TEAM 3

Challenge Card #3 – Finance invoicing process

Problem — what is visible today?
External certification customers do not always know when they will receive the invoice, what exactly they need to pay, or how the overdue amount relates to the project status. Internal business and finance colleagues also do not always understand the invoicing and collection process, so they need individual guidance from the AR / Finance team.

Business consequences — why does it matter?
When customers and internal colleagues lack clarity, payments are delayed, clarification requests increase, and AR / Finance teams spend more time explaining invoice status instead of collecting payments.

Main users affected by the problem

- External certification customers
- Business colleagues
- Local finance teams

What is expected from the team?
Understand what customers and internal colleagues need to know at each stage of invoice delivery and overdue-payment clarification.

Important KPI for the business
On-time invoice delivery rate — percentage of invoices delivered to customers within the agreed timeframe.

Baseline: 76% of invoices are delivered on time.

Target: 90% of invoices delivered on time — increase by **14 percentage points**, which means an **18% relative improvement**.

Working challenge
How might we improve the invoicing experience for external certification customers, business colleagues and local finance teams so that customers receive invoices on time, understand what they need to pay and know what to do next, while AR / Finance teams can reduce repeated clarification work?

Map stakeholders for your challenge

Use your challenge card and list all people or groups connected with the process.

Place them on the map based on:

Interest — how much they care about the problem or are affected by it.
Influence — how much they can affect the process, decision or implementation.

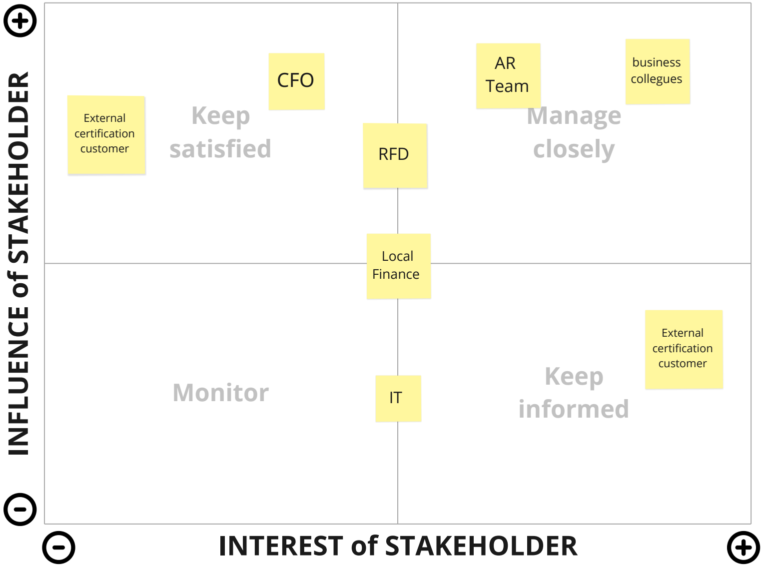
Map four groups:

- **High interest / high influence**
  Key stakeholders. Talk to them early and involve them closely.
- **High interest / low influence**
  Main users or affected groups. Important for empathy interviews.
- **Low interest / high influence**
  Potential blockers or decision-makers. They may not feel the problem, but can stop or enable change.
- **Low interest / low influence**
  People to monitor. They may be less important for interviews now.

Output

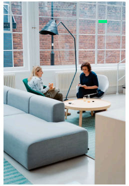
Select **2–3 people or groups** you would interview first in the empathy phase.

Sticky notes



TASK – DESIGN AN INTERVIEW

1. Use the stakeholder map from the previous exercise.
2. Choose one group to interview — preferably users.
3. Discuss:
   - What hypotheses do we have about the source of the problem?
   - What do we want to learn?
   - Which questions could reveal valuable and non-obvious information?
   - Which questions will help us learn stories, facts and real experiences?
   - Which question could reveal the "faster horse" — what users think they want?
   - What would be useful to see or experience first-hand?
4. Output: Brainstorm questions, then turn them into one coherent interview guide.

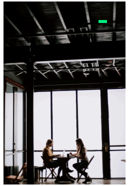


EXAMPLE QUESTIONS

- Tell me about the last situation when...
- What was difficult?
- Why was it difficult?
- How did you feel at that moment?
- How often does this problem happen?
- How do you deal with it today?
- What have you already tried?
- Why was the current solution not good enough?
- How much time or effort does it cost you?
- Where do you look for information or support?
- What keywords would you use to search for this topic?

HOW TO CONDUCT A INTERVIEW?

- Ask open-ended questions.
- Encourage stories.
- Do not suggest the answer in the question.
- Go deeper using the "5 Whys" method.
- Make the interviewee feel comfortable.
- Document answers: recording, notes or an AI note-taker.
- If possible, ask the person to show the problem and its consequences.



Choosing the Interview Group

Go back to the stakeholder map from the previous exercise. Choose one group — preferably users. Note who, why, and how many people.

- External certification customer
- business collegues

Hypotheses & Goals

Sticky stock

- What **hypotheses** do we have about the source of the problem?
- What do we want to **learn**?
- What would be useful to see or experience **first-hand**?
- lack of the accurate information between groups
- how the business and customer communicating and expectation
- visible KPI/manual for the invoice delivery

Stories & Experiences

'Tell me about the last time...'

