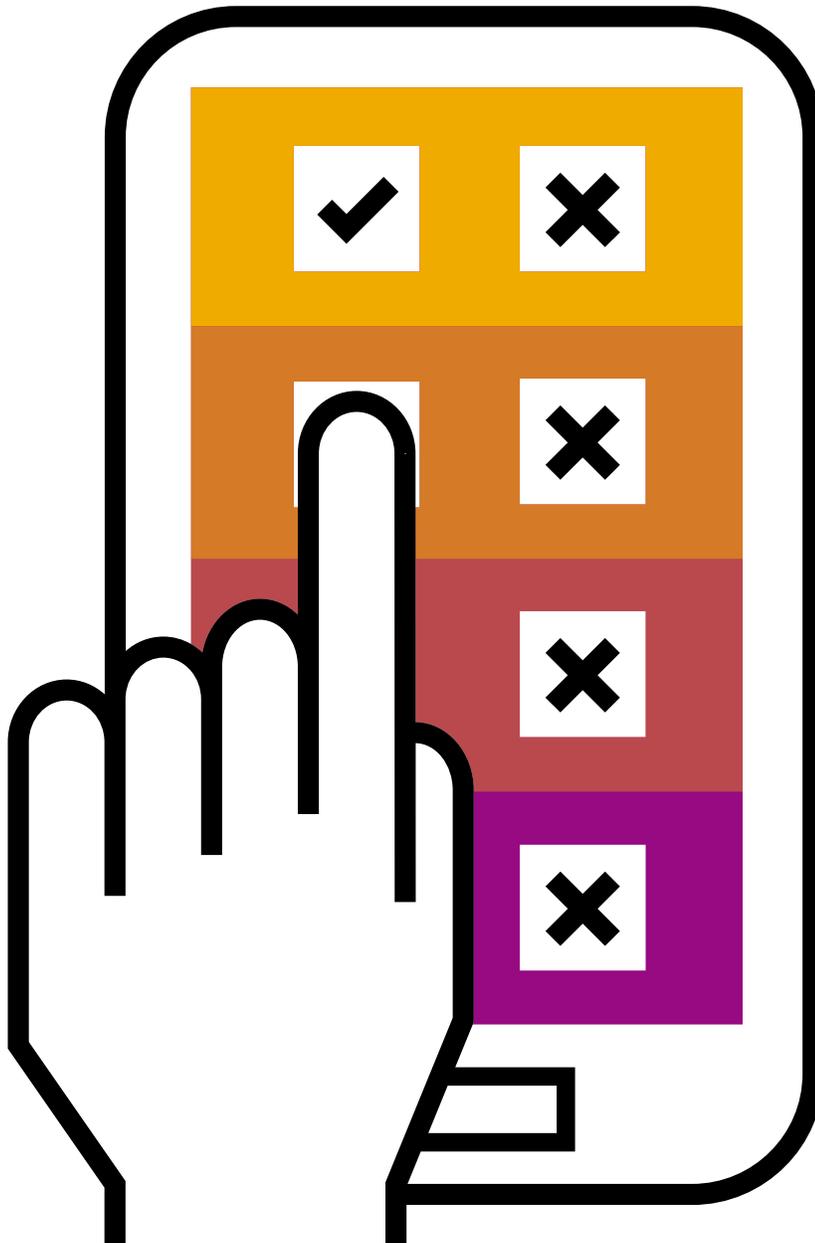


Visibility Matters Most During Uncertain Times

5 Things You Should Think About Now to Stabilize Your Travel and Expense Programs



Managing a business means managing change and responding to unexpected challenges. Now is a good time to think holistically about the spend across your company, review policies, and evaluate your travel and expense landscape. Use this checklist to support business continuity and your company's ability to adapt and redirect budgets to where it's needed the most.



1. PARADIGM SHIFT

As more normalized business operations resume, how should you adjust your travel and expense policy in support of the changing business environment? You may need to tighten criteria for travel, or you may want to encourage travel for certain groups of employees in a phased approach.

