

9 Best Practices

for Controlling Costs
in a Remote-Work World



As apps and data have moved to the cloud, it's become more common for workers to move work to their home offices.

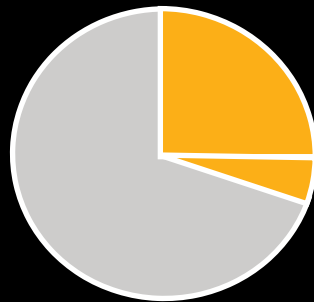
Remote work is a trend that shows no sign of slowing. It alleviates commutes, allows organizations to hire talented employees wherever they may live, and provides more flexibility and work-life balance. It also builds in redundancy and resiliency if a workplace isn't available due to anticipated or unforeseen circumstances, from a renovation or broken air conditioning in summer to a disaster like a fire or flood to work-from-home mandates.

Oftentimes, remote working may grow organically in an organization, rather than as a top-down program. If your work-from-home program developed on an ad hoc basis, it's advisable to take a step back and consider how it impacts your travel and expense policies. What can you do to improve the employee experience while ensuring your organization gets the data it needs to quickly adapt to change and stay in control of finances?

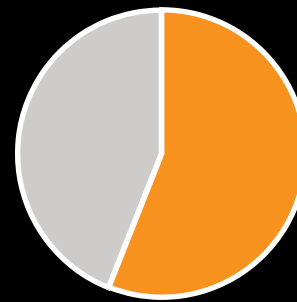
In this guide, we've collected tips from our customers and inside experts on how to use SAP Concur solutions more effectively in this new work-from-home world.

173%

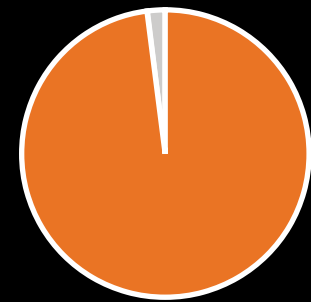
Growth in employees working at home since 2005 (prior to COVID-19).¹



25-30%
Expert estimate of how much of the workforce will work from home on multiple days each week by end of 2021.²



56%
Employees who have a job that could be done at least partially from home.³

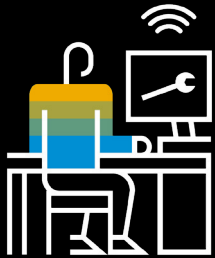


98%
Remote employees who would like to continue to work at home at least some of the time.⁴

01

Determine New Remote-Work Expense Policies

While employees most likely don't miss their commute, they might miss their workspace and equipment. Consider how you can best support your employees who work at home:



Office equipment and furniture

It takes just a few hours of working at a dining room table to realize how the right equipment can impact productivity and health. Now is the time to consider how much your organization will reimburse employees to purchase the furniture and equipment they need to work effectively. If providing a spend allowance, determine if employees can purchase their choice of office equipment or if they must choose from a pre-approved list from a particular supplier.



Computers and devices

Similarly, employees may be using personal devices to get their work done from home, particularly if they used a large desktop computer in the office. Many companies provide a limited number of choices for technology equipment (e.g., Windows or Apple devices) so that the IT team can support and keep intellectual property secured remotely.



Mobile phone and internet

While employees may have existing personal mobile phone and internet plans, those plans likely weren't chosen with the needs of work in mind. Employees with limited cell phone data plans or spotty internet service may need to be reimbursed if you require them to upgrade to an uncapped data plan or purchase a cellular hotspot.

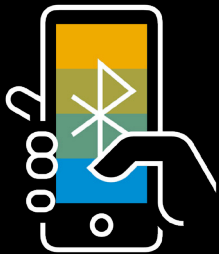
02

Implementing and Rolling Out New Policies

When implementing new work-from-home expense policies, form a team to review and offer input. These stakeholders can tell you if they have received questions on other types of expenses from their work-from-home employees that you may not have considered. When rolling out the new or updated policy, make sure you communicate clearly and regularly to managers and employees to ensure everyone is on board with the changes.

Keep in mind that your newly remote workforce and managers might not be familiar with the process of submitting or approving expenses if they don't regularly travel for business. Schedule training to ensure that remote employees understand how to submit expenses and that managers are comfortable creating and approving expense reports. This includes verifying that managers have their profile set up correctly in Concur® Expense, so they can receive emails alerting them when expense reports are ready to approve and are properly reviewing attached receipts.

