



Payout

PROCESS DECK

MY ROLE

Product Owner, Product Designer

TEAM

1 PM, 1 Designer, 4 Engineers

DURATION

November 2022 - June 2023, 8 months

PROBLEM STATEMENT

The intercompany team gets sent invoices every month via email.

Requests come to a group mailbox, or to many individuals.

It is hard to track ownership and there are often duplicates or missed invoices, which leads to reversals, reposting, and out of balances between entities.

STAKEHOLDER REQUIREMENTS

Intercompany means occurring/existing between two or more companies.

Intercompany transactions are financial transactions that take place between related companies, such as a parent company and a subsidiary, or between two subsidiaries.

Intercompany transactions are recorded separately from external transactions to avoid being recorded twice.

1. A web based application that will streamline the intercompany process
2. An application to submit intercompany invoices to the RTX intercompany team to process and post journal entries
3. An application that provides reports on invoice request data for analysis
4. An application that will provide real-time prioritization on intercompany invoices

TARGET AUDIENCE



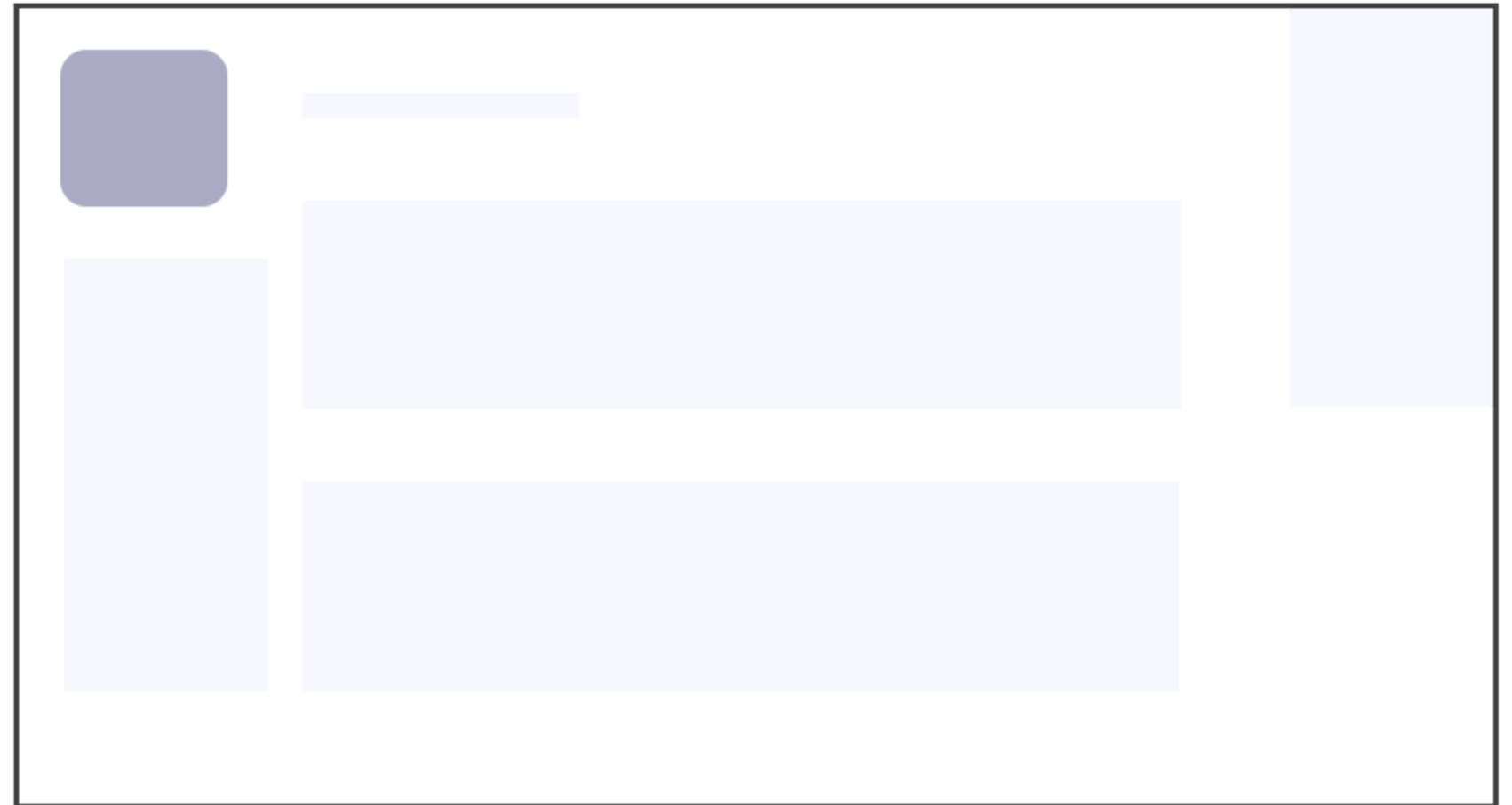
PRIMARY: RTX Intercompany Team
(Sr. Managers, Analysts)