How to take action:

- Connect with your wider teams to discuss new go-forward strategies and forthcoming travel needs.
- Consider developing short, medium, and long-term policies that align with business strategies: this may include an automated pre-approval process and greater mobile adoption.
- Use downtime to assess your current system. Identify gaps and investigate solutions to fill those gaps.
- Encourage flexibility; fluid situations call for adaptiveness, and plans may need to change to respond to new priorities.



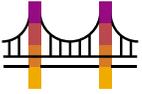
2. TRANSPARENCY IS OPTIMAL

Is your spend reporting as comprehensive as you'd like it to be? If you didn't have visibility into direct bookings before, now could be the optimal time to set up processes to get visibility into this. Make sure you can see all your travel spend across the entire ecosystem of your travel suppliers. Create actionable suggestions on how the company can improve the value it gets.

How to take action:

- Take a hard look at your current travel and expense operational reports. What works? What doesn't? What is essential in a post-crisis world? Can you see data from all sources? Adjust as necessary for end-to-end data transparency.

- Focus on identifying which information is most important. Align with stakeholders as to what they want to see in reports. Provide data in a simple format that's easy to understand at a glance.
- Your goal is to help the company maximize value for every travel and expense dollar spent.



3. BUILD BRIDGES, BREAK DOWN SILOS

Think about how well aligned your travel and expense programs and supporting technology solutions are within your business. Are they helping or hindering business travelers? For many organizations, this is an area of opportunity to optimize.

How to take action:

- Review how well teams are working together on business continuity and that your travel management solutions ensure you can identify and communicate, preferably two-way syncing, with all your employees in case of an emergency.
- Check to see if your travel and expense policies align with potentially new local and international regulations and requirements.
- Check travel and expense policy rules set in your booking and expense systems. You might want to ease up or write new rules around choosing the lowest rates, booking flights within two weeks of travel, or reasons for selecting business class tickets. Make sure policy rules are as automated as possible. A little work now can save untold hours down the road as they help increase employee productivity, support compliance, and reduce employee friction.



4. GET AHEAD OF THE NEXT DISRUPTION

It is not just a question of if the next crisis will take place, but when, where, and what magnitude. Your company needs to stay vigilant on preparedness and stay on top of 'duty of care' requirements as part of your travel program. You'll need a way to locate all your employees and communicate with them during emergencies and be prepared to respond to international regulatory inquiries.

How to take action:

- Review how well teams are working together on business continuity and that your travel management solutions ensure you can identify and communicate, preferably two-way syncing, with all your employees in case of an emergency.

- Make sure employee's profiles are up to date, and you have mobile phone numbers, emergency contacts, and other vital data not just for travelers but for all employees.
- Align and integrate your travel program with a global risk management service provider.
- Evaluate your travel program's and your team's readiness for an audit of domestic and international travel from tax authorities as there is a potential for greater scrutiny going forward.



5. PARTNERS FOR THE FUTURE

Now is an excellent time to reach out to your travel suppliers and travel management companies (TMCs), if you have one. Everyone's facing uncertainty, yet more than ever, we also need to think about business relationships moving forward. Both buyers and suppliers are reevaluating what the world of travel will look like in the future. Opening up channels of communication is the best way to find common ground and strengthen relationships.

How to take action:

- Start thinking about building sustainability into your travel and expense policies. For instance, as sustainability is becoming increasingly important, revisiting policies that encourage direct flights that reduce your travel carbon footprint, instead of focusing on cost alone might make sense.
- Identify suppliers whose values align with the values of your organization and consider writing them into your travel policy as preferred vendors.
- Begin a conversation with your travelers and stakeholders about what responsible spending looks like for your organization.
- If you have a TMC, talk to them about the status of their capacity and staffing. Will there be a ramp-up period for the TMC to start handling bookings once business returns? Where are they on tracking your potential refunds, fee waivers, and credit balances for canceled trips?

WE ARE ALL IN THIS TOGETHER

These are truly extraordinary times. We are sure to emerge from it changed by the experience. We hope that this checklist helps you frame up a few next steps with purpose, a degree of control, and a path to drive value for your organization in a way that outlasts today's challenges. With that, we are forgoing our usual call to action and simply want to say, from everyone at SAP Concur, we are here for you.

For more detail on making these checklist items a reality:

[Download the Executive Overview](#)

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SMB TRAVEL MANAGER CHECKLIST
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