New or expanded work-from-home expense types to add to Concur Expense:



- Internet service
- Mobile device plans
- Utilities
- Computer equipment
- Office furniture
- Office supplies



- Daycare
- Subscriptions
- Online fitness classes
- Virtual meeting lunches
- Client and prospect gifts and entertainment

03

Track Unusual Circumstances with SAP Concur Solutions

When it comes to business, you need to expect the unexpected. You can track the direct impact of unusual events on your business using Concur Expense.

For example, if you incurred direct costs related to COVID-19 in 2020, here are a few ways you could track those charges in Concur Expense:

- Create a project code to track direct COVID-19 expenses such as travel, hotel, and venue cancellation fees.
- Have employees add “COVID-19” in the Business Purpose field on the report level or line level as applicable.
- Create a unique “COVID-19” department that employees can select.

04

Modernize Your Policies and Processes

As more employees get comfortable working at home full- or part-time, it's a good moment to implement any new policies, programs, or tools that will help make things easier for employees, managers, and the finance department. This is also an excellent opportunity to review local and international regulations and requirements to make sure your travel and expense policies are still compliant.

One way you can modernize your expense management process is to reduce the role of cash. To determine what percentage of your program is cash, analyze payment types using **Payment Type Analysis** in the **Expense Processing** folder. This can help you determine which factors are contributing to low card adoption, such as geography, office culture, features, and training, so you can take action.

Also consider reviewing expenses from non-card holders to determine if you need to adjust your threshold for obtaining a corporate card. Corporate cards are the best payment method to ensure your organization is getting the employee-level spend detail it needs to control spending and fight fraud. Plus, they can help you keep cash spend to a minimum.

Does it need a receipt?



To streamline your process, consider setting different receipt requirements for items paid for via corporate card vs. out-of-pocket. For example, if your receipt policy requires receipts be attached according to the \$75 IRS threshold in the U.S., apply that threshold only to corporate card charges. If the purchase isn't charged to a corporate card, require a receipt, no matter how small the amount.

05

Gain More Control Over Costs

As your business shifts to supporting remote workers, it will become even more essential to gain greater visibility into your company spend as a whole.

Here are a few ways you can gain greater control of costs:

- Consider auto-routing expense reports over a certain dollar figure to a decision-maker such as the director of finance or CFO.
- Reduce your corporate card spending limit thresholds.
- Use **Concur® TripLink** to identify any non-compliant travel made by employees through outside bookings.
- Use **Intelligence** to dig into spend categories so you can find opportunities to cut back on unnecessary spend. You can also use it to discover which vendors are used most so you can try to negotiate potential discounts.
- Review your workflows to see if you need to require additional approvals to ensure cost savings and policy enforcement.
- Use pre-spend authorization with **Concur® Request** to let managers take control of spend, drive budget adherence, and enforce policy compliance – all before spend happens.

06

Increase SAP Concur Mobile App Usage

Prioritize adoption strategies for the SAP Concur mobile app to allow employees to track and approve expenses effectively, no matter where they are working. Easier processes improve compliance to policy and therefore your access to current, accurate data.

Here are a few tips to help you drive mobile usage:

- Use email signatures, intranet, and internal social media channels to promote adoption and user tips.
- If you have many required fields, consider making some unrequired to make entry easier within the mobile app.
- Use **Expenselt**® to help make expense entry easier and more accurate. A value-added service in the SAP Concur mobile app, Expenselt uses OCR technology to automatically flow information from receipt photos and emailed receipts into expense reports.
- Consider **Concur**® **Drive** if you have employees who accrue a large amount of mileage expenses. This GPS-based app automatically tracks mileage and flows it into expense reports, helping to save employees from under-reporting, so your organization reduces mistaken or fraudulent overages.

35% Employees who say it takes too long to submit expenses.⁵

07

To Train, or Not to Train?

A sudden influx of work-from-home employees can mean a larger number of users claiming expenses. That means you need to communicate with new users and give them the training they need to use the tools effectively. Remember that your in-office training tactics might not be suitable or even possible to provide to remote workers, so double-check your training methods, delivery, and curriculum to ensure it meets the needs of your work-from-home audience.

Provide 24/7 training content

Take advantage of the training content that SAP Concur provides for its customers.



- **Mobile app training**
- **Administrator training**
- **Reporting training**
- **And more**

If you think remote-work expenses will be minimal and short-term, such as equipping home offices, this could mean training all employees may not be worth the time. Consider how these one-off expenses may be rolled up departmentally so that a manager gathers and submits them. You could also provide a flat stipend that is automatically paid through payroll. Check with your payroll provider to ensure the stipend is treated as a general expense reimbursement so that it is not taxed.