Sticky stock

- what was the last time you had difficulty to obtain information ?
- how often these problem occur?
- What solutions have you tried
- Where have you looked for information?

Non-obvious & Deep

'What if...', 'Why specifically...'

Sticky stock

- What did you do if the information stuck in some place?
- What if you didn't find ther the information ?
- What specifically was hard to experience?
- which channel would you prefer to receive the information from?

'Faster Horse'

What users think they want — vs. what they really need?

Sticky stock

- issue the invoice on time
- regular reconciliation for the AR statement
- Clearly project information on the invoice
- a common platform to make communication easy

Observation & Experience

What do we want to see live? What will we ask the interviewee to show or demonstrate?

Sticky stock

- KPI for invoice issuing
- A platform receive customer questions and business answers

Stories & Experiences

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What solutions have you tried

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Sticky stack

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What do we want to **learn**?

What would be useful to see or experience **first-hand**?

lack of the accurate information between groups

how the business and customer communicating and expectation

visible KPI/manual for the invoice delivery

DEFINE: AFFINITY MAP INSTRUCTION

How to create an Affinity Map

1. Each team member reads one sticky note out loud.
2. The team discusses what the note is really about.
3. Place the note next to other notes that feel related.
4. Continue with the next notes and look for natural connections.
5. Create clusters of notes that describe similar problems, needs or situations.
6. When the clusters are visible, give each group a clear name.

Remember:

- Do not create categories too early.
- Let the material speak first.
- Use an "Other" area for notes that do not fit anywhere yet.
- Split groups that become too large.
- Create subgroups if one theme contains different angles.
- Name clusters at the end, not at the beginning.

Category & Conclusion

ANALYSIS AND INTERPRETATION

From clusters to meaning

Affinity mapping is not only about grouping sticky notes. The most important part is interpretation.

For each cluster, ask:

- What do these notes have in common?
- What problem or tension do they reveal?
- What does the user need in this situation?
- What surprised us?
- What is repeated across different interviews?
- How does this connect to our original challenge?

Under each cluster, write:

- the main conclusion
- the user need
- the insight or discovery
- possible implications for the challenge

1 Lack of reliable tool -
Insight: People waste time.

- The information exists, but not in one trusted place.
- I need reliable status, not another report.
- Reminders sometimes arrive before the customer understands the invoice.
- I check email, SAP and Excel before I know the invoice status.

2 Lack of transparency -
Insight: Users don't know where the invoice is in the process. Users needs clear status

- I do not know if the invoice was created, approved or sent.
- I need a clear next step, not an explanation of internal process.
- Invoice descriptions are sometimes too generic for customers.
- The invoice should show project name, PO and contact person.
- Overdue amounts are confusing when one customer has many projects.

3 Lack of effective comunications -
Insight: Need simple actionable information

- I find out about delays only when the customer complains.
- I feel uncomfortable chasing payment without clear invoice status.
- The portal does not explain why an invoice is missing.
- Email is fine if it includes project, amount, due date and action.

4 Problems with collaboration -
Insight: Responsibility is unclear, causing unnecessary collaboration and delays.

- The invoice line is often hard to connect with the project.
- Last week I spent an hour checking why an invoice was missing.
- Customers need a simple answer: what, when and why to pay.
- One invoice issue usually requires asking several people.
- There should be one clear owner for invoice clarification.
- When information is stuck, escalation is the only option.

5 Lack of standard procedure -
Insight: Define the process. It should be clear what the next steps are.

- Corrections, missing PO or unclear project names make the process messy.
- I often copy finance because I do not know who owns the issue.
- I spend time translating finance language for customers.
- A visible KPI would show delays before complaints appear.

6 Lack of internal control -
Insight: Teams want early warning instead of reacting after the fact

- I need to know before the customer becomes overdue.
- Success means seeing invoice sent, amount due, due date and delay reason.
- Weekly risk overview would be better than many separate emails.
- Simple customer questions often become internal investigations.

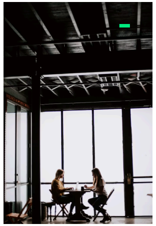
7 System/ technical problems -
Insight: Process delays are caused by operational timing

- My own tracker gets outdated quickly.
- The biggest barrier is access to the right systems.
- A platform helps only if everyone sees the same current status.
- I check several tools, but none gives the full picture.
- This happens almost every month, especially near closing.

TASK – HOMEWORK FOR EVERYONE

Conduct one simple and short interview.

1. Contact a person from the selected group.
2. Explain that you are participating in a training and need real information for workshop work.
3. You can talk live, meet on Teams, or send the questions by e-mail or chat.
4. Use the questions prepared during the exercise.
5. If possible, ask follow-up questions and capture examples, stories and quotes.
6. Write your answers in Miro using sticky notes. Please use one sticky note for one piece of information. (Tip: You can use Miro's bulk mode to paste table rows and automatically turn them into separate sticky notes.)



use the general mailbox to received invoice copy reather than personal address

regular do reconciliations to check the AR Open items

CUSTOMER JOURNEY MAP: TASK

Map the current journey connected to your challenge

Work in your team and create a Customer Journey Map for the process your challenge is about.

Steps:

1. Start with the stages of the process.
2. Review the proposed stage names on the board.
3. If you do not agree with them, change the names so they better reflect the real process.
4. Add touchpoints for each stage.
5. Add user actions — what the user is doing.
6. Add pain points — what is difficult, unclear or frustrating.
7. Add insights — what patterns, needs or improvement opportunities you see.
8. Mark the most important moments that should be improved first.

