

# How to Secure Buy-in for Expense Reports That Write Themselves

Building a business case for automated expense management



# Table of Contents

---

<b>You Get It. But How Do You Help Others Get It Too?</b>	<b>03</b>
<b>Speak the Finance Leader's Language</b>	<b>10</b>
<b>Connecting Travel and Expense</b>	<b>13</b>
<b>Make IT Your Champion</b>	<b>15</b>
<b>Add Value for Accounts Payable</b>	<b>17</b>
<b>Partner with Sales</b>	<b>19</b>
<b>Sum It Up for the CEO</b>	<b>21</b>
<b>Next Steps</b>	<b>23</b>



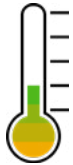
**You Get It.**  
**But How**  
**Do You Help**  
**Others Get**  
**It Too?**

# You Get It. But How Do You Help Others Get It Too?

**You love the idea of an expense report that writes itself.**

Expense reporting should be mobile and your data should be easily accessed through the cloud, but how do you get everyone else on board?

**As you build your case for smarter expense reporting, it is helpful to remember two things:**



Updating your expense reporting process isn't a top priority for most companies. That's because many business leaders don't realize how fixing expense reporting will positively affect many other aspects of their business.



Company leaders rely on feedback from other key roles in the business before deciding to invest in change. You'll need to ensure you work with various people in your organization to make that change happen.



## You Get It. But How Do You Help Others Get It Too? cont.

### What are the barriers to change?

Businesses are often resistant to change because they don't want to risk “good enough” for something that, in the end, could prove to be worse. But moving from ad-hoc, manual expense reporting to smarter, cloud-based – and even mobile – expense reporting provides value across the board.

### Top 5 barriers to improving company efficiency (% of respondents)

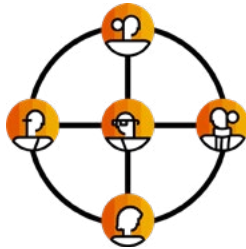


## You Get It. But How Do You Help Others Get It Too? cont.

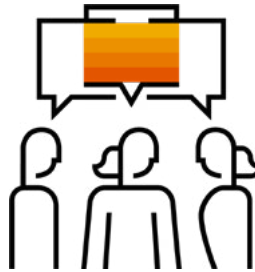
### Why does change take time?

With increased internal pressure to make the right decision, the average buying group is becoming larger and more diverse. Due diligence before purchase is becoming more independent and in-depth. The diversity of opinions and priorities among stakeholders is making consensus elusive. Ultimately, everyone has a say. As a result, many purchase processes stall entirely. That's why early engagement of key stakeholders is crucial to a successful project.

#### Top buying challenges:



**Decisions are made**  
by committee.



**An average of 5.4 people**  
are involved in every  
buying decision.



**It's hard for different functions,**  
business units, and stakeholders to  
agree on the problem and solution.

# You Get It. But How Do You Help Others Get It Too? cont.

## Who will be involved in this decision?

The purchasing committee will be wide and varied. Identification of key roles within your company will allow you to provide insight on how this change will benefit each key stakeholder.

The best way to get support for a new solution is by creating a groundswell from the bottom up. That's why it's important to engage the people who are feeling the most pain around expense reporting.

- **Employees, especially sales teams**, have to compile and submit them.
- **Managers** have to review and approve expenses.
- **AP personnel** need to process expense reports and reconcile budgets.
- **The travel administrator** needs visibility into costs.
- **The IT department** needs to manage and compute all the data.
- And your **C-level executives** need to get the big picture.

Otherwise, when your employees have to jump through hoops to take care of expense reports, they're:



- **Frustrated** by a meticulous and time-consuming activity
- **Distracted** from important work
- **Upset** when reimbursements are delayed



The earlier you involve these stakeholders, the more likely you are to eliminate potential roadblocks along the way.

## You Get It. But How Do You Help Others Get It Too? cont.

### See where interests align

To manage a successful project, as project lead, you might find yourself coordinating diverse groups of people with different needs, requirements, and goals. You need to help them understand the new technology and the unique benefits for their area of business.

Use the chart below to help decision makers with different goals see where their interests align.

