

# Building a Business Case for **Expense Management Automation**

How to Secure Buy-In for Expense Reports That Write Themselves

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# 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:

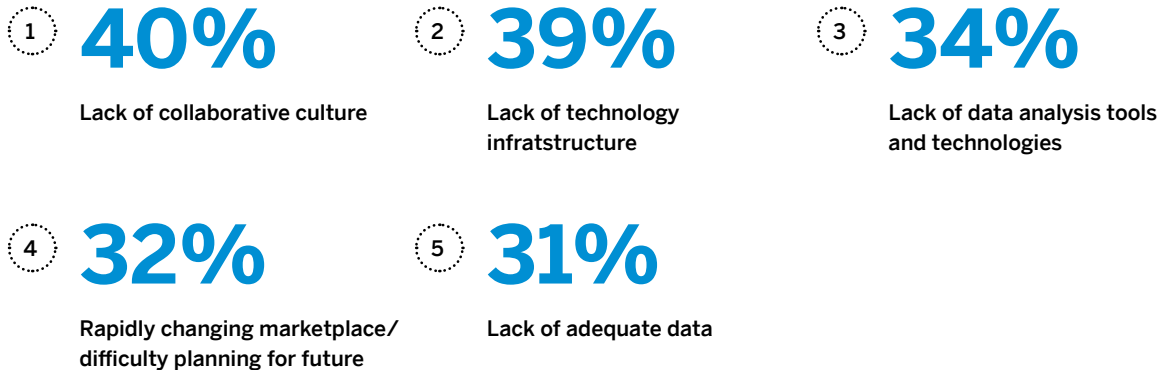
- 1** Automating the expense reporting process isn't a top priority for most companies. That's because many business leaders don't realize the positive impact fixing expense reporting can have on many other aspects of their business.
- 2** Company leaders rely on feedback from other key roles in the business before deciding to invest in change. Communicating with key stakeholders can help make that change happen.



## Obstacles to Strategic Goals

Oxford Economics and the SAP® Concur® business unit of SAP® surveyed 500 finance and IT leaders. In addition to overall revenue growth, many companies surveyed said their top goals included increasing their operational agility, efficiency, and productivity. But many face similar challenges in reaching those goals.

### Top 5 Barriers to Improving Company Agility, Efficiency, and Productivity<sup>1</sup>



Businesses are also 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 invoicing to a smarter, cloud-based — and even mobile — invoice process provides value across the board.

1. % of respondents. Source: [Oxford Economics, Leadership in a New Era, 2021](#)

## Why Does Change Take Time?

With increased internal pressure to make the right decision, due diligence before purchase is becoming more independent and in-depth. But a diversity of opinions and priorities among stakeholders can make consensus elusive, causing purchase processes to stall entirely. Early engagement of key stakeholders is crucial to a successful project.

### Top Buying Challenges:



Decisions are made by committee.



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



## Who Will Be Involved in This Decision?

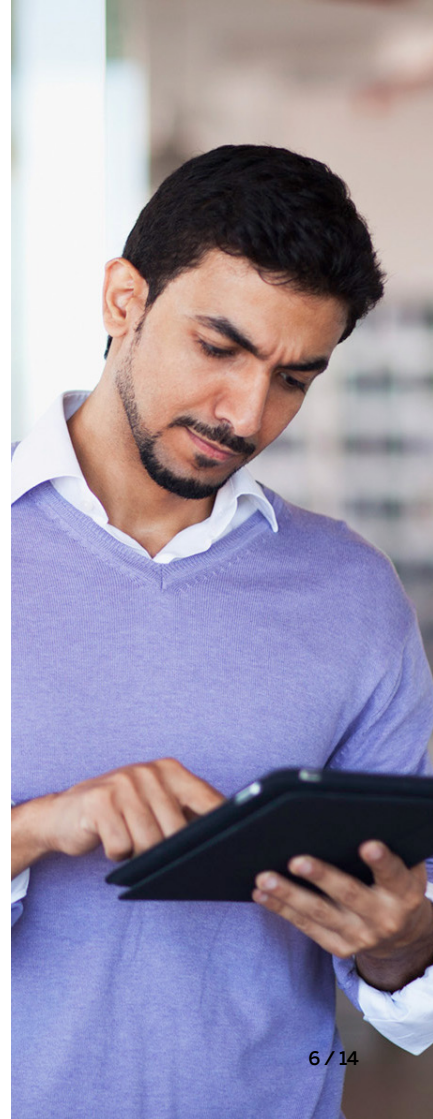
The best way to get support for an expense automation solution is by creating a groundswell from the bottom up.

