

A photograph of a smiling woman and a man looking at a laptop screen. The woman is in the foreground, and the man is slightly behind her. They appear to be in a professional setting.

AMERILIFE

customer story

Industry: Insurance

Company Size: Enterprise

Employees: 2,000

Headquarters: Clearwater, FL

Challenges:

- Manual P2P processes and affiliate expansion caused low spend visibility and unapproved purchases.
- Email-based requisitions led to invoice mismatches, coding errors, and unreliable data, hindering the FP&A team.
- Poor integration between spend tools and Oracle ERP obstructed strategic business growth.

Solutions:

- [Procure-to-Pay](#)
- [Source-to-Contract](#)
- [AP Automation](#)

Results:

- Despite adding 20+ affiliates each year, AmeriLife's requisition approval time is down to 1.41 days, thanks to a user-friendly and automated workflow.
- AI-driven automation enables the AP team to process invoices and FP&A to close books in under two days.
- A unified platform and self-service supplier portal enhance data analysis for smarter business decisions.

AmeriLife Plans for a Successful Future with Coupa and Acquis

Helping people live longer, healthier lives

Navigating the complex world of insurance and retirement planning can be challenging. AmeriLife is there to make it a little easier. With 50 insurance agencies and 300,000 agents and advisors, AmeriLife partners with the nation's leading insurance and finance providers to offer quality service to customers no matter where they live.

"We work with many affiliates. Our number one priority is to support them so they can support our customers. We don't want them bogged down on the administrative side of things," says Brent Reynolds, AmeriLife's Disbursement Director.

Brent joined the AmeriLife team two years ago. In that short time span, the company experienced rapid growth, nearly doubling in size.

"We were managing our procure-to-pay process through the ERP, but there was no approval system in place. We were getting everything by email or regular mail and then inputting it into the ERP. With our growth, we had loads of files and paper. It was just a nightmare to keep it going."

– Brent Reynolds, Disbursement Director, AmeriLife

AmeriLife needed to update its spend management system to support its growing business. However, finding a solution that could handle procurement for such a large, distributed organization seemed like a tough task. The new system needed to be easy to navigate for a diverse base of users. At the same time, it needed to be intelligent and flexible enough to automate and configure workflows as AmeriLife's business requirements changed. The company also needed a smooth implementation to avoid disrupting services for its customers.

Brent knew which solutions were up for the job. “I’d used Coupa at a previous company, and the level of visibility and control it gives you is unmatched,” says Brent. “We’d used Acquis as our implementation partner to get Coupa up and running there. The level of knowledge and personalized support they provided were also unmatched.”

With Coupa and Acquis, AmeriLife’s procurement and AP teams no longer spend countless hours tracking purchase orders or processing invoices. Automation and AI help streamline work so that teams can focus on more strategic projects, and one centralized database gives leadership the ability to make data-driven decisions. With better operational agility, AmeriLife better serves its customers so they can live longer, healthier lives.

Partnering with a trusted and tested implementation expert

Having chosen Coupa’s [Total Spend Management platform](#), it was time to create an implementation plan. Traditional spend management projects with a company of AmeriLife’s size tend to be lengthy, complicated, and resource-intensive – causing a ripple effect that impacts employees, customers, and the bottom line.

Brent had undergone a similar transformation at a previous company and worked with [Acquis](#), a certified Coupa implementation partner, to create a seamless implementation there. He was impressed with Acquis’ in-depth understanding of the Coupa platform, procurement expertise, and change management experience.

“The Acquis team does not cut corners. They truly take the time to understand your company’s unique business needs and then work to adapt Coupa to meet those needs,” explains Brent.

Building on the former project, Acquis worked with Brent and the AmeriLife team to focus on:

- **Streamlining procure-to-pay processes** to eliminate disparate systems and better support expense management, purchasing, invoice management, and payment workflows.
- **Improving compliance** through stronger visibility and control over spending across disparate departments and affiliates.
- **Fostering stronger supplier relationships** with an easy-to-use supplier portal to speed up PO, invoice, and payment processing.
- **Driving user adoption** with an effective and smooth change of management featuring a customized Coupa manual, pre-go-live classes, and feedback sessions.

The comprehensive plan enabled AmeriLife to implement and realize Coupa’s value fast.

“Having a good partner like Acquis made it easier. From our first implementation, we learned that getting buy-in is essential, so we worked together to create a robust change management plan,” says Brent. “We wanted end-users to know they were part of the solution, not a part of the problem.”