	 <b>Streamlining processes</b>	 <b>Security and compliance</b>	 <b>Visibility into spend</b>	 <b>Cost control and savings</b>	 <b>Employee safety, satisfaction, and support</b>
<b>Finance leader</b>	X	X	X	X	X
<b>Travel</b>	X	X	X	X	X
<b>IT</b>	X	X			X
<b>Accounts payable</b>	X		X	X	
<b>Sales</b>	X	X	X		X
<b>CEO</b>	X	X	X	X	X



# You Get It. But How Do You Help Others Get It Too? cont.

## Engaging your stakeholders

Identify shared values to help your stakeholders focus on what unites them rather than what separates them. We'll take a closer look at each of the following:



**Finance leaders**



**Travel**



**IT**



**Accounts payable**



**Sales**



**CEO**





# Speak the Finance Leader's Language

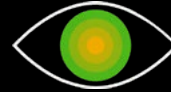
# Speak the **Finance Leader's Language**

If your CFO still needs convincing, here's how to answer some common concerns.

We know – the buck stops with your finance leader or CFO, so it's critical that you gain the support of this key stakeholder. Here's what your leaders care about:

- **Getting the big picture of expenses** and cash flow
- **Reducing costs** and risk
- **Controlling** discretionary spending
- **Increasing compliance** with spending guidelines

Smart expense reporting solves those issues by:



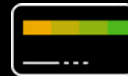
- **Providing visibility** into employee spending across the organization

- **Getting rid** of those paper receipts



- **Automatically populating corporate card** and travel purchases for an expense report that almost writes itself

- **Automatically reimbursing employees** and paying supported credit card providers



- **Matching travel-booking information with corporate card changes** and electronic receipts to create a secure system of checks and balances



- **Detecting and preventing fraud before it happens** by proactively enforcing corporate spending policies and flagging non-compliant transactions

## Speak the Finance Leader's Language cont.

“ “ **We don't have the budget.**

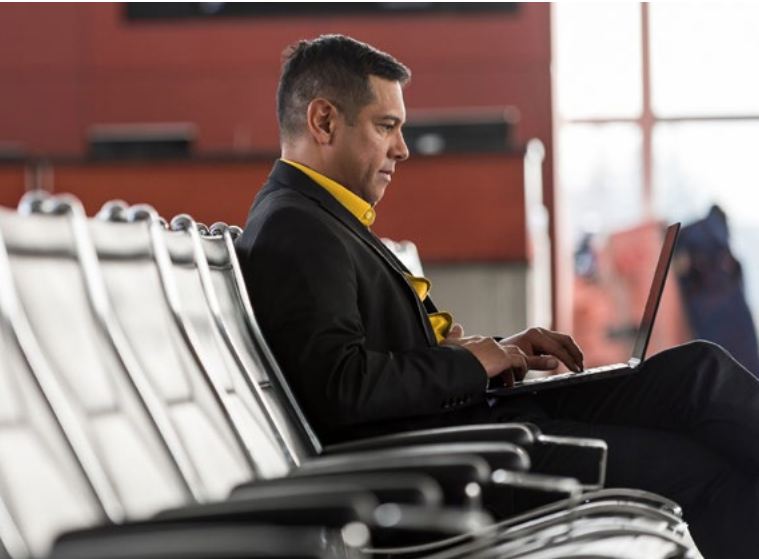
“ “ **How much will it cost?**

“ “ **How much does the average company save by automating?**

Automating the expense management process will actually save money by making our employees more productive and eliminating out-of-policy spending. With cloud-based software, getting started is easy and inexpensive, and ongoing costs are low. SAP Concur research has found that the average company saves \$8 per expense report. But, the real savings come in increased productivity and better cash flow management.

“ “ **Our current solution works. Why should we change?**

Consider the time it takes our front-line employees to find and organize receipts, enter the information into spreadsheets, print those and attach paper receipts, print, and then finally submit the report. Then add in the time for our back-office to check them for accuracy, plus the time for our managers to review and approve and reimburse employees. Now multiply that amount by the number of expense reports in a year. Would you still say our current process works? A cloud-based mobile app can help streamline that process – not to mention making our employees happier.



# Connecting Travel and Expense

# Connecting Travel and Expense

For many organizations, you can't talk about expense without talking about travel. After all, many expenses are made on the road. Bring your travel manager or administrator into the conversation early for transparency into total travel and expense (T&E) spending.