The goal is not to create a perfect map.
The goal is to understand where the experience breaks and where improvement can create the most value.

HOW TO READ THE JOURNEY MAP

Stages
The main steps of the process, for example: Discovery, Request, Approval, Onboarding, Service Usage. They show the journey from the beginning to the end.

Touchpoints
Where and how the user interacts with the service, system, team or communication channel. Examples: email, service portal, meeting, form, internal communication.

Actions
What the user is doing at each stage.
Examples: searching for information, submitting a request, waiting for approval, using the service.

Pain Points
Friction, frustration, confusion, delays or blockers in the user's experience. This is where the process becomes difficult or unclear.

Insights
Patterns, conclusions and improvement opportunities. This row helps us translate observations into decisions about what should be improved.

	1. Service completed	2. Biling Request	3. Invoice Creation	4. Invoice delivery	5. payment management	6. dispute management
Touchpoints Where and how the customer encounters you at this stage	Business colleagues	Biling request	Local finance SAP systerm	public Email	Reconciliation and reminder	overdue invoice clarification for the invoice, detail projects AR team business
Actions What the customer is actively doing	waiting email confirm confirm that the service is completed	business submits request customer is waiting for the submition check the status with business	local finance is creating the invoice customer is waiting for followups	customer received inovices Receive and validate invoice details	check the payment customer pays the invoice	questions submit payment plan
Pain Points Friction, frustration, and blockers in the customer's way	Hard to find when the invoice come	Unclear SLA no visibility	couldn't know invoice billing status	didn't receive the invoice don't know which project related	cannot payment since information need confirm	don't know who is the owner of the issue
Insights Patterns, conclusions, and opportunities to act on	Publish a tracker visibility into service completion status	check the billing list	Pre communication before invoice creation	standardlized invoice format standardlized invoice delivery	Auto reminder with clear actions	clear explanations of overdue items and an easy path to resolution clear ownership of the issues

RULES FOR IDEATION

1. **We stay committed to our challenge from the previous session**
   Keep your focus on the goal we defined earlier and actively search for answers to the "How might we" challenge from the previous session. Build on yesterday's work, stay engaged, and continue moving forward together.
2. **There are no bad ideas — only brave hypotheses**
   The crazier, more unusual or "impossible" the idea feels, the better. Breakthroughs often start outside the comfort zone.
3. **First generate, then analyse**
   Do not judge, comment on or analyse ideas while we are creating them. Evaluation will come later.
4. **Be specific, not generic**
   If an idea sounds too broad, make it concrete. A good idea should explain what, for whom and how.
5. **Constraints are a starting point, not the end**
   Treat limitations as fuel for creativity. The question is: how might we overcome this barrier?
6. **Look for inspiration everywhere**
   Use examples from other industries, technologies, services, startups and unexpected contexts. Innovation often comes from combining distant worlds.
7. **Speed matters**
   We will work in short rounds and time boxes. Time pressure helps us avoid overthinking and generate more boldly.
8. **Support others and yourself — leave your inner critic outside**
   Encourage each other, build on ideas, and create a safe space for experimentation. Your inner critic can wait outside the door — we will invite it back later, during evaluation.

10X THINKING

Most organizations try to make their products, services or processes **10% better**.

They optimize what already exists.
They improve the current process.
They fix small pain points.

But 10% thinking often keeps us inside the same assumptions.

10x thinking means asking a different question:

Not: "How can we improve this a little?"

But: "How could we make this 10 times better, faster, simpler or more valuable for the user?"

10x ideas may feel unrealistic at first — and that is the point.

They force us to:

- change perspective,
- question current assumptions,
- look beyond existing processes,
- imagine a radically better experience,
- search for new ways to create value.

In this exercise, we will use 10x thinking to push our ideas beyond obvious improvements.

SILENT IDEA GENERATION

Your task: generate as many ideas as possible individually and in silence.

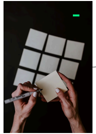
You have **10 minutes.**

Work with your team's **"How might we..." challenge** and follow the ideation rules.

Instructions:

1. **Read your "How might we..." challenge carefully**
   Make sure you understand what problem you are generating ideas for.
2. **Switch off your inner critic**
   Write down every idea that comes to your mind — including ideas that feel strange, unrealistic, too simple or even "stupid".
   At this stage, quantity matters.
3. **Make your ideas specific**
   Do not write only the desired effect.
   For example, "better communication" is not an idea.
   Describe what could actually be done, for whom and how.

After 10 minutes, I will give you additional inspiration to help you push your ideas further.



GROUP BRAINSTORMING

Your task: share your ideas and build on them as a team.

You have **15 minutes.**

This is not a presentation.
This is not a decision-making moment.
This is not a search for approval.

Instructions:

1. **Read your ideas to the group**
   Briefly explain what you wrote, but do not try to defend or "sell" your ideas.
2. **Listen to others with curiosity**
   Do not judge, evaluate or discuss whether the idea is realistic yet.
3. **Build on each other's ideas**
   Use other people's ideas as triggers for new directions.
4. **Generate 10x ideas**
   Ask yourself: What would this idea look like if it was 10 times better, faster, simpler or more valuable for the user, and how could it improve key KPIs by 10x?
5. **Add new ideas to the board**
   Keep writing. Every new idea should become a separate sticky note.