SECONDARY: Other internal RTX Financial
Analysts (from other business units) that
need their invoices to be paid and processed

PERSONAS

Personas are made to understand the point of view of the users. They represent the needs of a large group of users.

I have considered 2 personas (Nancy and Austin) as the primary user, and Darren as a secondary user.



PERSONAS →



"I need a streamlined invoicing process to ensure timely financial reporting and clear accountability across my team"



ROLE

Sr. Manager



BU

Collins Aerospace

NANCY

ABOUT

Nancy oversees the intercompany accounting processes for Collins Aerospace. She has a broad experience managing accounting teams and implementing improvements to streamline processes. She reports directly to the Director of FP&A and plays a key role in ensuring that monthly financial reconciliations are accurate and completed on time.

GOALS

- 1. Improve Tracking & Ownership:** Implement a clear system for tracking and assigning ownership of invoices to avoid confusion and ensure accountability
- 2. Ensure Timely Closures:** Streamline the invoicing process to make monthly accounting closings more efficient, ensuring timely and accurate reports for decision-making.

PAIN-POINTS

- 1. Lack of Transparency:** Difficulty in tracking the progress and ownership of invoices as they come in through a shared mailbox leading to confusion over who is responsible for each task.
- 2. Balance Issues:** Reconciliation discrepancies between entities make it challenging to close monthly books on time and accurately, affecting financial reporting and compliance.

APPLICATIONS

MS OUTLOOK



SAP PRISM



MS EXCEL





“I want to simplify the processing and tracking of invoices so I can reduce errors and focus on more strategic tasks.”

ROLE

Accounting Analyst

BU

Collins Aerospace

AUSTIN

ABOUT

Austin is responsible for processing intercompany invoices, reconciling balances between entities, and assisting in month-end closing. He is detail-oriented and committed to ensuring that all invoices are processed accurately and promptly. While Austin is relatively new to the intercompany accounting team, he is eager to learn and improve the efficiency of the invoicing process.

GOALS

- 1. **Minimize Rework:** Reduce the frequency of invoice errors (duplicate/missed) by improving the system and creating a more efficient review process.
- 2. **Increase Productivity:** Free up time from administrative tasks (like reversing invoices) to focus on higher-value activities, such as analysis and reporting.

PAIN-POINTS

- 1. **Time-Consuming Rework:** Having to reverse and repost invoices due to errors in invoice tracking takes time away from more strategic accounting tasks.
- 2. **Lack of Centralization:** No centralized system for invoice processing and communication results in searching through various emails to find relevant information, **increasing** the chance of human error.

APPLICATIONS

MS OUTLOOK



SAP PRISM



MS EXCEL





"I rely on timely and accurate intercompany data to ensure our financial reports reflect the true state of the business unit."



ROLE

Financial Analyst



BU

Pratt & Whitney

D A R R E N

ABOUT

Nancy oversees the intercompany accounting processes for Collins Aerospace. She has a broad experience managing accounting teams and implementing improvements to streamline processes. She reports directly to the Director of FP&A and plays a key role in ensuring that monthly financial reconciliations are accurate and completed on time.

GOALS

- 1. **Timely Invoice Updates:** Receive timely information on intercompany invoices, for accurate forecasting and reporting in line with the business units timelines.
- 2. **Improve Communication & Visibility:** Have a clear view of the invoice status to ensure that all relevant information is available for financial reporting and analysis.

PAIN-POINTS

- 1. **Delayed Information:** No insight on the status of invoices and processing, which delays the flow of necessary data for accurate financial forecasting and reporting.
- 2. **Reconciliation Issues:** Difficulty in obtaining accurate information regarding intercompany transactions, can create confusion when forecasting or preparing reports based on the business unit’s intercompany balances.