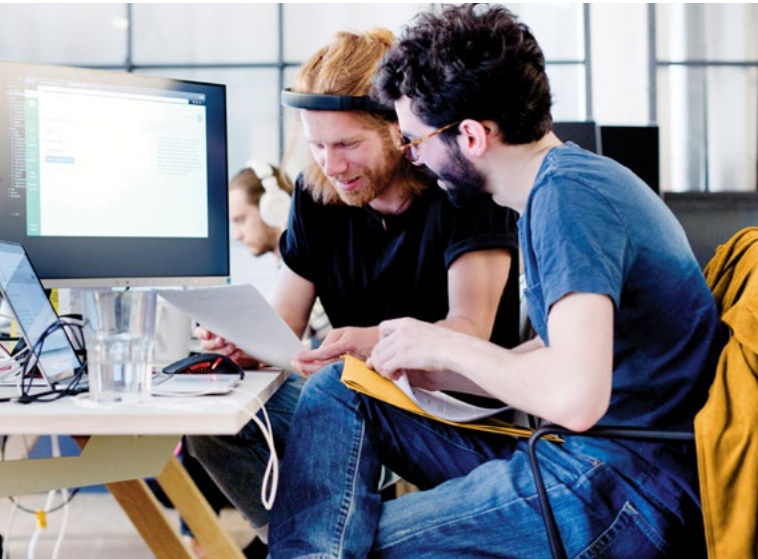
When travel and expense meet, travel administrators can:

- **Quickly analyze expenses**, reports, and trends from their desktop or mobile device
- **Centralize and align** T&E policies and procedures
- **Inspire spending compliance** by giving travelers flexibility with simple mobile tools and built-in policies
- **Review** up-to-the-minute e-receipts
- **Get visibility into spend** by traveler, project, meeting, region, or supplier



## Imagine an easier way to manage your spend

Hotel bills automatically itemized and added to your expense report as you check out. Card charges appear automatically as categorized line items on your expense report. Snap a picture instead of doing data entry on your mobile. An expense report that almost writes itself – just one of the many ways an automation tool like Concur Expense helps manage your company's spend so you can see the big picture.



# Make IT Your Champion

# Make IT Your Champion

Your IT department is critical to a smooth transition, and they have a lot on their plate, so answer the questions up front that they care about:



SAP Concur is connected with the systems you already have, so IT doesn't have to build new integrations.



Cloud-based technology is effortless. System upgrades, software updates, and seamless data integrations are included at no additional cost.



SAP Concur has end-user training, resources, and administration for reliable support.



Security and performance – no need for IT to worry. Secure hosting facilities, current compliance and security standards, and audits.

**Still, you may hear these objections:**

**“ We don't have the resources to switch to automation.**

With a cloud-based solution there is no software or hardware to buy, install, maintain, or upgrade. That means we can be up and running quickly. And because the solution is simple and intuitive, getting our staff trained and ready to use it is easy.

**“ It's not a good time to change our process.**

There is rarely a perfect time to make a change. Once you see how easy it is to deploy a cloud-based mobile app, you'll see we can't afford to wait to make this change and be thanked for proactively addressing this painful, frustrating, and costly process.





# Add Value for Accounts Payable

# Add Value for **Accounts Payable**

Your accounts payable team can be your strongest ally. They experience firsthand the frustration of a fragmented process, but when they understand how effortless, connected, and transparent the process can be when expense management is automated, they'll be on your side.

## They want to:



See the big picture of the organization's entire spend, not just parts of it



Reimburse employees quickly and easily



Ensure compliance across the organization



Get rid of manual paperwork and data entry

## Give them solutions by showing them how expense automation can:

- **Give them complete visibility** into all sources of spend, including purchase orders, e-invoices, P-card spending, supplier networks, and more
- **Allow spend analysis by department**, vendor, spending trend, and expense type
- **Automate their entire AP process** by leveraging digital, OCR technology data-entry points
- **Reduce their processing time**, manual entry, and paper trails
- **Proactively time payments** to maximize discounts and never again miss a due date





# Partner with Sales

## Partner with Sales

### “Automating our expense management is not a priority.”

Remember, expense reporting can affect all areas of your business. By automating, we can address improving efficiency, growing revenue, containing costs, and boosting employee morale all at once.

**Your sales leaders don't want expense reporting to distract from business at hand. What they do want:**

- **Free sales reps from busy work**, so they can focus on selling
- **Understand the connection** between travel and expenses and accounts
- **Ensure their sales reps are happy**

#### Salespeople benefit from smart expense reporting:



**It's effortless.** They can take a picture of their receipt right from their smartphone, toss the receipt, and get back to selling. Less time submitting expenses equals happy salespeople.