Goal: create more, stronger and bolder ideas than any one person could generate alone.

Copy and paste here your HMW questions

How make invoice information easier to understand without finance knowledge (invoice format)?

reco:

How might we make the invoicing process fast and self-explanatory, so customers instantly know what is happening, what to do next and who to contact if needed?

100x reco:

How might we make it impossible for customers to feel lost during the invoicing process?

Design a one-page visual guide with simplified graphics

Assign fixed AR specialist to each customer group, fully responsible for all timeline-related inquiries: invoicing schedule, payment term adjustment, overdue payment consultation.

Users will be granted access to log in to the billing website. They can enter the project number to check the current invoicing status and download invoices independently.

When sending invoices via email, embed the link for checking invoice details within the email body. Also include contact information in the message, so customers can reach the designated contact directly if they have any inquiries.

End-to-End Invoice Journey Portal

Smart Communication and Notifications

develop RPA to auto issue billing .

SharePoint page

Design a one-page visual guide with simplified graphics for customers.

SHORT TERM SOLUTION:

Share Point Page with access to all

LONG TERM SOLUTION:

- AI lead website with an access to the systems to collect the data from SAP
...

LONG TERM SOLUTION:

- AI lead website with an access to the systems to collect the data from SAP, with access for AR Team - in some situation when they need human-help.

Invoice Confidence Score

Sticky stack

Chatbot assistent for users - answewring the questions. So the user can ask for example what is the status of the invoice?

putting emojis to sticky note with an idea is idea analysis :)

AI leading Dashboard

A step - list - tool
A tool that is leading you step by step through the process. When the step is done you see it on the list.

Sending an Invoice status when there is a need of action.
(In step 5. sending an invoice and payment reminder)

TASK: ANALYSE IDEAS ON THE MATRIX

Use the idea evaluation matrix on the Miro board.

Place each idea on the matrix according to two criteria:

Vertical axis:
Impact on solving the problem and improving KPIs

Horizontal axis:
Impact on user experience

Instructions:

1. Read all ideas generated by your team.
2. Discuss what each idea could change for the user and for the organization.
3. Place each idea on the matrix.
4. Look for ideas with the strongest combined potential:
   - high impact on the problem and KPIs,
   - high impact on user experience.
5. Select **2 ideas** that your team wants to develop further.

Output:
2 selected ideas with the highest potential for prototyping and testing.

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Problem — what is visible today?
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Business consequences — why does it matter?
When customers and internal colleagues lack clarity, payments are delayed, clarification requests increase, and AR / Finance teams spend more time explaining invoice status instead of collecting payments.

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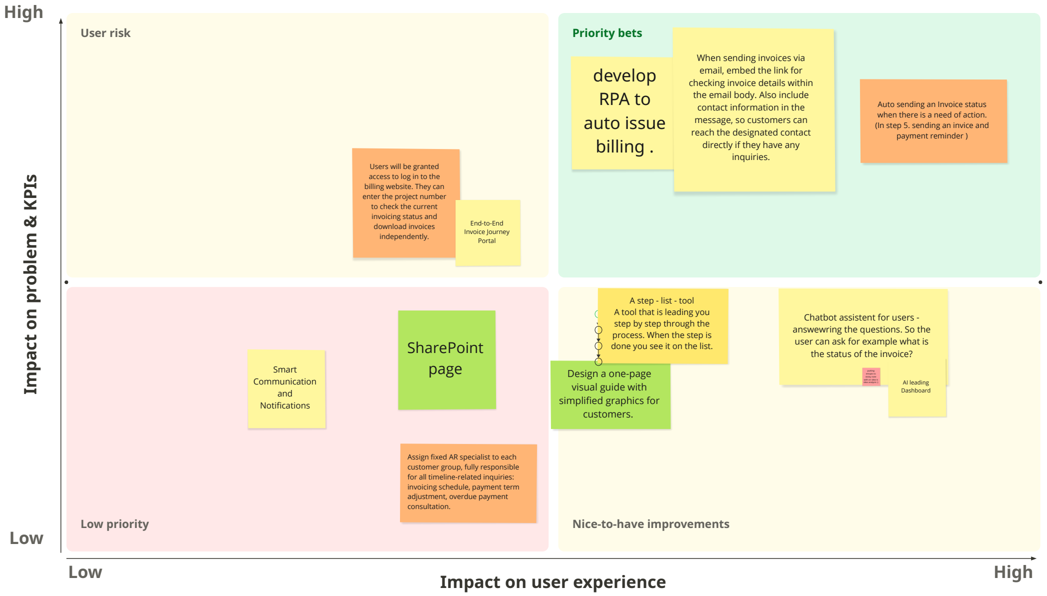

TEST YOUR PROTOTYPE

Test your prototype or MVP with a user from another team to check if your Test Card experiment gives useful evidence about your hypothesis.

What to do:

1. Set the context
- Who is the user?
- What problem does the prototype solve?
- What hypothesis and success criteria are you testing?

2. Give a task (don't explain too much)
- Ask the user to complete a realistic scenario
- Let them interact naturally with little guidance

3. Observe carefully
- What is clear vs confusing?
- Where do they hesitate?
- What questions or reactions appear?
- What do they do differently than expected?

