

From complexity to control:

A case study of Weatherford's global T&E transformation with SAP Concur



About Weatherford

Weatherford delivers innovative oil and gas technologies and services to help customers enhance efficiency and drive sustainable outcomes across energy operations worldwide.

Years of decentralized T&E processes spread across 40+ corporate card programs and dozens of local systems left Weatherford with limited visibility into spending, high manual workloads, and frustrated employees. With more than 18,000 employees operating across 75 countries, this energy company required efficient, scalable operations for travel and expense (T&E) management to help streamline its global energy services.

With SAP Concur solutions, the company consolidated its tools, automated key processes, and empowered employees with a consistent, policy-aligned experience worldwide.

This global transformation allowed Weatherford to:

- Increase monthly expense report processing volume by 400%
- Grow T&E card issuance by 800%
- Reach 100% adoption of its corporate card program
- Retain 19% more cash by switching to a company-paid model
- Reduce manual expense reviews by over 90%
- Improve workforce efficiency by 47% and reduce T&E operations costs by 26%
- Save an estimated \$5 million through automation, visibility, and control

Weatherford's SAP Concur Solution Suite

- [Concur Travel](#)
- [Concur Request](#)
- [Concur Expense](#)
- [Intelligent Audit](#)
- [Concur Advanced Care](#)
- [WalkMe for SAP Concur solutions](#)
- [Budget](#)
- [Consultative Intelligence](#)
- [Company Bill Statements](#)
- [User Support Desk](#)
- [Expenselt](#)
- [Intelligence](#)
- [Integration Services](#)
- [Concur Tax Assurance by Blue dot](#)

Results at a glance

400%

increase in monthly expense reports processed

47%

increase in workforce efficiency

800%

growth in T&E card issuance

100%

T&E card adoption

26%

reduction in T&E operations costs



770%

increase in card rebates

90%

reduction in manual expense report reviews

52%

drop in expense report rejection rates

\$5M+

in total savings opportunities identified

19%

more retained cash

\$17

saved per expense report

0

master data errors (down from 60,000)



Uncovering an opportunity for global streamlining

Founded in Texas in 1941, Weatherford has grown into a global organization through decades of strategic acquisitions and international expansion. As a result, the company had a decentralized approach to T&E, with different regions and offices using separate tools and processes to manage bookings, issue corporate cards, and process expense reports. At one point, the company had more than 40 separate corporate card programs, along with dozens of localized systems to approve and reimburse expenses.

This fragmented structure made it nearly impossible to manage T&E with any visibility or consistency. Corporate finance leaders lacked a clear line of sight into spending across countries and departments, impacting their ability to plan budgets, identify trends, or take action at scale. Regional leaders faced similar challenges, with limited access to real-time data preventing them from analyzing spending costs or optimizing vendor contracts.

In many countries, HR and finance coordinated cash advancements for travel or employees managed their own T&E expenses while traveling, often for extended periods. Without a unified system or global agency, employees frequently booked outside of company policy, which impacted the organization's ability to meet duty-of-care requirements. This also increased exposure to risks such as fraud and higher travel spending, making it challenging for the business to maintain compliance and control over its travel programs.

Then came the pandemic. Global travel temporarily ground to a halt—but when travel picked up again, it did so quickly. Teams around the world needed to be back in the field, back in meetings, and back in motion. However, the company's legacy processes weren't equipped to support the speed of that return, and both employees and company leaders knew they didn't want to go back to the old way of managing T&E.

HR and finance wanted to eliminate cash advances. Employees no longer wanted to pay for travel out of pocket, while company leaders wanted more visibility.

“When global travel resumed post-COVID, our leadership recognized the need for a more efficient and compliant approach to managing travel and expenses,” said Jenni Allman, Head of Travel and Expense at Weatherford. “They made the strategic decision to provide each traveler with access to T&E cards, ensuring streamlined processes and better oversight.”

Weatherford saw a clear opportunity to unify its T&E operations under one global platform using SAP Concur solutions for cloud-based spend management. Doing so would mean better visibility, improved compliance, a consistent employee experience, and the strategic enablement required to power the future of its global enterprise.

As a global leader in energy services, Weatherford works with operators to unlock the full value of their oil and gas assets. Weatherford combines proven technologies and advanced digital capabilities with personal service to help the energy industry be more efficient, flexible, and sustainable, ensuring the customers and communities they serve have a reliable, cost-effective source of power to live, work, and thrive.

