SAP Concur C·

SAP Concur Case Study | EXTERNAL

Pima Community College Transforms Manual Processes to Digital Spend Management with SAP Concur

The college reduced costs, increased efficiency and improved compliance – all while making the process easier for its users

SAP®

Quick Facts

Institution Name
Pima Community College

Solutions

Expense Solutions:
- Concur® Expense
- Travel Request
- TripLink
- ExpenseIt
- Intelligence
- User Support Desk

Duty of Care Solutions:
- Locate
- Active Monitoring

Travel Solutions:
- Indirect with TMC

Invoice Solutions:
- Invoice Processing
- Invoice Capture
- Line Item Capture
- Intelligence
- Purchase Request
- Service Administration
- AppCenter Partner, Comdata

Industry
Higher Education

Institution Size
- 6 locations
- 2,701 total employees
- 44,109 credit and non-credit enrollment

Location
Tucson, Arizona, U.S.

Why SAP Concur & Pima Community College

Pima Community College leaders wanted a total employee-initiated spend management partner that understood higher education and had a configurable solution that would mobilize the entire employee spend process. SAP Concur delivered on all counts.

ABOUT PIMA COMMUNITY COLLEGE
Pima Community College is a two-year, open-enrollment institution, with six locations serving the greater Tucson metro area. Founded in 1966, Pima provides a variety of credit courses, award certifications and associates degree in myriad fields, as well as workforce development, career training and adult education classes.

PimaCommunityCollege

The Challenge: Transforming a Cumbersome, Manual T&E Process

Pima Community College is a hallmark of higher education, with six campuses, and a dedicated faculty serving the Tucson metro area. However, until 2015, its method for handling travel, expense and invoices was decidedly old school, ripe with paper-based, **highly manual processes** that frustrated faculty, staff, administrators and the AP department alike.

Travel approvals started with a paper authorization form that moved from supervisor, to campus business office for budgetary approval, to the district accounts payable team; where it was vetted for a third time and entered in the ERP.

The reimbursement process was equally cumbersome, involving up to 45 minutes of manual entry for each reimbursement. As a result, reimbursements were taking up to a month to process – even for "mileage only" requests from local travelers who drove from campus to campus.

Although Pima had a P-card program, there was no formal travel credit card program in place. So, instead of the college getting **much-needed rebates** from travel expenditures, staff and faculty members who could afford to front travel with their personal cards were accruing points.

"When you have limited resources, you have to do more with less – and that's hard to do with paper-based processes. So, we started looking for a more automated T&E solution that would give us the features and compliance management we needed – from a partner who **understood higher education**."

Isaac Abbs, Director of Enterprise Systems, Pima Community College
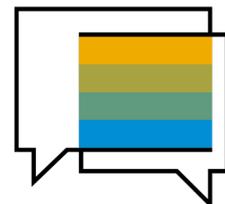
Abbs assembled a team from accounts payable, finance and the campus business offices to explore options. After the vetting process was complete, it came down to SAP Concur and the college's existing ERP vendor.

"Although our ERP vendor offered a fully integrated travel option, that convenience did not outweigh the additional features or configurability we would get with Concur," Abbs said. "We knew that we could leverage what another Concur customer had done to integrate with the same ERP, so we would not be starting the process from scratch."

To get funding for the SAP Concur initiative, the team, with Pima's CFO as their advocate, presented a business case with a significant projected return on investment to the college's Strategic Initiative Fund committee. The group cited improved staff efficiency, dollars saved and rebates gained by moving to a travel credit card. At the same time, they presented the soft benefits, like an improved, streamlined user experience and built-in compliance checks for infrequent and mileage travelers alike. These hard and soft benefits produced a projected ROI of 400% for Pima. In short, SAP Concur would allow staff to spend less time on managing reimbursements and more time **focused on serving students**.

A CALCULATED APPROACH IMPLEMENTATION

After funding was approved, the Pima team worked with SAP Concur to identify the most logical implementation plan. They started with Expense and P-card, and as they realized the value being brought to the college, they continued to add additional services to increase this value. They added duty of care, a corporate credit card program, a variety of travel components, including booking – and currently are going through the

implementation of Invoice to automate their vendor invoicing process. The goal? Maximize the value of the SAP Concur platform and deliver the projected ROI.

According to Abbs, that meant focusing on more than the technology alone. To be successful, he had to take a **holistic approach to implementation** that extended well beyond making sure the system "worked" at go live.

"Any major IT initiative involves a combination of people, processes and technology, all of which have to be addressed to be successful," Abbs explained. "With our implementation, we tried not to slam SAP Concur onto our existing processes. Instead, we fixed what was not working and aligned these more with best practices from hundreds of other implementation from the SAP Concur project team. Taking that approach was one big reason the implementation was such a success. We were not putting new technology on top of outdated or inefficient processes."

One of the big benefits of SAP Concur is that, although the software is setup to **industry best practices**, it's highly configurable. So, Abbs could tie that workflow to Pima's unique needs.