APPLICATIONS

MS OUTLOOK



SAP PRISM



MS EXCEL

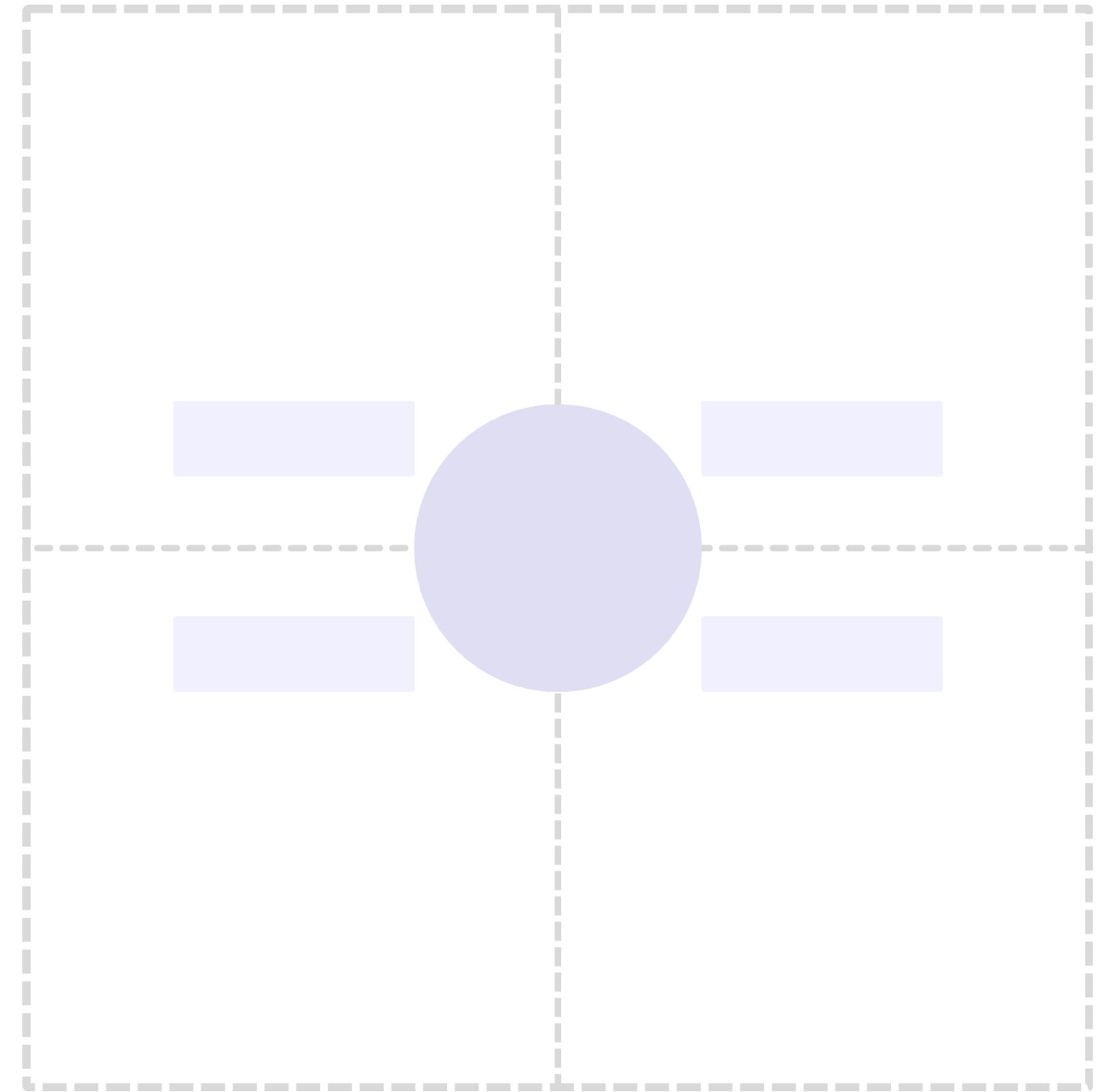


EMPATHY MAP

Empathy maps are made to gain deeper insights about the users, through understanding user behaviors or attitudes.

