

AI-POWERED ACCOUNTS PAYABLE AUTOMATION

## BDR Turns AP Automation into a Recurring Revenue Product.



BDR, a business coaching firm serving HVAC, plumbing and other trades companies, launched **Sidekick**, an AI-powered Accounts Payable product that turned a manual service into a scalable, recurring revenue offering—without adding skilled CPA accountants.

*“Sidekick let us productize accounting expertise instead of scaling headcount. It changed the economics of offering AP as a service”*

— Bruce Wiseman, CEO

### THE IMPACT

- ✓ **New AI-powered recurring revenue stream** from productized AP offering
- ✓ **Clear customer ROI** through meaningful time savings
- ✓ **Scalable delivery model** without added headcount
- ✓ **90% faster processing** - manual re-keying replaced by quick review & approval

**90%**  
faster  
processing

### THE CHALLENGE

BDR wanted to offer accounting services to small trades businesses, but manual AP workflows made scaling impossible.

- Accuracy of work and a QuickBooks integration were critical
- AP involved multiple manual steps and slow processing
- Human-driven invoice entry impeded margins and growth

Scaling with additional accounting staff would be cumbersome, time-consuming, and expensive.

### THE SOLUTION

In partnership, Contextual and BDR created **Sidekick**, a client-facing, AI-powered AP workflow system designed for speed and simplicity.

- AI-assisted PO creation synced with QuickBooks
- Photo capture and automated matching of packing slips
- Three-way matching invoice ingestion
- Human review and approval—no manual re-keying
- Clean push into QuickBooks with correct allocations

#### THE ONE BIG RESULT

**90% faster processing—turning AP into a recurring revenue product.**

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Contextual designs, builds, and operates purpose-built AI solutions, owned by you and powered by the Contextual platform.

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