



Business Process
& Technology
Optimization



BETTER ORDER-TO-CASH PROCESS MAKES MEDTECH COMPANY EASIER TO DO BUSINESS WITH

For many companies, order-to-cash challenges show up first in accounts receivable. Invoices go unpaid longer and customer disputes increase. The instinct is often to look for better tools to manage collections more efficiently.

In practice, those symptoms usually have deeper roots. Breakdowns earlier in the process—unclear ownership, inconsistent documentation, fragmented communication—create issues that no system can fully resolve on its own.

HARD TO DO BUSINESS WITH



A global medical device company began to see those patterns emerge. Despite steady demand, it was becoming harder to close out invoices and collect payments in a consistent, timely way. Customers were frustrated by billing discrepancies and unclear points of contact. Internally, teams spent more time tracking down issues than resolving them. Some customers had accumulated enough unresolved invoices to exceed their credit limits, which prevented them from placing new orders.

Leadership recognized the broader implication. It was becoming difficult to do business with the company, and that risk extended beyond cash flow to customer relationships and future revenue.

They asked IPM to step back and assess the order-to-cash process from end to end.

At first, the issue seemed to sit in collections. A growing backlog of unpaid invoices pointed to problems in accounts receivable. But when the team mapped the full process from order intake through fulfillment, invoicing, and payment, they found many of the issues started much earlier.

UPSTREAM DECISIONS, DOWNSTREAM IMPACTS



For example, sales often moved forward with signed quotes rather than purchase orders. That created problems later, when invoices could not be reconciled or approved for payment. Pricing discrepancies required manual coordination across multiple teams. Customer and product data contained inconsistencies that surfaced downstream as billing issues.

When problems arose, there was no clear path to resolve them. Customers didn't know who to contact, and internal teams didn't know who should respond.

The result was a cycle that was hard to break. Issues took longer to resolve, invoices remained open, and both customers and internal teams absorbed the extra effort.

At the same time, the company was preparing to implement a new collections management system to improve collections and reporting. But without consistent processes and reliable data, the system couldn't actually help.



A BUSINESS PROCESS RESET



IPM helped the organization reset its approach. They worked with stakeholders across teams including sales, customer support, finance, accounts receivable, operations, and data management to map current processes and identify where breakdowns occurred.

From there, they clarified how work should flow going forward. They defined roles and responsibilities so ownership was clear at each step. They established consistent communication paths, including who engages customers for different types of billing issues and when. And they tightened process requirements, such as ensuring appropriate

documentation is in place before orders move forward and invoices are issued.

At the same time, they introduced a more structured way to understand and manage problems. The team began categorizing disputes and tracking unpaid invoices to see both volume and root causes. They created standard communication templates to make customer outreach clearer and more consistent. Setting a regular cadence for cross-functional reviews helped teams resolve larger issues and identify patterns earlier.

BUILDING ON A SOLID FOUNDATION



By the end of the engagement, the company had taken a meaningful step toward a more disciplined way of working. The team updated or created 17 business processes, with additional improvements under way. Cross-functional groups began to take ownership of the process, supported by regular reviews and shared metrics. Teams now track and resolve disputes actively, with clearer visibility into root causes.

Just as importantly, the organization is better positioned to benefit from its technology investment. Instead of using a system to manage

symptoms, it can now use it to reinforce a consistent and transparent approach. By continuing to collect and classify the data, they can focus on the right issues to resolve for the biggest impact.

What began as a collections challenge led to a broader shift in how the business manages order-to-cash. By aligning process, ownership, and data first, the company made it easier for customers to do business with them and for teams to consistently support that experience.