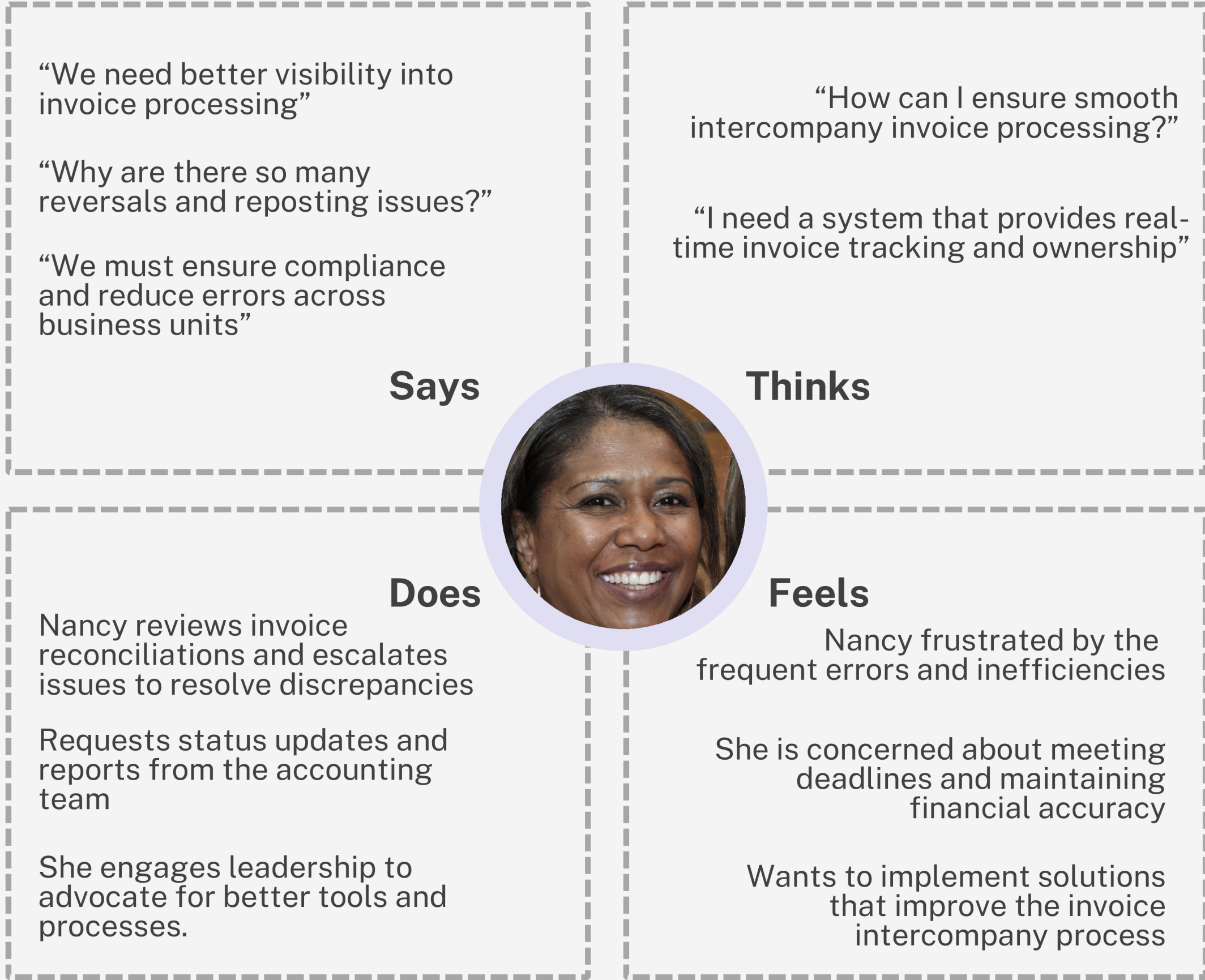
I have made 3 empathy maps with the understanding of pains and gains of the target users.

EMPATHY MAPS →



NANCY

Senior Manager at Collins Aerospace



Pain

1. Lack of visibility into the status of invoices and transactions
2. Difficulty in assigning invoice ownership and resolving disputes in a shared outlook inbox

Gain

1. Centralized application for invoice processing and tracking
2. Reducing errors and improve team accountability
3. Deliver more accurate and timely financial reports to leadership

