office manager then checks an overview of all of the payments and confirms if all have been paid.

## In scope

- When a school applies for the first time, they receive a manually sent out email with instructions on how to start and log in for the first time. -> First one is to ensure customer success and the next one is automatic for instructions for the team
- When the customer logs in for the first time, a form is shown which they have to fill in. Based on the choices of this form, an appropriate package is sent to the customer by the back office manager.
- If there are difficulties in the login process or it takes too long, the back office manager should get notified and send out an additional email with instructions. -> This can be automated
- Having access to the Moneybird API is essential to automate the invoice processing in order for the customers to receive:
  - their invoices;
  - an automated reminder if the payment was not successful in the given time period.
- Packages sending out and shipping

## **Not in scope**

- Privacy and security may not be within the immediate scope of the project, which is already filled with the automation of the invoice process (already handled by moneybird).
- The webshop ordering management and shipping.

## **IST**

- Licenses: Add a Branch Number, the school information is automatically loaded in a form. Then an account is added from this. From this point a license is made. To deduce which tier a customer wants.
- Sending invoices for each new year is not automated.
- Free trials by delaying sending invoices.
- Customer success service exists, which keeps track of the customers' app usage.
- Invoices: Based on the tier, it can be either a fixed invoice or a variable fee based on the amount of students and a discount based on which time they started.  
Starting date is important  
Which type of product  
Number of students (for the complete package)  
Name of the school  
Email of the contactee  
Edge cases -> Discounts  
Invoice is sent annually but not automated

## **SOLL**

- When a new school applies for OIB, a manager should get an email and see that specific products should be sent out. Send a test-out package of materials first.
- When a sign in is done for the first time, they select which products they are going to use. Based on this send out the desired package.
- When a customer is struggling, send out an email to them automatically with guides how to get started. Have an overview of the priority customers to be contacted.
- Adding discount visuals in the application, so the customers see the better deals
- Upload the invoice to moneybird, moneybird sends out the invoice