

**Deloitte.**



**Streamlining Travel and Expense in the  
Cloud Leveraging Concur**

Smarter Decision-Making on the Go

# “Solutions from Concur, an SAP company, offer a path to a more streamlined and user-friendly travel and expense process.”

Travel budgets can be one of the largest indirect expenses for an organization to monitor and often represent one of the most highly disjointed processes to manage.

For the employee, aligning with travel policies, planning travel, and filing expense reports can be a manually intensive, time-consuming process.

For department leaders, the story is not particularly better. A fragmented travel and expense (T&E) process makes it difficult to

## It's all connected

Streamlining the travel and expense process can boost employee satisfaction while giving organizations a clearer information picture to support decision-making and other strategic needs.

see where and when money is being spent. It brings a new layer of challenges to audit activities. It makes it difficult to get a clear tax picture and can even leave opportunities for fraud. And in the current era of digital engagement, it does little to bolster employee productivity and satisfaction.

Solutions from Concur, an SAP company, offer a path to a more streamlined and user-friendly T&E process. With Concur® Travel & Expense, organizations can simplify and integrate their T&E activities through an intuitive cloud-based solution. Getting the most value from Concur Travel & Expense, however, requires a deep understanding of your current processes, a vision for the future, and a strategy to help you get there. We can help.

## A cloud-based journey

With Concur Travel & Expense, employees can have an efficient mobile, cloud-based T&E experience. Instead of stuffing a

growing collection of receipts into a laptop bag and then piecing them all together in an expense report, an employee can leverage Concur Travel & Expense to manage receipts and T&E transactions en route.

For starters, the Concur Travel & Expense application folds in automated expense documentation and functionality for third-party apps that an employee might use while on the go, like ground transportation. When it comes to printed receipts, the camera on an employee's mobile device is the starting

## The big idea

With SAP's Concur Travel & Expense and help from Deloitte, organizations can deploy a cloud-based solution for simplifying travel and expense, generating enterprisewide insights, and unlocking new value.

point. A photo of a receipt and optical character recognition enable Concur Travel & Expense to automate receipt data entry. The solution also gives the traveler the ability to create expense reports offline—on a mobile device while on a plane, for example—and then submit them for approval upon enabling wireless after landing.

Concur Travel and Expense also can make it easier for travelers to comply with company-specific policies while on the go. It can automatically flag receipts that are claimed multiple times on the same expense report and notify managers for unassigned company-paid expenses, helping auditors and approvers identify conflicts and even fraud before they strike. Ultimately, the cloud-based solution can help leaders develop a clearer information picture across travel and expense—one that can deliver insights for improved operational and strategic decision-making, from vendor considerations to global tax strategies.



“Our worldwide network of more than 16,000 business and technology professionals focused on SAP means we can help address your T&E challenges across the globe and across industries.”

### How we can help

Deloitte travel and expense management specialists understand that even something as routine as expense accounting is deeply connected to the many other moving parts in finance and HR organizations. They understand that CFOs and CHROs working at the strategic level are looking for ways to improve their processes and policy compliance without causing unwanted consequences elsewhere.

By deploying Concur with our Enterprise Value Delivery (EVD) for Cloud methodology, we can help you avoid unwanted consequences while adding major value to projects. EVD for Cloud stands as an established and time-tested process for accelerating transformations by completing tasks and deliverables based on the particular phase of the

implementation lifecycle. It's an integrated, multidisciplinary implementation approach for providing consistent delivery across system projects, helping to ensure that activities are linked to business results—not simply technical requirements.

Understanding processes is where Deloitte excels. Through our “business first” approach, we have helped organizations across industries, and we possess deep, specific experience on T&E issues. We bring unparalleled experiences like those to bear in our work with every client when putting travel and expense solutions to work. Strategy, technical implementation, training, and post-go-live support are only a few of the reasons clients come to us for help with:

- Business case development, analysis of current-state compliance levels, and future-state cost savings modeling

- Assessment of current business processes in light of future-state objectives and desired outcomes
- Policy refresh and development and compliance management procedures
- Travel and expense process standardization and automation
- Facilitation of tight integration of T&E processes and data into an existing solution ecosystem including HR, payroll, and accounts payable
- Integration of Concur Travel & Expense within an SAP environment or other backend ERP systems
- PCI compliance for credit card transaction processing
- Specialized payment management with banks

- Organizational change readiness assessment and change management, communications, and tailored training activities

We also bring critical SAP know-how to the table—an important factor, since Concur Travel & Expense is an integral part of the SAP family of solutions. Our worldwide network of more than 16,000 business and technology professionals focused on SAP means we can help address your T&E challenges across the globe and across industries. Not only do we provide critical guidance on business processes and technology, we also can serve as a single point of contact for your related SAP needs. Since Concur is a cloud-based solution, we also can assist with integration to any back-end ERP system by leveraging our technology practice experience with leading ERP solutions.

“Today’s technology can provide a much-needed boost to your efforts to improve capabilities.”

#### **Potential bottom-line benefits**

- Visibility and control of travel costs
- Facilitate corporate policy compliance
- Get a clearer view of T&E information to help improve tax and audit activities worldwide
- Increase process efficiency
- Boost employee productivity and satisfaction by reducing time spent on administrative tasks
- Accelerate deployment
- Automatically update regulatory rules
- Quickly deploy a preconfigured solution for use in more than 100 countries, using an international template
- Lower total cost of ownership, with no licensing required

#### **How to get more value with Concur Travel & Expense**

Our work with SAP and Concur Travel & Expense has uncovered insights that

are likely to be true regardless of the organization. Here are a few that may be helpful to you as you begin your T&E journey with Concur:

#### **Focus on process**

Today’s technology can provide a much-needed boost to your efforts to improve capabilities. But without the right processes in place, even the best technology can come up short. For example, travel on the cloud requires configuring and maintaining account assignments to enable the interface with your ERP system to properly assign the costs for travel. As a result, it is important to obtain a clear understanding on how the ancillary processes should be designed to achieve those goals.

#### **Build high-quality HR data and data hierarchies**

Making sure that all relevant master data is complete and accurate can be an enormously critical task. Any system is only as good as the data on which it relies. Undertaking a thorough analysis of the data before getting under way remains exceedingly important.

#### **Tightly integrate processes with an ERP system and vendors**

Moving travel functions to the cloud requires more than the cloud. To ensure that important information and important steps don’t fall through the cracks, a travel-on-the-cloud approach requires strong links to other information systems and partners. Integrating a new system with an ERP system or with the interface for a vendor (such as a bank or a credit card provider) will be key. And testing that integration multiple times before going live will help increase success.

#### **Get roles right**

For the system to work properly, each person in the system must have a clearly defined role—from the beginning. If an “approver” isn’t coded as such in the system, when the time comes to approve an expense report, it will be impossible to act. The same goes for roles such as auditors, travel administrators, controllers, travel assistants and others who must run reports on the system.

#### **Train early to avoid headaches later**

With any new system, managing change and conducting training are important. But the stakes are higher for systems that are responsible for paying employees money they are owed. Issues tend to escalate quickly when employees are expecting payment and are unable to receive it due to lack of training for each person’s role in the system.

# Let's talk

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