DARREN

Financial Analyst at Pratt & Whitney

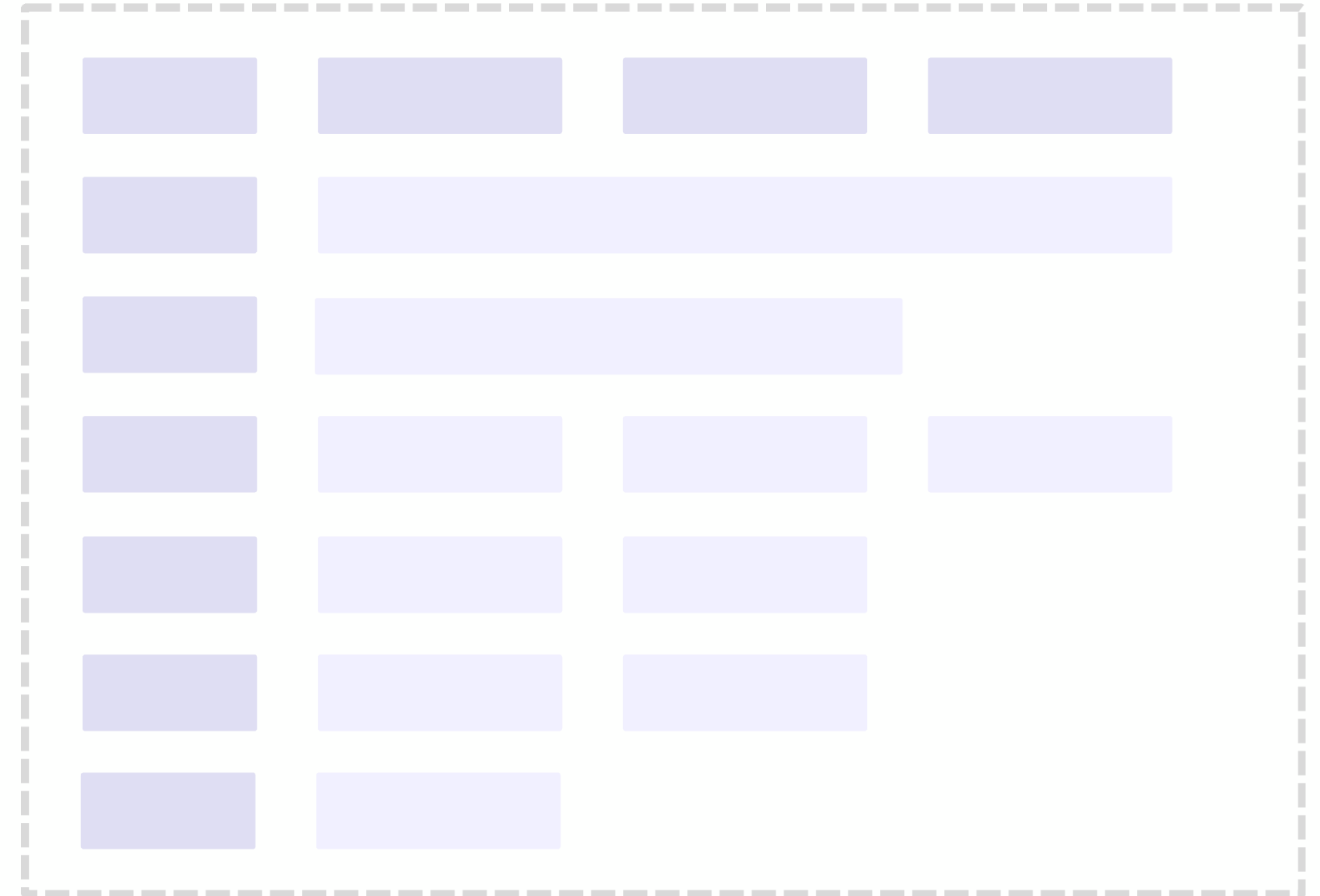


USER STORY MAP

An user story map is a visual representation of a customer's journey with a product, from start to finish.

It includes all the tasks a customer take to complete.

**VIEW THE USER
STORY MAP**





IC Invoicing Tool

User Story Map

User(s)