With more than 18,000 employees operating in 340 locations across 75 countries, travel is essential for Weatherford's employees. Whether supporting remote field operations, pitching new clients, attending industry events, collaborating with partners, or driving internal alignment across locations, Weatherford's employees are always on the move. To power its global operations, a modern, integrated travel and expense program is essential to operating with speed, accountability, and care.

After years of managing T&E individually across its different markets, Weatherford saw an opportunity to move away from its fragmented approach. With its vision for a single, global T&E process, Weatherford aspired to better support its staff while providing company leaders with deeper visibility into spending.

By partnering with SAP Concur, Weatherford was able to launch an ambitious transformation that allowed it to modernize and scale its T&E program across the enterprise.

"Weatherford has transformed a dispersed T&E department into a cohesive global program," Allman said. "Amidst exponential growth, SAP Concur has helped us streamline processes, enforce company policy, and deliver significant savings to the company."

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Head of Travel and Expense, Weatherford



Designing a modern T&E program

After years of operating with localized processes and limited visibility, Weatherford's leaders saw an opportunity to reimagine T&E as a centralized, data-driven capability that could serve its global organization in the modern era. Their goals encompassed more than just improving operational efficiency or reducing costs; they wanted to enable smarter decision-making, improve the employee experience, and support global growth for years to come. To achieve these goals, they knew Weatherford would need to change both the technology and the company's holistic approach to T&E.

Company leaders understood that a globally integrated T&E program would allow Weatherford to:

- Support a distributed workforce with consistent policies and tools
- Gain real-time visibility into spending across all regions

- Eliminate manual reconciliation and outdated, disjointed systems
- Streamline audits and improve compliance
- Enable future scalability through clean data and system integration

Weatherford's desired future state was clear: **one system, one process, one source of truth for T&E**. A solution that didn't just process expenses but elevated its entire global operations. However, implementing a global T&E program across 75 countries goes beyond flipping a switch to turn on new technology. For Weatherford, success depended on strategic prioritization, unwavering commitment to cross-functional collaboration, and a relentless focus on data integrity.



Implementing at a global scale

Turning Weatherford's global T&E vision into reality meant more than just deploying new tools. It meant leveraging a strategic rollout that could scale across the globe while aligning teams, cleaning up legacy data, and minimizing disruption.

The company partnered with global implementation partner [Acquis Consulting Group](#) to help manage the rollout of Concur Expense, using a phased approach that prioritized locations based on travel volume, spend, and operational readiness. Working directly with SAP Concur, Weatherford also implemented its global travel management company (TMC) integration, replacing dozens of local agencies with a centralized partner embedded directly into the Concur Travel platform.

"Implementations were prioritized by highest volume of travelers, expense report submissions, and spend. This analysis allowed executive buy-in and assistance for a path forward," Allman said.

Each rollout involved close collaboration with IT, local finance leads, and business users to define requirements, solicit employee feedback with user acceptance testing, and prepare teams for go-live. Once a region was launched, finance teams shut down legacy systems to remove confusion and ensure the full adoption of the new process from Day 1.

One of the biggest challenges Weatherford knew it wanted to solve was integration with its ERP. Its previous platform struggled to integrate with the ERP, leading to a 60% failure rate when importing T&E data.

To resolve this, the team built a dashboard that compared records across systems and pinpointed inconsistencies. That integration work proved foundational to the transformation. Clean data meant employees could be onboarded properly, expense reports flowed smoothly, and the T&E team no longer had to spend time troubleshooting missing user profiles or failed data imports.

Creating a global T&E solution with SAP Concur

Weatherford's transformation was anchored by a strategic rollout of SAP Concur technology designed to simplify, standardize, and scale the company's global T&E operations. Already a user of Concur Expense in 11 countries, Weatherford deployed several solutions from SAP Concur, including travel management software and corporate expense tracking tools, to its offices around the world. This strategic decision allowed the company to move away from its fragmented, manual approach and to introduce a single platform offering control, visibility, and efficiency.