- **Employees** have to compile and submit receipts.
- **Managers** have to review and approve expenses.
- **Finance personnel** need to process expense reports and reconcile budgets.
- **The IT department** needs to manage and compute all the data.
- And your **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.



## See Where Interests Align and Engage Stakeholders

As a project lead, you can help key stakeholders understand the new technology and the unique benefits for their area of business. Identify shared values to help them focus on what unites them rather than what separates them.

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

		Streamlining processes	Security and Compliance	Visibility Into Spend	Cost Control and Savings	Employee Safety, Satisfaction, and Support
	<b>Finance Leader</b>	X	X	X	X	X
	<b>IT</b>	X	X			X
	<b>Finance Team</b>	X		X	X	X
	<b>Company Leadership</b>	X	X	X	X	X



# Speak the Finance Leader's Language

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

We know – the buck stops with your finance leader, 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.

## **Automated Expense Reporting Helps Solve Issues By:**

- **Providing visibility** into employee spending across the organization.
- **Getting rid** of 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 expense submissions with corporate card changes** and electronic receipts to create a secure system of checks and balances.
- **Detecting and helping prevent fraud before it happens** by proactively enforcing corporate spending policies and flagging non-compliant transactions.



## Common Objections

“ We don’t have the budget.”

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

### Talking Points:

- An automated expense management system saves money by making employees more productive and eliminating out-of-policy spending.
- Cloud-based software makes it easy and inexpensive to get started, and ongoing costs are low.
- \$18 per expense report is the average savings of T&E users after automating.<sup>2</sup> Even more savings come in increased productivity and better cash flow management.

“ How much will it cost?”

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

### Talking Points:

- Consider the time it takes employees to find and organize receipts, enter information into spreadsheets, print, and attach paper receipts, then print and submit reports.
- Add the time for the back-office to check for accuracy, plus time for managers to review, approve, and reimburse employees. Multiply that time by the yearly number of expense reports.
- A cloud-based mobile app can help streamline that process and make employees happier.

2. Analysys Mason 2022, Travel, Expense, and Vendor Invoice Management Study



# 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:



Look for a solution that is connected with the systems you already have, so IT doesn't have to build new integrations.



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



Look for a solution partner with end-user training, resources, and administration for reliable support.



Look for a solution that offers reliable performance and security. SAP Concur solutions provide secure hosting facilities and audits and meets current compliance and security standards.

## Respond to Common 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 can be to deploy a cloud-based mobile app, you'll see we can't afford to wait to make this change and proactively address this painful, frustrating, and costly process.



# Add Value for the Finance Team

Your finance 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.



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



Reimburse employees quickly and easily.



Help manage compliance across the organization.



Minimize manual paperwork and data entry.

## Offer Solutions by Showing What Expense Automation Can Do:

- **Give them complete visibility** into employee expense spend.
- **Allow spend analysis by department**, vendor, spending trend, and expense type.
- **Automate their process** by leveraging digital receipt capture and expense report submission.
- **Reduce their processing time**, manual entry, and paper trails.



# Sum It Up for Leadership

Company leadership cares about total value, ROI, and consensus from all of the leaders in the 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.

## Leadership May Ask

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

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

- **Higher productivity** as employees spend less time on expense reporting and more time working.
- **Better morale** because employees can do expense reports on their mobile devices as naturally as they do most other tasks.
- **Increased compliance** because your policy is built into the solution.
- **Save time and money** from automating routine tasks.
- **Clearer visibility** into where money is going to make better decisions about the future.
- **Better control** over cash flow.
- **Better consistency** in your process.
- **More time for employees** to meet with prospects and customers.



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

- Negotiating the lowest cost.
- Streamlining processes.
- Operational efficiency.
- Improving supplier negotiations.
- Visibility into T&E spending.
- Working with preferred vendors.
- Compliance, adoption, data insight into spend and other KPIs.

### **Build Your Internal Support Network**

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



# How SAP Concur Solutions Can Help

SAP Concur is a business unit of SAP that's built a thriving global community of business of all sizes 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.

## 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 highly-rated SAP® Concur® mobile app guides employees through business trips, charges are directly populated into expense reports, and invoice approvals are automated. By integrating near real-time data and using AI to analyze transactions, businesses can see what they're spending, improve compliance, and avoid possible blind spots in the budget. SAP Concur solutions help eliminate yesterday's tedious tasks, make today's work easier, and support businesses to run at their best.

Learn more at [concur.com](https://concur.com) or at the SAP Concur [blog](#)

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