4. Ask for feedback
- What worked / didn't work?
- What was unclear or missing?
- What would improve it?
- Did you meet your success criteria?

5. Draw conclusions
- What to keep, improve or change?
- What did you learn about your hypothesis?
- Continue, adjust or stop?

How old invoices can we see on the website?

Who can access the portal?

Who can give me an access to the portal?

Where can I download the invoice?

NEED MORE VISIBLE INFORMATION.

No doubt

Clear

Clear user friendly guidance

Invoice by project / filters it's a great advantage

Quick access to billings and documents in one place

Clear support info - no additional guidelines are necessary. It is intuitive

Can I get notification for unpaid INV before the deadline?

Design an experiment for your selected idea

Use the **Test Card** to turn your selected idea into a simple experiment.

Your goal is to decide **which key hypothesis should be tested first** and how you can verify it in the most reliable way during the next session.

Your conditions

- In the next session, you will have:
- 1 hour to build a simple prototype, MVP or test material
- At least 1 tester from another team to test it with

Be creative with the prototype

- Your prototype does not have to be built only in Miro.
- You can use any format that helps you test the hypothesis, for example:
- a clickable mock-up, a process sketch, a simple form, a storyboard, a landing page, a service script, an email/message draft, a dashboard mock-up, a role-play, or even a very simple MVP.
- The prototype only needs to be good enough to help someone react, understand, use or evaluate the idea.

When sending invoices via email, embed the link for checking invoice details within the email body. Also include contact information in the message, so customers can reach the designated contact directly if they have any inquiries.

A clickable mock-up

Test Card — Strategyzer

Test Name | Deadline
Assigned to | Duration

STEP 1: HYPOTHESIS

We believe that

If we grant the access to biling a website to users, we can reduce 50% email for information from customers. This will boost customer satisfaction and shorten the overall cycle time.

Critical:

STEP 2: TEST

To verify that, we will

Build a clickable mock up site
Invite users to evaluate

Test Cost: Data Reliability:

STEP 3: METRIC

And measure

Ask a specific group of users if it would be easier to check info on website or writing emails for info

and ask them whether they need to write an email with the question with additional information

STEP 4: CRITERIA

We are right if

The volumes of e-mails related to invoices information and contact reduce 50%，Customers are highly satisfied, and our cash collection cycle is shortened accordingly

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Step 2 should be defined more precisely. A clickable mock-up is not an MVP—it is only a mock-up. It can help test usability, content and clarity, but it will not verify the hypothesis that the solution reduces the number of emails by 50%. Users may say they would use it, but this does not prove that their actual behaviour will change.
To verify the hypothesis, the solution should be implemented in the simplest usable form.
For example:

- Select 10 customers.
- Create a dedicated SharePoint page or Word document for each customer.
- Keep the information updated and include a link in relevant emails.
- Track whether and how often customers access the file.

My recommendation for the workshop is to create a reusable SharePoint page or Word document template. This will also help you define the key information customers need. You can analyse previous customer emails to identify the most common questions and determine what content should be included.

In Step 3, compare:

- the number of status-related emails received from these 10 customers,
- the number received from 10 similar customers without access to the document,
- how often customers accessed the file,
- whether they found it helpful, based on a short interview or survey.

Success criterion: customers with access to the updated file send at least 50% fewer status-related emails than customers without access.

Design an experiment for your selected idea

Complete the Test Card

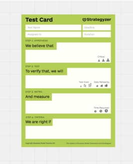
1. We believe that…
Write the most critical hypothesis behind your idea.

2. To verify that, we will…
Describe the smallest prototype, MVP or experiment you can prepare in 1 hour.

3. And measure…
Define what you will observe, ask or count during the test.

4. We are right if…
Define the minimum result that will tell you the idea is worth continuing.

What can we test quickly that will give us the strongest evidence for making a decision?

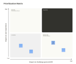


Sticky stock

Prioritisation Matrix: Instruction

How to work with the matrix

1. Review your needs, problems, insights and key conclusions.
2. Place each sticky note on the matrix:
   - higher = stronger impact on user experience
   - further right = stronger impact on the challenge goal and KPI
3. Discuss differences in the team.
4. Select the items in the top-right area as your priorities.



Prioritising Needs & Insights

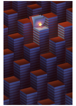
Choose what matters most

Now we prioritise the needs, problems, insights and conclusions that should guide our solution work.

Use the matrix to assess each item from two perspectives:

- **Impact on the user experience**
  How strongly does this need / problem / insight affect the user's experience?
- **Impact on the challenge goal and KPI**
  How strongly does it support the original challenge, business goal and KPI?

Key question:
Which needs or insights, if addressed, would create the biggest positive impact for users and the challenge goal?



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- Local finance teams

What is expected from the team?
Understand what customers and internal colleagues need to know at each stage of invoice delivery and overdue payment clarification.

Important KPI for the business
On-time invoice delivery rate — percentage of invoices delivered to customers within the agreed timeframe.

Baseline: 76% of invoices are delivered on time.

Target: 90% of invoices delivered on time — increase by **14 percentage points**, which means an **18% relative improvement**.

Working challenge
How might we improve the invoicing experience for external certification customers, business colleagues and local finance teams so that customers receive invoices on time, understand what they need to pay and know what to do next, while AR / Finance teams can reduce repeated clarification work?