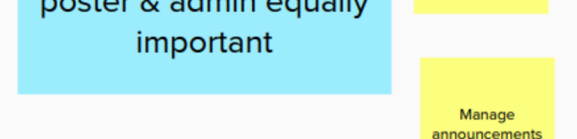
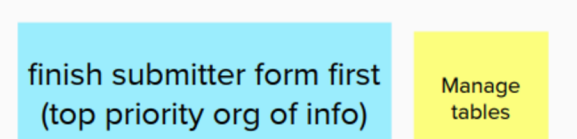
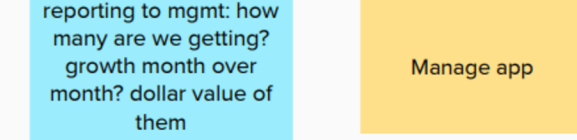
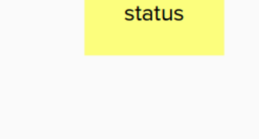
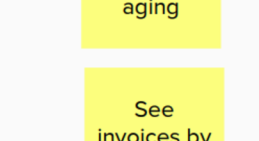
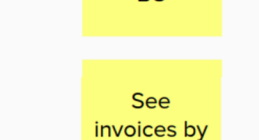
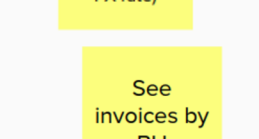
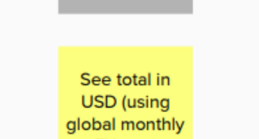
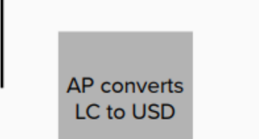
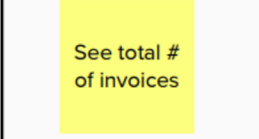
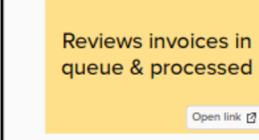
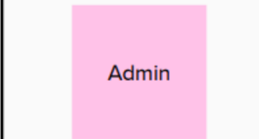
Activities

Steps

Invoice Submission Flow



Admin flow



Why is the product being developed?
What **outcome** should be achieved,
or which specific **benefit** should be offered.



IC teams get sent invoices every month via email - individuals take on invoices but lots copied, hard to know ownership

- 1.entries duplicated, causes reversals, reposting
- 2.invoices lost in emails cut down time on JEs and entries
- 3.analytical perspective: how many invoices, value
- 4.prioritize invoices

expand user story map
into [PDF format](#)

Design

Agile Principles and Scrum
using 2 week sprints

Then created the designs as follows


1. Low-fidelity wireframes with Balsamiq

2. High-fidelity wireframes with Figma


3. Final Design

Wireframes


+




Landing P...idual)




Manage Us...ess



Add User Access




View/Edit...Access



View All Submissions

Enterprise Services IC Accounting Workflow

<https://agilepoint-dev.utcapp.com/ApplicationBuilder/eFormRender.html?Process=Create Workflow>



Enterprise Services IC Accounting Workflow

Announcements

Application Owner(s)

User Full Name

firstname.lastname@rtx.com

Application Admin(s)

Tyler Brierly

tyler.brierly@rtx.com

Donny McKennett

donny.mckennett@rtx.com

Shannon Whitney

shannon.whitney@rtx.com

Actions

Submit a Request

Click to Submit a Request

My Open Tasks

Click to View Tasks

Application Views

View My Submissions

(READ-ONLY)

View All Submissions

Click to View All Submissions

Application Administration

Manage Users Access

Click to Manage Users Access

Manage Company Codes

Click to Manage Company Codes


Manage Trading Partners


Click to Manage Trading Partners

15

Enterprise Services IC Accounting Workflow Home

https://agilepoint-dev.utcapp.com/ApplicationBuilder/eFormRender.html?Process=Create Workflow





IC Acct Invoice Submission

Request ID ABC123

Requestor Details

Requestor ID #

Requestor Full Name

Requestor E-Mail Address*

Submission Date

Alternate E-Mail Address

email@server.com

Document Reference Number

#####

Only Appears for Internal ES Team

ACTION REQUIRED - Invoice Workflow Submission Request ID#

From: EASBPMSystem.QA.noreply@rtx.com, EASBPMSystem.QA.noreply@rtx.com

Sent: Friday, April 08, 2022 1:48 PM

To: Requestor Full Name, firstname.lastname@rtx.com

Subject: ACTION REQUIRED - Invoice Workflow Submission Request ID#

Importance: High



Dear Requestor Full Name,

Request #	Request ID #
Requestor Name	Requestor Full Name
Business Unit	Business Unit Name
Date	MM/DD/YYYY HH:MM

Your Process Invoice Workflow Request ID#, requires more information in order to process the request.

Please click [here](#) to open your task.

Please click [here](#) to navigate to the Enterprise Services IC Accounting Home Page


This is an automatically generated email. Please do not reply to this message.