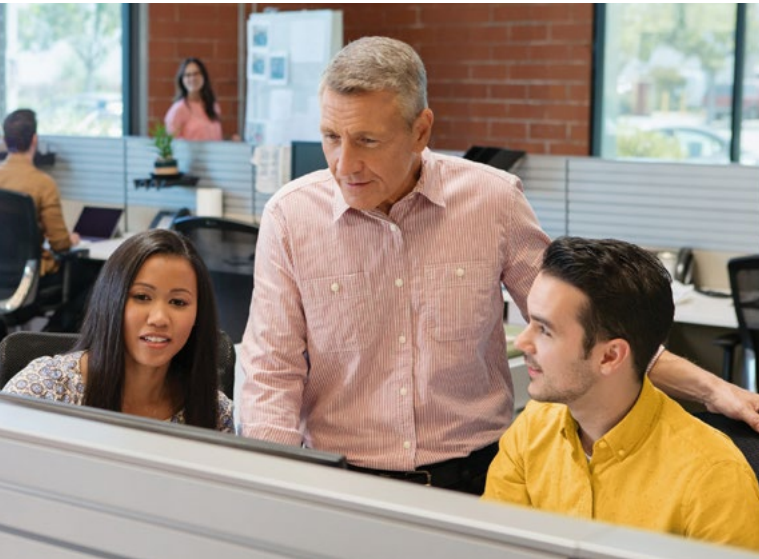


**It's connected.** They can access their travel itineraries at any time, and make changes on the fly. Plus the VP managers can review and approve them instantly.



**It's transparent.** Smart expense reporting empowers your leaders with the timely information needed to see the big picture.

Because cloud-based expense reporting integrates with popular tools like Salesforce, it even delivers visibility into the cost of acquiring a new client.



## Sum It Up for the CEO

# Sum It Up **for the CEO**

Your CEO/president cares about total value, ROI, and consensus from all of the leaders in his or her organization. Show how an expense report that almost writes itself translates to much more than just a better expense reporting process. Leaders will have a better view of the big picture.

The CEO may ask:

“**What will it look like a year after I've automated?**

**You'll see changes within weeks of moving from manual to cloud-based expense reporting. And those short-term effects turn into long-term impacts:**

- **Productivity is up** as employees spend less time on expense reporting and more time working.
- **Morale is improved** because employees can do expense reports on their mobile devices as naturally as they do most other tasks.
- **Compliance increases** because your policy is built into the solution.
- **Time and money are saved** from automating routine tasks.
- **You have more visibility** into where money is going and can make informed decisions about the future.
- **You have better control** over your cash flow.
- **You have more consistency** in your processes.
- **Your employees have more time** to meet with prospects and customers.



## Next Steps



**Identify the biggest problems your company experiences when it comes to employee spend management, including:**

1. Negotiating the lowest cost
2. Streamlining processes
3. Operational efficiency
4. Improving supplier negotiations
5. Visibility into T&E spending
6. Working with preferred vendors
7. Compliance, adoption, data insight into spend and other KPIs



**Build your internal support network**

1. Hold meetings with internal stakeholders to showcase SAP Concur
2. Identify your internal champions
3. Who's influential in gaining buy-in across the entire company?
4. Who is clearly ready for change?
5. Engage key stakeholders and discover a better way of managing employee spend



## We're **SAP Concur**

SAP Concur has built a thriving global community of small and medium-sized businesses powered by connection.

Connected solutions help you drive growth by revealing the risks and opportunities hidden in your spend management data. And our connected network of businesses allows you to unlock the collective knowledge, data, and buying power you need to reach your goals. In short, we grow with you.

We believe businesses of all sizes can change the world – but sometimes they need a little help bringing their visions to life. Business owners need powerful tools that free up time so they can create. They need a clear, simple view into the vital statistics of their businesses. They need readily accessible innovation and insights. And they need a champion who will support their growth at every step along the way.

**Want more info?**

**Buyer's Guide to  
Expense Automation**

**Considering automation?**

**Self-guided tour**





## Learn more at [concur.com](https://concur.com)

### SB DESCRIPTION enUS (19/02)

© 2019 SAP SE or an SAP affiliate company. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company.

The information contained herein may be changed without prior notice. Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors. National product specifications may vary.

These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

In particular, SAP SE or its affiliated companies have no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation, and SAP SE's or its affiliated companies' strategy and possible future developments, products, and/or platforms, directions, and functionality are all subject to change and may be changed by SAP SE or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, and they should not be relied upon in making purchasing decisions.

SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. All other product and service names mentioned are the trademarks of their respective companies.

See [www.sap.com/corporate-en/legal/copyright/index.epx](https://www.sap.com/corporate-en/legal/copyright/index.epx) for additional trademark information and notices.