Strategies for Success – The White Paper Series from Concur

Implementation Best Practices: Pan European Automated Travel and Expense Solution

ABSTRACT

Automation of the travel booking and expense claim process is a growing international trend among businesses as a way to increase operating efficiency. Contrary to licensed software, implementing an on-demand solution is a short process not requiring a large drain of resources. Through careful planning and preparation, implementing an automated solution can be a quick win for organisations of all sizes looking to take control of this significant area of global spend. This white paper explores best practice recommendations and specific steps for successfully implementing an automated travel booking and expense claim processing solution.

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INTRODUCTION

Once an organisation has made the decision to purchase an automated travel and expense management solution, there are particular steps to follow to ensure a smooth implementation. In a typical implementation, there are three phases mapped out for maximum effectiveness.

Recently, some alarming statistics from the Gartner Group were published stating that 23 percent of major initiatives fail without adequate planning and training and 50-80 percent of companies experience high levels of resistance with regards to change. With this information, it's extremely important to plan properly for an implementation of this scope and to prepare your organisation for change adequately.

PHASED DEPLOYMENT – RECOMMENDED APPROACH

As a best practice, it's recommended to execute a phased implementation roll-out, making the project more manageable. A phased approach is especially important when there are more than three countries or business units with very different requirements in the deployment plan. The length of each additional phase after the initial deployment depends on the number of countries or business units and the complexity of requirements (i.e. Travel Allowance adds complexity) that must be added for each new country or business unit. Multi-phase deployments should look to leverage a set of global components (employee form, report header form, allocation form, expense types, workflow, audit rules, etc.) that can be leveraged by each country. This will reduce the timeline for phases after the initial deployment.

CLIENT RESPONSIBILITIES

During an implementation of a travel and expense management solution, you will need to be prepared to have your team conduct a series of tasks. Some tasks you may expect to be responsible for include: configuration decisions, centralised project management of internal business groups (i.e. business units, countries), file transfer process support with secure data encryption for employee load, list imports, exchange rate import and financial extract integration by developing a bridge programme. Your team may also need to develop plans for unit and system testing, prepare organisation for change management and train and support end users. The manner for which your team handles these responsibilities will have a direct impact on the overall success of the project.

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PHASE 1 – ANALYSIS AND DESIGN

Phase 1 of the implementation process actually starts during the sales process with the collection of data. The information captured during the sales cycle is shared with the implementation team responsible for your project, allowing them to setup your base service environment. Passing along information from the sales process will ensure your time is not wasted and provide you with the most rapid deployment possible. During this phase your chosen provider's implementation team will be doing the majority of the work, while your responsibility mostly consists of providing essential data.

Strategy Session

After the transfer of information from sales to the implementation team, the next step is to have a Strategy Session to discuss the project at hand. Since the majority of people on the implementation team have been involved in the sales process, a strategy session kicks off for the project to get everyone on the same page regarding expectations, setting up rules of engagement, solidifying goals and objectives, and defining roles and responsibilities.

Project Team Training

Once your provider's implementation team has had a Strategy Session, it is followed by training of your organisation's project team. This will teach the project team all they need to know about the automation of travel and expense management. The training begins the knowledge transfer process by providing the team with the information they need to know about the service to make the necessary decisions during the implementation process. The configuration kick-off and the subsequent financial system data requirements review are laser-focused meetings designed to rapidly make decisions about configuration choices to meet your company's specific needs and requirements.

Preparing for Change Management

As users adopt new systems, their productivity could be impacted for an initial period of time. This amount of time can vary up to 60 percent, based on change management strategies employed. To combat this, it's critical to focus on change management early in the process. Your service provider should be able to work with you to understand your company culture and its comfort level with technology and change.

Once the implementation team consultants configure your system, you'll be able to focus on change management testing. The key to the change management process is selecting a group of users for the initial deployment who will be integral to insuring that your deployment to your full organisation is a success. Characteristics of the types of users that can add value include having an early adopter mentality, an interest in being part of shaping change, a willingness to give feedback and are savvy Internet/technology users.

Feedback from this initial deployment group will be the core to developing your change management strategy for the rest of your organisation, as well as providing valuable feedback to refine and perfect how your service is ultimately configured. After the change management plan is reviewed by the implementation team, preparation for your initial deployment occurs.