ASSIGN

Able to assign ownership and tasks for invoice processing

← → ↻ 🏠 https://website.com/landing-page

TECHNICAL DATA / INFORMATION STRICTLY PROHIBITED; U.S. AND NON-U.S. PERSONS.

 **IC Invoicing Tool**

My Invoice Request

IC Invoicing - My Tasks (#) IC Invoicing - Team Tasks (#)

▼ Filter ↑ Sort ↻ Refresh

REQUEST ID	BILLING ENTITY	RECEIVING ENTITY	INVOICE DATE	INVOICE AMOUNT (IN USD)	POC	STATUS	SUBN
IC_REQ_1	1000	6001	10/20/2023	\$15,910.61	Tyler Brierley	Submitted	Janie
IC_REQ_2		6001	9/30/2023	\$7,143.69	Tyler Brierley	Resubmitted	Janie
IC_REQ_3		6001	10/25/2023	\$17,408.32	Tyler Brierley	Submitted	Janie
IC_REQ_4		6001	10/25/2023	\$8,742.94	Tyler Brierley	Submitted	Janie

View

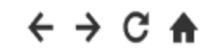
Take Assignment And Open

Take Assignment

Reassign Task

Release to Pool

Cancel Process



TECHNICAL DATA / INFORMATION STRICTLY PROHIBITED; U.S. AND NON-U.S. PERSONS.



IC Invoicing Tool



Announcements

Application Owners

Tyler Brierly
tyler.brierly@rtx.com

Jennifer Miller
jennifer.rahusen@rtx.com

Shannon Whitney
shannon.whitney@rtx.com

User: Last, First RTX

Submit Request



View My Tasks



View My Requests



View Team Requests



Reporting



Manage User Access



Manage Trading Partners



Manage Company Codes



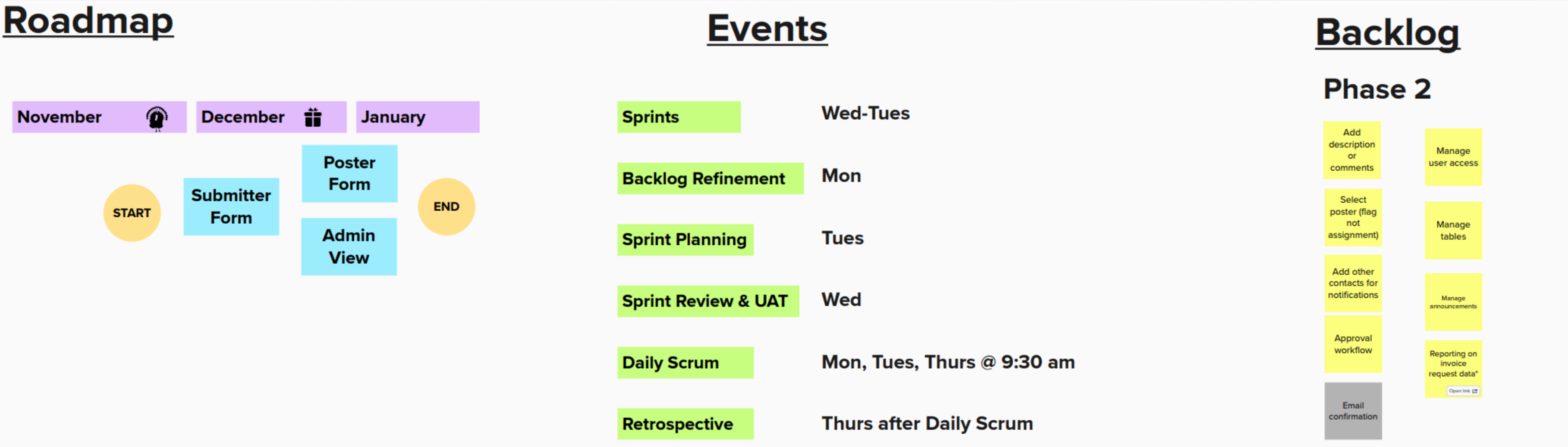
Manage Announcements



Contact the Help Desk | Have an Automation Idea?



Product Roadmap



Reflection

Leading and Owning

From this experience, undertaking a large enterprise-wide project was a new and enriching experience for me. Learning to advocate and empower the users I was building this product for. Usability testing in an application, that I proudly can say I *designed*. This not only challenged my managerial and interpersonal skills, but also allowed me to grow my leadership skills and take ownership of an application!