Weatherford expanded its use of **Concur Expense** and **Concur Travel** to locations in 75 countries, giving the organization a unified T&E management platform to gain visibility into travel activity and spending in real time. This global, integrated T&E platform allowed Weatherford to standardize processes, enforce policy consistently across regions, and support employees with a safe, seamless experience no matter where they worked or traveled.

The company also centralized its corporate card program, partnering closely with its corporate card provider Citi to maximize efficiency and rebate opportunities. With 100% of cardholders now using CitiManager, Weatherford has been able to dramatically improve its control, reduce delinquencies, and accelerate time to value.

"We moved thousands of employees onto the T&E card. This not only enhanced financial control and compliance, but also generated a significant increase to our rebates. These rebates effectively offset the costs associated with SAP Concur licensing, resulting in a positive return on investment," Allman said.

"We have better visibility into employee spend by using our corporate T&E cards, while also ensuring adherence to our company's policies," said Scott Weatherholt, Chief Compliance Officer at Weatherford. "SAP Concur solutions have helped us drive adoption of our T&E cards, which has made a huge contribution to the company by allowing us to realize much larger rebates under this program."

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Chief Compliance Officer, Weatherford



With **Company Bill Statement**, the finance team no longer needs to manually match every transaction to an expense report. Instead, card charges are automatically captured, categorized by expense type, and assigned to each cardholder’s statement. Employees simply review and submit with a few clicks, which eliminates manual entry and dramatically speeds up reconciliation.

To improve compliance and reduce workload, Weatherford implemented **Intelligent Audit** to automate expense review and flag policy violations using AI. The tool automatically scans expense reports for out-of-policy spend, duplicate charges, and missing documentation so the T&E Team can focus on managing exceptions instead of reviewing every submission manually.

“We’ve been able to eliminate our processor role because all the manual validations we used to do on the backend are now automated,” said Allman. “We worked with our local finance teams to write custom

scripts in Intelligent Audit. The built-in OCR helped tremendously by validating receipts against the entered expenses. That automation—along with fewer help desk tickets and the removal of central travel account card reconciliation—was a big part of our 47% workforce efficiency gain.”

To improve the user experience and reduce support demands during the rollout, Weatherford implemented **WalkMe for SAP Concur solutions**, an in-application training tool that provides employees with real-time guidance as they navigate the SAP Concur platform.

“When I took over T&E in January 2022, it was literally just me in the T&E department,” said Allman. “We needed help supporting employees with expense report submissions. WalkMe provided an interactive tool that allowed employees access to step-by-step training, reducing the amount of user support requests.”



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Jenni Allman

Head of Travel and Expense, Weatherford



The team configured WalkMe to deliver interactive, just-in-time training while also mandating that users review key internal policies like T&E guidelines, corporate card rules, and resources hosted on the company’s SharePoint site. The result was a more scalable training model that lowered help desk ticket volume and gave employees immediate access to the information they needed instead of having to deal with training bottlenecks.

To support ongoing administration and ensure the internal team had the resources they needed to manage such a large rollout, Weatherford also relied on the **SAP Concur Advanced Care support service**. This high-touch support model gave Allman and her team access to dedicated experts who could help troubleshoot issues, interpret errors, and guide configuration decisions.

“Advanced Care has helped tremendously by walking me through the errors, where in Concur the issues originated, and why they were happening,” Allman said.

Global transformation by the numbers

Weatherford's revamped travel and expense (T&E) program, powered by solutions from SAP Concur, has significantly enhanced its global operations. By consolidating 40 corporate card programs and numerous local systems into a single unified platform, the company achieved remarkable efficiency, compliance, and cost improvements.

Monthly expense reports processed soared by 400%, increasing from 1,300 to more than 4,500. T&E card issuance grew by 800%, with nearly 7,300 cards issued over three years, and corporate card adoption reached 100%.

"We've been able to realize much larger rebates under this program," said Weatherholt, referencing the company's 770% growth in annual rebate earnings. Additionally, the switch to a company-pay model resulted in 19% more retained cash within six months, while T&E operation costs dropped by 26%, yielding an estimated \$5 million in savings into 2026.

Centralizing expense report submissions eliminated manual workflows, slashed master data errors from 60,000 to none, and enabled automated ERP posting for greater visibility and consistent results.

"Concur Travel & Expense has made managing expenses easier and more efficient," said Kishore Sundararajan, Senior Vice President of Systems and Process and Chief Information Officer at Weatherford. "By integrating disparate data sources, ensuring compliance with policy, and integrating audit capabilities, we've streamlined our processes and set a new standard for efficiency and transparency."