High

Impact on user experience

Low

User value
check business relevance

standardlized invoice format

Publish a service status tracker

visibility into service completion status

Top priorities

clear ownership of the issues

standardlized invoice delivery

clear explanations of overdue items and an easy path to resolution

Low priority

check the billing list

Business value
check user relevance

Pre communication before invoice creation

Auto reminder with clear actions

Impact on challenge goal and KPI

High

HOW MIGH WE...

How might we create a tool that shows the customer and the AR the status of the invoice and what are the next steps ?

How can we create a platform that helps customer to ask questions and easier found correct person

tool, platform - are suggesting solutions, this is better version ->

How might we lead the customer through the process that he feels comfortable and knows well what is happening?

How to build good relationship with customers

How might we establish a clear ownership framework to enable efficient communication for all raised concerns

How improve on-time invoice delivery from 76% to 90%

How make invoice information easier to understand without finance knowledge (invoice format)?

How increase invoice transparency while improving business performance?

reco:

How might we make the invoicing process fast and self-explanatory, so customers instantly know what is happening, what to do next and who to contact if needed?

100x reco:

How might we make it impossible for customers to feel lost during the invoicing process?

Task: Create 3 "How Might We...?" Questions

Turn your top priorities into strong design questions

Based on the highest-priority needs, problems, insights or conclusions from your matrix, create **3 How Might We questions** that will guide your ideation.

A strong HMW question should:

- address one of your top priorities
- connect to the original challenge and KPI
- improve the user experience
- support the desired business or service outcome
- be open enough to generate many different ideas
- be ambitious enough to move beyond small improvements

At least one question should be a **difficult, ambitious or 10x question** — one that pushes the team toward breakthrough innovation, a new way of solving the problem and achieving the desired challenge outcome.

How to formulate a strong HMW question

Use this structure

How might we **[action]** for **[user / stakeholder]**, so that they can **[desired user outcome]**, while we support **[challenge goal / KPI / service outcome]**?

Elements:

- **Action:** help, reduce, increase, simplify, encourage, enable, make easier
- **User:** internal client, service user, business partner, team member
- **User outcome:** clarity, confidence, speed, less effort, better decision-making
- **Business / KPI outcome:** fewer escalations, shorter cycle time, better quality, fewer repeated questions, higher satisfaction

Example:
How might we simplify the request process for internal clients, so that they can submit complete requests faster, while the service team reduces rework and clarification loops?

Make it more ambitious: 10x HMW

Do not only ask how to improve. Ask how to rethink.

A standard question often leads to incremental ideas.

A difficult HMW question forces the team to go beyond obvious improvements.

Standard
How might we help new service users understand what to do in the first week, so that they can start using the service confidently and the support team receives fewer basic questions?

More ambitious
How might we make the first week of using the service feel almost self-explanatory, so that new users can complete key actions without needing basic support?

10x
How might we redesign the onboarding experience so that new service **users can achieve their first successful outcome in one day, with almost no effort and no need to contact support?**

E-MAIL TEMPLATE:

Dear Sir or Madam,

If you would like to check the status of your invoice, please use our invoice tracking tool:
https://tuv-rheinland-global-internal.com/customer-portal/signin
Should you have any questions, please do not hesitate to contact us.

Kind regards,
AR Team

invoice Status

Invoice Number: INV-123456

Status: Delivered to Customer

Invoice Date: 15/06/2026

Due Date: 15/07/2026

Amount: EUR 1,250.00

Next Step: Payment is pending.

Need Assistance?

If you have any questions regarding your invoice, please contact the AR Team.

ar@company.com
+XX XXX XXX XXX

Accounts Receivable (AR) Team

All invoices status

Billing by project

Review invoices, payment status and billing documents for each project.

Account details | Contact billing support

One invoice is due soon
Invoice INV-2026-0712 for project PRJ-24018 is due on 22 July 2026.
View invoice

Outstanding balance	Active billed projects	Paid in 2026
PLN 18,450.00	**3**	**PLN 74,980.00**
Across 1 open invoice	Visible in the invoice register	4 invoices paid

My invoices by project

Search invoices: Invoice number, service or project
Project number: All project numbers
Status: All statuses
Year: 2026
Clear filters

PRJ-24018 · Inspection programme | PRJ-23872 · Technical assessment | PRJ-23114 · Audit & training

PRJ-24018 Inspection & certification programme

Project total: PLN 30,750.00

Invoice	Service	Issue date	Due date	Amount	Status	Document
INV-2026-0712	Inspection and certification services	08 Jul 2026	22 Jul 2026	PLN 18,450.00	Due soon	↓ Download PDF
INV-2026-0330	Site inspection services	22 Mar 2026	05 Apr 2026	PLN 12,300.00	Paid	↓ Download PDF

PRJ-23872 Technical assessment

Project total: PLN 28,750.00

Invoice	Service	Issue date	Due date	Amount	Status	Document
INV-2026-0584	Technical assessment services	24 May 2026	07 Jun 2026	PLN 28,750.00	Paid	↓ Download PDF

PRJ-23114 Audit & training programme

Project total: PLN 34,750.00

Invoice	Service	Issue date	Due date	Amount	Status	Document
INV-2026-0411	Audit services	12 Apr 2026	26 Apr 2026	PLN 22,300.00	Paid	↓ Download PDF
INV-2026-0198	Training services	15 Feb 2026	01 Mar 2026	PLN 12,450.00	Paid	↓ Download PDF

Customer Portal | Billing & Documents

Overview | My invoices | My documents | Account details | Help

Customer Portal / Billing overview

Welcome, Example Customer

View your invoices, check payment status and download billing documents.

