



SAP Concur 

SAP Concur Barclays Case Study | PUBLIC

Barclays Gains Access to Integrated Travel & Expense Data with SAP Concur Solutions

One Global Travel and Expense Policy Improves Compliance and Provides a Full View of Travel Spend

Quick Facts

Company Name

Barclays®, plc

Solutions

- Select Care
- Concur® Request
- Expenselt®
- Intelligence
- Policy Audit
- Service Administration Elite
- Concur® Travel
- Concur® Expense
- Concur® Triplink
- UserSupport Desk

Industry

Finance

Company Size

85,000 employees worldwide

Location

London, UK

Why SAP Concur?

Barclays wanted to create one global travel & expense policy with data visibility across an integrated system. With the help of SAP® Concur® solutions the company established a unified policy aligned with simplified expense types, strengthening audit and control processes, and ensuring consistent data across the organization.

ABOUT BARCLAYS

Barclays moves, lends, invests, and protects money for customers and clients worldwide.

Headquartered in London, England, Barclays is a consumer, corporate, and investment bank, and one of the world's largest and most respected financial institutions, with a heritage of success, quality, and innovation stretching back over 325 years. Operating in 50 countries and employing around 85,000 people across the globe, it helps millions of communities, millions of individuals, and millions of businesses thrive.



The Challenge: Unify Barclays Global Travel and Expense Policies

Barclays is an organization dedicated to creating opportunities. To achieve that mission, the London-based financial institution moves, lends, invests, and protects money for customers worldwide. With offices around the world, Barclays found itself with numerous local travel and expense policies and faced a growing number of expense types across two legacy systems. Barclays turned to SAP Concur solutions to help it implement an integrated travel and expense system, simplify its expense types, and improve data visibility.

BUILT TO PURPOSE, FROM DAY ONE

Migrating Barclay's 85,000 travel and expense users required participation from across the organization and around the globe. The first step to implementing Concur Travel & Expense was convening a stakeholder working group to ensure the travel and expense organization was meeting the needs of employees.

Made up of representatives from Technology, Compliance, Tax, HR, and Finance as well as from end user groups across the organization, working groups were essential to ensure SAP Concur solutions were fit for Barclays purposes from day one. The group worked to finalize and define expense types, identify needs for customized interfaces, and members from the compliance team ensured the gift and entertainment policies were aligned with regulations in relevant markets.

Beyond the implementation process, the working groups assisted with change management across the organization, opening lines of communication, encouraging adoption, and acting as champions for the new global T&E policy.

DEFINING EXPENSES, GAINING VISIBILITY

Working closely with the Chief Controls Office to define expense types and identify gaps and overlap in existing policies, the Barclays team ultimately rolled out one global policy. And, with fewer than 80 expense types, Barclays achieved total alignment between its expense categories and this new global T&E policy.

Along with alignment across the globe and a greatly simplified number of expense types, Barclays used Concur® Expense to improve the employee experience of entering expense reports. By grouping expense types into simple to understand categories Barclays was able to reduce miscategorized expenses. For example, when expensing air travel users are presented a dropdown menu with associated costs such as baggage fees or onboard Wi-Fi.

Not only is it easier to enter expenses, but every expense type is addressed in a corresponding section of the T&E policy, allowing employees to quickly and easily code expenses appropriately reducing the number of rejected expenses and saving time throughout the approval process.

Of course, the rollout has not been without growing pains. After seeing a high volume of expense claims, Barclays is considering limiting the number of claims an employee can submit each month to better manage its transaction volume.

In addition, Barclays encountered challenges ensuring product features were integrated across its solutions. While Barclays is still working to customise service support, after adopting Select Care, education around product releases improved.

SIMPLIFYING EXPENSES AROUND THE GLOBE

With a goal of gaining spend visibility across countries, simplifying expense types, and consolidating its global travel & expense policy, Barclays continues to roll out SAP Concur solutions in its largest markets.

With SAP Concur solutions, Barclays now has access to clean, consistent data and with this integrated view of end-to-end travel spend, can save money in future supplier negotiations and make smarter budgeting decisions.

And, with Select Care, Barclays has ongoing personalized support, access to technical knowledge, and a solution to ensure product integration goes smoothly so Barclays' employees can continue creating opportunities for employees around the globe.

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 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 or at the SAP Concur [blog](#).

EXPENSE EFFICIENCY

Travelers can capture receipts and submit expense requests electronically, from their mobile devices. Everything flows through the approval and reimbursement process with time to spare.

100% AUDIT

Policy Audit—providing 100% audit capability—has helped train employees to use the correct expense types and mapping each audit question to the relevant T&E policy clause helps manage policy compliance.

UNDERSTANDABLE EXPENSES

Clearly defined expense types and a strong audit process not only support control and compliance efforts but also provide Barclays accurate, timely data.

TOTAL VISIBILITY

The Travel and Expense department had full visibility into all expenses, providing data for negotiations in annual RFPs.

Follow SAP Concur



Learn more at concur.com

CS BARCLAYS enUS (21/01)

© 2021 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/trademark for additional trademark information and notices.