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PHASE 2 – CONFIGURATION AND VALIDATION

With phase 2, you can expect your project team to invest more time on the implementation, while they are trained on system operation. Expect that a walk-through of the entire system will be provided to point out the configuration modifications that were performed to meet your organisation's specifications. This process further familiarises you with the flow of the system and prepares you for executing your test plan.

Complete Knowledge Transfer

During this time, you will learn how to use the tools for back office monitoring and auditing of the process. Expect a transfer of knowledge regarding both how to use the tool and how to establish policies and procedures within the back office organisation. Additionally, you will learn the ongoing routine processes for managing the system.

System Testing

Once your team is familiar with processes and procedures, the execution of the enhanced test plan occurs, noting any issues, concerns or challenges. Testing encompasses the entire system flow including unit tests of each item and system using sample expense reports and data from the corporate card feed. This will include the full cycle of extract for reimbursement and for updating of financial systems.

Fine-Tuning

Any necessary adjustments to the configuration based on testing results will be performed. You should also plan on conducting your own additional end-to-end system test to confirm changes have had the desired effect. All desired configuration updates are gathered together by your team and discussed with your consultant and then the configuration updates are performed together to increase efficiency. The configuration, as approved in your test environment, will be migrated to the production environment. Both the service provider's implementation team and your resources can then confirm the production setup.

PHASE 3 – READINESS AND DEPLOYMENT

The final phase of implementation is intended to test and refine your deployment methodology and production processes. This would be the appropriate time for you to start training your end users and validate production, while your service provider's implementation team will need to migrate the test system configuration to the production system and begin a pilot deployment generally consisting of 25-100 users. Lastly, a transition from the service provider's implementation team to client services is likely to occur. This is where you can receive ongoing production support for your newly implemented service.

The service provider can supply you with guidance while you execute a Readiness and Change Management plan, which should be given to you by your implementation team. These plans include communication templates, a trainer curriculum, template FAQ pages for end users, training manuals, end-user Web-based training and source files that can be used to create posters and other publicity-generating materials. Your project manager can help you structure an effective rollout plan.

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SUCCESS FACTORS

When implementing a travel and expense management solution there are several factors that are vital for success. First of all, having a strong executive sponsor and empowered project manager will give your implementation the attention and the push needed to excel quickly and effectively. When you have the internal support for the implementation project, commitment to a specific time frame and methodology will be critical to effective execution. Also, adequate staffing resources will ensure that you keep to your timeline, while a centralised project management team or global project team is an essential piece to act as the liaison between internal organisational units and the service provider.

In the beginning of an implementation, it's important to keep things as simple and flexible as possible. However, be willing to change process and layer-in complexity as needed over time. During the implementation project, be sure to follow the implementation scope and make all major decisions during the initial design session. And, before implementation is complete, pay special attention to creating a suitable change management strategy to communicate to the user base and avoid unnecessary resistance points.

GLOBAL TEAM

As mentioned previously, it is recommended to create a Global Project Team. The Global Project Team not only manages the deployment from beginning to end, but is also responsible for working directly with the service provider and keeping the rest of the organisation informed and on track. Some of the major roles that the Global Project Team can fill include project sponsor, steering committee (typically meeting once a month), project manager, functional lead and functional resources, technical lead, regional teams and an internal trainer, change management coordinator and/or communications staff.

SUMMARY

Implementing an automated travel and expense solution doesn't have to be a complicated process. The phased implementation approach has shown to be the fastest, most comprehensive method for rolling-out on-demand software. As long as you are prepared to dedicate the resources, together with your chosen service provider, your initiative can be completed successfully.

When taking on an implementation project, a great deal of time and energy can be wasted without the support of a knowledgeable service provider. Choosing a service provider with a proven implementation methodology and plenty of experience will help to ensure a smooth roll-out. As important as it is to have the guidance of an on-demand leader, assembling a supportive team of internal members is also essential. Once the implementation project is complete, your organisation can reap the benefits by claiming control of T&E spend.

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ABOUT CONCUR

Concur is the world's leading provider of on-demand Employee Spend Management services. Concur helps organisations control costs by uniting online travel booking with automated expense reporting, and streamlining invoice processing. Concur's suite of award-winning on-demand services allow companies to get up and running quickly so they can focus on what's most important. By automating and optimising business processes, Concur delivers actionable business intelligence and rapid ROI, helping companies increase efficiency, control employee spend and drive down operational costs. Concur's business travel and invoice solutions are trusted by thousands of companies and reach millions of employees worldwide. Learn more at www.concur.co.uk.

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