08

Improve Your Reporting for Cash Flow

Because cash flow is a crucial concern, companies need to do everything they can to control employee-initiated spend. Use reports and analytics in Concur Expense to gain extra insight into spend so you aren't caught by surprise.

Reports to monitor include:

- **Expense Accrual by Date Range:** Review your outstanding credit card transactions and cash liabilities.
- **Missing Receipt Audit:** Track employees or expenses that commonly have missing receipts to better enforce policies and help new users submit expenses accurately.
- **Top Spenders by Employee:** Easily see which employees spend the most and ensure that all expenses are justified.
- **Workflow Cycle Times Details:** See an expense report's workflow cycle time and optimize your submission-to-reimbursement process.



Catch your cash before it flows

Consider pre-approval workflow or audit rules for high-volume departments to reduce rubber stamping and get a better view of expenses before they are spent.

09

Maximize Your SAP Concur Support

As an SAP Concur customer, your organization is required to have at least two and up to five designated **Authorized Support Contacts (ASC)** to gain Admin access to your **SAP Concur Customer Support Portal**, chat, and phone support. Review your ASCs and **consider training additional ASCs** so that you're prepared should your primary ASC be unavailable due to illness or business restructuring. You can designate additional ASCs via user permissions, Company Groups, or User Administrator (Professional only).

If you're an ASC, include as much information as possible when you submit a case to ensure it gets to the right team as quickly as possible. This includes things like screenshots; step-by-step details of process, browser, and version info; and the name and login ID of the user experiencing the issue.

Ensure that your administrators and users know how to access the **Help menu** within SAP Concur solutions.. For international employees, SAP Concur Help menu documents are available in 21 languages. You may also consider adding an SAP Concur solutions channel to your corporate communication platform so employees can connect directly with your support/admin team for user support, tips, and product announcements.



User Support Desk can provide additional support resources if you find that your team is overwhelmed by the increase of support requests. This can help ease the burden on your internal admins and IT team, and make sure your users get their questions answered in a timely manner.

Our expert support team is available 24x7 and assistance is tailored to your specific configuration, policy, and language.

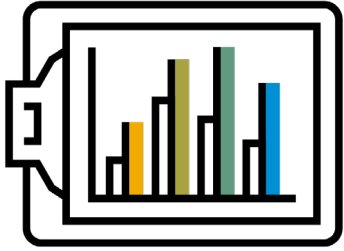
10

Improve the Employee Experience

To increase user adoption and policy compliance, it's crucial to improve your employees' experience with SAP Concur.

Share these tips to help make SAP Concur solutions easier to use:

- Copy an existing expense report by clicking the “Copy Report” button to save time creating reports for recurring expenses.
- Increase efficiency by editing multiple expense line items at once. Simply select multiple items and hit “Edit” (or “Allocate”) to take actions on multiple expenses at the same time.
- In the Report header, you can change the allocation to carry over to all expense line items.
- If you have Concur TripLink, users can open it directly from the SAP Concur mobile app by pressing the three lines (hamburger menu) at the top left corner.
- You or your users can become a member of the **SAP Concur Community** to discuss product features, learn about best practices, and network with peers.



SAP Concur 

To follow up on any of these best practices or learn more ways your business can get the most from its SAP Concur investment for your remote teams, contact your **Client Engagement Executive**.

About SAP Concur

SAP® Concur® is the world's leading brand for integrated travel, expense, and invoice management solutions, driven by a relentless pursuit to simplify and automate these everyday processes. The top-rated SAP Concur mobile app guides employees through every trip, charges are effortlessly populated into expense reports, and invoice approvals are automated. By integrating near real-time data and using AI to audit 100% of transactions, businesses can see exactly what they're spending without worrying about blind spots in the budget. SAP Concur solutions eliminate yesterday's tedious tasks, make today's work easier, and help businesses run at their best every day. Learn more at concur.com or the SAP Concur [blog](#).

¹ Global Workplace Analytics' analysis of 2018 ACS data

² Global Workplace Analytics, "Work-at-Home After COVID-19 – Our Forecast"

³ Global Workplace Analytics' analysis of 2018 ACS data

⁴ Buffer, *State of Remote Work 2020*

⁵ Forrester SAP Concur, *Improve Travel, Expense, and Invoice Management to Drive Better EX*, December 2019