AmeriLife brought in end-users from affiliates and departments early to understand their pain points and formed teams to support the transition. There was even branding around the project, named “To spend management, and beyond,” featuring Buzz Lightyear.

In the end, creating excitement around the project, offering training resource materials for end-users, and continuously collaborating with users throughout the implementation paid off.

“Because everyone saw how Coupa would help them do their job, they were invested. We are now seeing some incredible KPIs for our business, and much of that has to do with how Acquis helped us set up the Coupa platform and how our users have adopted Coupa’s tools.”

– Brent Reynolds, Disbursement Director, AmeriLife

Growing the business without growing headcount

Prior to Coupa, gaining proper approvals and checking compliance was nearly impossible. With affiliates located nationwide and no system in place, AmeriLife’s AP team spent significant time tracking down purchase orders and matching them with invoices. There was little trust or visibility into the spending process.

Coupa enabled AmeriLife to streamline approvals and compliance with automated and digital workflows. There is now a hierarchy. When a purchase request comes through, it gets routed to the appropriate approver automatically. Each step is documented and traceable, so nothing slips through the cracks.

“Now everything, including payments, goes through this process,” explains Brent. “Every time an invoice comes in, it’s automatically uploaded to the system and distributed to the manager for approval. Based on your level, you have a certain dollar amount available. No payments are made without approval.”

AmeriLife processes 2x the amount of invoices without any additional headcount

Previously, it took weeks to approve an invoice and 10 days to close the books. Now, it takes less than two days to approve an invoice and just one day to close the books. AmeriLife is currently processing double the number of invoices without adding any additional headcount. Requisition approval times have also significantly improved, reducing to just 1.41 days.

This complete visibility and control help the AP and FP&A teams reduce miscoding and empower them to focus on more strategic initiatives. The changes help the procurement team drive more strategic supplier agreements, too.

“Coupa helps us see where the spending is going on a daily, monthly, and yearly basis. It opened our eyes to see what we needed to do to make things better, faster, and more productive,” says Brent. “It’s a huge efficiency multiplier.”

Putting data at the forefront of every decision

Most companies have loads of data, but it’s one thing to have it and another to analyze it. Prior to Coupa, AmeriLife lacked reliable, actionable, and granular data. Now, with all processes centralized in one system, Coupa enables the company to use and analyze its data to make the best decisions that drive long-term growth.

“Forecasting is much easier to manage and review,” says Brent. “Now you can pull a report, then slice and dice it any way you want. We didn’t have that before.”

All departments at AmeriLife can run their reports without any additional IT support. Teams can even schedule reports in advance for fast access without manual intervention. “Coupa just has so much reporting functionality that you can’t find with other solutions,” explains Brent.

With big-picture views and patterns on spending across affiliates and the organization as a whole, AmeriLife’s leadership can make decisions that better align with the company’s overall strategic goals.

“There’s data behind each and every transaction. Coupa links everything so you can see exactly what’s going on. There’s nothing hiding. From an audit standpoint, it’s perfect.”

– Brent Reynolds, Disbursement Director, AmeriLife

Building a future-ready infrastructure with automation and AI at the core

At AmeriLife, business needs are always changing due to a high volume of acquisitions and the joining of affiliates throughout the year. Coupa empowers the company to keep pace with quick integration capabilities and industry-leading automation and AI features. Onboarding these new firms previously took too much time and resulted in poorly integrated processes. AmeriLife now does 20+ of these integrations seamlessly with Coupa on a yearly basis. And when it’s time to reconfigure workflows to accommodate the affiliates, it can also be done without additional IT costs.

“What I love about Coupa is that you can manage the system yourself. If I want to make changes, there are admins that can do that. You can do it all in-house. You don’t need a third-party system or program to do anything.”

– Brent Reynolds, Disbursement Director, AmeriLife

Powerful AI-driven invoice processing is also driving productivity boosts for AmeriLife’s AP team. When invoices hit AP’s inbox, their data is automatically extracted and mapped to an electronic invoice record without additional work on the supplier’s end. Today, 70% of invoice processing is touchless. Purchasing cards are also integrated into AmeriLife’s banking system on Coupa, enabling the company to update its monthly statements automatically and understand spend at the most granular level.

70% of AmeriLife’s invoicing is touchless

While AmeriLife is focused on fine-tuning its current platform to maximize impact, the company is exploring new contract management technology and processes next. No matter what business needs arise, Coupa and Acquis provide the future-ready infrastructure necessary to support the growing insurance company.



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