With Intelligent Audit, Weatherford automated more than 90% of expense reviews, reducing process burdens and minimizing expense report rejections by 52%. This, coupled with a 47% boost in workforce efficiency, has driven long-term scalability and operational improvement.

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Senior Vice President, Systems & Process and Chief Information Officer, Weatherford





Continued innovation with Concur Tax Assurance by Blue dot

Although Weatherford achieved substantial success from its initial adoption of SAP Concur solutions, the company is not resting on its laurels. It is actively implementing **Concur Tax Assurance**, a sophisticated solution to address the complexities of global indirect tax compliance. By integrating this solution with its current SAP Concur tools, Weatherford aims to further reduce tax risks, streamline compliance efforts, and ensure accuracy in managing regional tax regulations.

This forward-looking investment supports Weatherford's long-term vision for operational precision and scalability.

"The evolution of Weatherford's T&E program from disparate systems to a robust, consolidated process

using SAP Concur has allowed us to accelerate process efficiency and improvement at a pace not seen prior," said Matthew Smith, Senior Director of Continuous Process Improvement at Weatherford.

By adding Concur Tax Assurance to its toolkit, Weatherford is positioning itself to adapt seamlessly to evolving global tax requirements, enhancing its ability to maintain compliance and reduce administrative burdens.

With its ambitious goals, Weatherford continues to drive transformation through cutting-edge technology. The integration of Concur Tax Assurance underscores the company's commitment to fostering operational excellence, compliance, and efficiency for years to come.

Lessons learned: 6 best practices for transforming T&E

While the SAP Concur platform played a vital role in Weatherford's success, Allman suggests that organizations considering a large-scale transformation of their T&E processes think beyond technology. From executive buy-in to implementation flexibility, her experience provides a practical roadmap for transforming T&E at a global scale.

- **Secure executive sponsorship from the start.**

C-suite support can provide a T&E transformation with the visibility and momentum it needs, especially when competing for time and resources across departments. "Executive sponsorship is always the most efficient so the change can be driven from the top down," Allman said.

- **Have a plan A through Z.**

Even with strong planning, things rarely go exactly as expected. Preparing multiple contingencies and embedding flexibility helps keep projects moving when obstacles arise. "Always be prepared with alternative options in every scenario because there's always a solution for whatever the issue is," Allman said.

- **Involve others early and often.**

From requirements to testing, including cross-functional stakeholders helps to ensure the solution works in practice, not just in theory. "Ensure business requirements gathering includes all affected processes and systems and that dedicated resources from each are included in the project so nothing is left out," she said.

- **Turn mistakes into lessons.**

Recapping both wins and misses after each phase of implementation helps inform future rollouts while strengthening collaboration across teams. "Treat missed opportunities and mistakes as overall growth. Incorporate the lesson learned into future project plans," Allman said.

- **Design for compliance.**

Mapping out what compliance looks like for both your existing and proposed solutions can help you identify gaps and ensure a smoother rollout. "Complete process mapping of your current and future states. Do a gap analysis and call out any issues or risks so your stakeholders and executives can be aware," Allman said.

- **Invest in the right support model.**

For lean internal T&E teams like Weatherford's, post-go-live support can make or break long-term success. "The SAP Concur teams were instrumental in our transformation and success. They've been phenomenal," Allman said.

Turning T&E complexity into a competitive advantage

Weatherford's transformation of its T&E operations wasn't just a technology upgrade. It was a cultural shift in how the company manages spend, supports its people, and scales its business. What began as a response to T&E complexity became a catalyst for driving global efficiency, visibility, and control across the business.

By adopting a unified platform, empowering employees with the right tools, and automating what once required countless manual steps, Weatherford turned a business pain point into a strategic advantage. With SAP Concur solutions at the center of its global T&E program, the company isn't just keeping pace with its growth. It's laying the foundation for smarter, faster, and more connected operations worldwide.

Discover how solutions from SAP Concur for travel and expense management can help your business streamline operations and achieve breakthrough results. [Contact us](#) today to learn more.

Ready to extend your T&E transformation?

Explore our best practices for scaling travel and expense management globally.

[Get the guide.](#)