Account details | Contact billing support

One invoice is due soon

Invoice INV-2026-0712 is due on 22 July 2026.

View invoice

Outstanding balance
PLN 18,450.00
Across 1 open invoice

Next payment due
22 Jul 2026
PLN 18,450.00

Paid in 2026
PLN 74,980.00
4 invoices paid

My invoices

Search: Invoice number or service | Status: All statuses | Year: 2026

Invoice	Service	Issue date	Due date	Amount	Status	Document
INV-2026-0712	Inspection and certification services	08 Jul 2026	22 Jul 2026	PLN 18,450.00	Due soon	↓ Download PDF
INV-2026-0584	Technical assessment services	24 May 2026	07 Jun 2026	PLN 28,750.00	Paid	↓ Download PDF
INV-2026-0411	Audit services	12 Apr 2026	26 Apr 2026	PLN 22,300.00	Paid	↓ Download PDF
INV-2026-0198	Training services	15 Feb 2026	01 Mar 2026	PLN 12,450.00	Paid	↓ Download PDF

Quick actions

Download account statement
Billing activity for the selected period

Request an invoice correction
Report incorrect company or billing details

Submit payment confirmation
Attach proof of payment for review

Billing account

Customer number	C-104582
Company	Example Customer Sp. z o.o.
Default currency	PLN
Payment terms	14 days

Check Your Invoice Status

To check the status of your invoice, please enter the invoice number and invoice date.

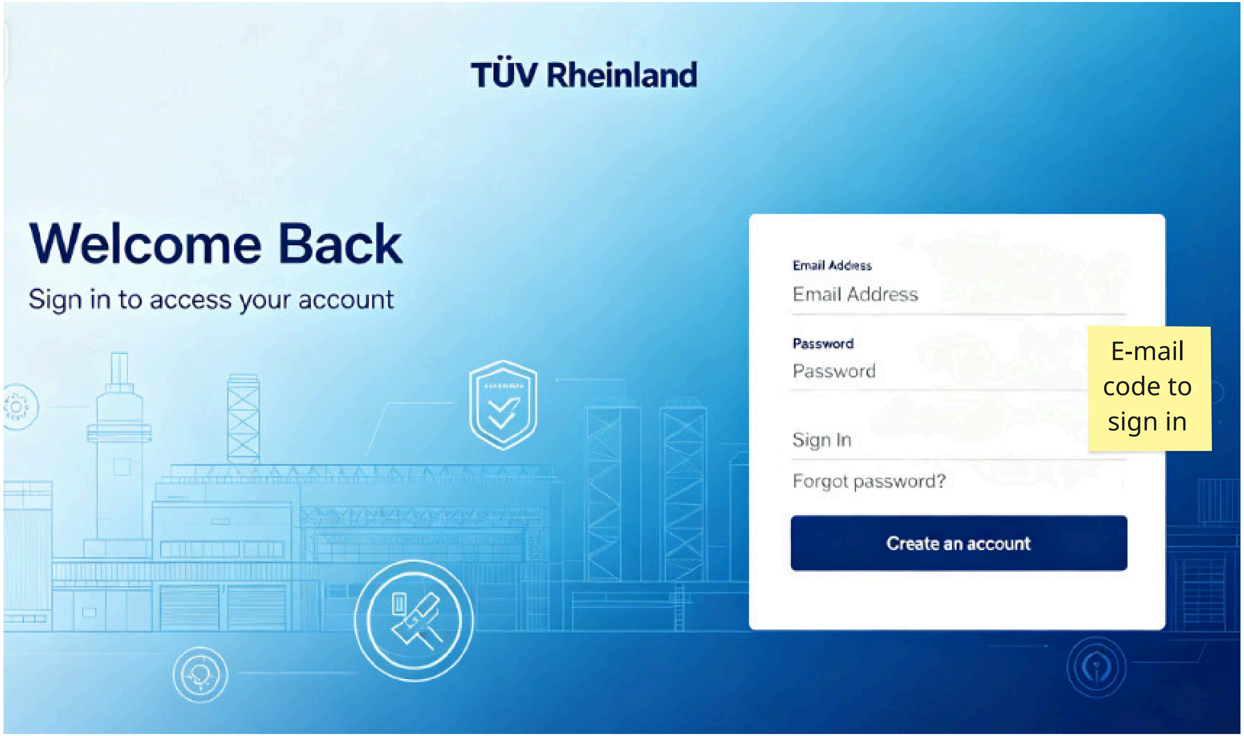
Invoice Number

[______________________________]

OR **Project Number**

[Project Number]

[CHECK STATUS]



E-mail code to sign in

TÜV | Billing Portal Analytics

Usage overview · Customers · Projects · Invoice activity · Reports

Customer usage statistics

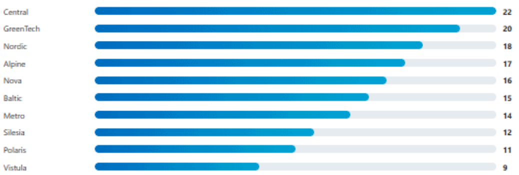
How 10 customers interacted with the billing portal.

Export report

Prototype with synthetic data: Every customer name, identifier and statistic on this page is fictional and created only to demonstrate the reporting experience. It is not TÜV operational data.

Customers analyzed	Total portal visits	Avg. time to check data	Invoice downloads	Successful checks
10	**154**	**2m 08s**	**97**	**65%**
Synthetic sample	All sample sessions	Visit weighted average	PDF actions	Average sample completion rate

Visits by customer



Customer journey activity

Email-link entries	66
Project-number filter uses	81
Invoice PDF downloads	97
Average visits per customer	15.4
Average time to check data	2m 08s

Customer detail

Search fictional customer

Sort by customer

Reset

Customer	Portal visits	Avg. time to check data	Invoice downloads	Project filters	Email-link entries	Successful data checks
Nordic Manufacturing Sp. z o.o. C-104501	18	2m 22s	11	9	7	72%
Baltic Energy Solutions C-104502	15	1m 58s	9	8	6	65%
Central Automotive Group C-104503	22	2m 45s	14	12	10	78%
Silesia Industrial Systems C-104504	12	1m 36s	8	6	5	58%
Vistula Food Technologies C-104505	9	1m 24s	6	5	4	51%
Alpine Components Polska C-104506	17	2m 11s	10	9	7	69%
Metro Infrastructure Ltd. C-104507	14	1m 49s	9	7	6	63%
GreenTech Process Engineering C-104508	20	2m 34s	13	11	9	75%
Polaris Medical Devices C-104509	11	1m 32s	7	6	5	56%

Customer Portal / Help us improve

How was your billing portal experience?

This short questionnaire asks about your recent experience checking invoices and project information. Your feedback will help improve the customer billing journey.

6 questions Responses are for prototype testing

1. How easy was it to find the invoice or project information you needed? *

- ○ 1 — Very difficult
- ○ 2 — Difficult
- ○ 3 — Neutral
- ○ 4 — Easy
- ○ 5 — Very easy

2. Were you able to complete what you came to do? *

- ○ Yes, completely
- ○ Partly
- ○ No

3. Which information or action did you use?

Select all that apply.

- ☐ Checked invoice status or due date
- ☐ Checked invoices by project number
- ☐ Downloaded an invoice PDF
- ☐ Checked or downloaded an account statement
- ☐ Requested billing support or an invoice correction

4. Did the portal save you from contacting the billing team? *

- ○ Yes — I found everything without contacting billing
- ○ Partly — I found some information but still needed help
- ○ No — I still needed to contact billing

5. Next time, would you use the billing portal instead of calling or emailing the billing team? *

- ○ Definitely not
- ○ Probably not
- ○ Not sure
- ○ Probably yes
- ○ Definitely yes

6. What would make the billing portal easier or more useful?

Optional comments (maximum 500 characters)

Prototype only: this form does not transmit or store responses. A production questionnaire should include the approved privacy notice, retention period and contact details.

Submit feedback

Prototype notice: This is a fictional customer questionnaire for usability testing. No response is sent to TÜV or any external system.

TÜV | Billing Portal Analytics DR

Usage comparison | Customers | Invoice activity | Reports

Billing page usage: 2025 vs 2026

Compare customer adoption and portal activity across the two years.

2025 2026

Synthetic prototype data: All customer names and usage figures are fictional. The 50% increase shown below is a designed scenario requested for the mock-up, not a claim about actual TÜV usage.

Customers using the billing page in 2025		Customers using the billing page in 2026
10	**+50%**	**15**
Baseline year	customer adoption	5 additional customers

Selected year	Customers	Portal visits	Avg. time to check data	Successful checks
2026	**15**	**176**	**1m 59s**	**72%**
Use year buttons to switch	+50% vs 2025	+72.5% vs 2025	32 seconds faster	+14 percentage points

Year-over-year usage indicators

Customers	Portal visits	Invoice downloads	Project filter uses	Email-link entries
10 → 15	**102 → 176**	**61 → 109**	**47 → 88**	**34 → 71**
+50.0%	+72.5%	+78.7%	+87.2%	+108.8%

Customer detail for 2026

Search synthetic customer

Customer	Portal visits	Avg. time to check data	Invoice downloads	Project filters
Nordic Manufacturing Synthetic customer	15	2m 10s	9	8
Baltic Energy Solutions Synthetic customer	12	1m 56s	7	6
Central Automotive Synthetic customer	18	2m 19s	11	9
Silesia Industrial Synthetic customer	10	1m 48s	6	5
Vistula Food Tech Synthetic customer	8	1m 41s	5	4
Alpine Components Synthetic customer	14	2m 04s	9	7


Self-Service Portal Impact Report
Volume Down, Satisfaction Up
• Total Email Volume Aging
2025:300 tickets
2026: 150 tickets
-50%
YoY
2026: 150 tickets
Manual inquaries reduced by half
• Customer Satisfaction Aging
2025:96 / 100
2026: 98.5 / 100
+2.5 pts
Customer experience improved
+2.5 pts
YoY
Customer experience improved
Conclusion:
Self-service portal reduces manual workload while improving satisfaction.
portal reduces workload while improving satisfaction.