For example, if a traveler flies out of the Tucson airport, the college will reimburse $5 per day for parking. If a traveler flies out of the Phoenix airport, the reimbursement amount is $9 per day. If a traveler is seeking travel approval for a conference, he or she has to attach a conference agenda with the request. Abbs was able to set up all of these audit rules within the system, so SAP Concur automatically flags these and ensures compliance upfront.

"Concur gives us '**freedom in a framework**.' We've setup the system to manage compliance for us, based on our own unique rules. If a staff member skips a step, or enters a cost outside of policy, Concur prompts them to add the attachment, or lets them know how to document the overage."

Isaac Abbs, Director of Enterprise Systems, Pima Community College
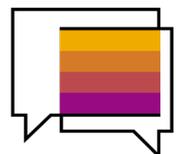
Driving Adoption in a Non-Mandate Culture

Of course, having the best technology in the world means nothing if the staff doesn't use it – a particularly high-risk in a non-mandate culture. That's why Abbs made the time to not only train users on SAP Concur, but more importantly, show them how the solutions would **make their lives better**.

First, Abbs brought in a variety of users to run a "blind taste test" of SAP Concur. He asked them to put in a trip without any instruction, so he could see who had trouble, where they got stuck and who could go through the process intuitively. From here, he gauged how to handle the training.

Ultimately, Abbs decided to go with a "train the trainer" approach, choosing and training individuals from the business office of each of Pima's six campuses. That meant there would be **experts at each location** to facilitate training, and provide ongoing face-to-face help, as needed. Abbs also got the staff excited about SAP Concur through a well-planned change management strategy with user benefits at the core.

"We talked about convenience, how they could take pictures of receipts with the mobile app and submit these electronically. We explained how reimbursements would be faster, and direct deposited into their accounts," Abbs said. "We explained how, with duty of care, we could reach out in case of emergency, and keep them safe."

At the end of the session, even those staff members who said they didn't use their personal cell phones for work were downloading the mobile application.

"They saw how much time we saved them, so they could **focus on their real jobs**, instead of managing paperwork," Abbs said.

The combination of focused training, on-site experts and a clear change management strategy paid off, with high adoption and an enthusiastic staff who clearly recognized SAP Concur's value from the beginning.

Delivering Real Benefits for the College and Users Alike

A SIMPLIFIED USER PROCESS

Instead of paper requests and reimbursements, Pima is now totally paperless. Travel requests seamlessly flow from staff through the approval process. Submissions and approvals can happen anywhere, using nothing more than a mobile device.

Audit rules are already in place to ensure compliance, however, for the infrequent traveler and in an effort to continuously leverage the full value of the system, SAP Concur will prompt them throught the request and reimbursement process so they no longer need to remember the policy.

"We will be setting up Concur to recognize users who have not traveled in a while and sending them reminder messages. Basically, these will say, 'We see you're going on a trip, don't forget to do these things,'" Abbs said. "That addition will be very helpful for people who travel once or twice a year."

Instead of sending packets of receipts, both travelers and P-card users can take pictures of these with their mobile camera – a huge timesaver for travelers and department heads alike.
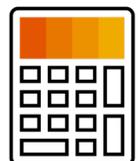
IMPROVED BACK OFFICE EFFICIENCY

Instead of coping with a barrage of paper, reimbursement requests flow directly to AP and into the ERP, without rekeying. That saves the AP staff upwards of 45 minutes to an hour in manual entry per request, so they can spend their time on more valuable projects.

With these streamlined processes, Pima processes reimbursements more quickly. Instead of waiting up to one month for a check, staff receive their reimbursements within one day of approval, through direct deposit. This new metric is particularly valuable to local travelers with regular mileage submissions.

ENHANCED DUTY OF CARE

Prior to SAP Concur, if a natural disaster or emergency occurred somewhere in the world, college officials had to comb through paper travel approvals to find out if any staff members had travelled to that area – a process that could take hours or days.

With SAP Concur, Abbs can pinpoint the location of every Pima traveler on a real-time, global map. The system also supports two-way communication, so he can instantly reach out to any staff members who could potentially be in danger, check their status and help them get safely back home.

REALIZING MEASURABLE RESULTS

Since implementing SAP Concur, Pima Community College has:

- Saved time for end users by automating the expense submission process
- Eliminated up to 45 minutes to an hour of manual entry per reimbursement
- Reduced reimbursement wait times from up to 1 month to 1 day after approval
- Decreased travel approval time from 14–16 days to 7–8 days, thus avoiding increases in airfare
- Gained rebates amounting to 1.5% of more than $2 million from corporate travel spend
- Achieved a projected ROI of 400%

A Change for the Better

A change of this magnitude, particularly in a resource constrained community college environment, is no small task. But, with the right partner, and a meticulous, well-planned approach to rollout, the move to SAP Concur was a slam dunk.

"I knew that the initiative was a success when some previously skeptical staff members stopped to personally thank me for saving them so much time with Concur," Abbs said. "The project has been a success in terms of value and returns to the college, but it also had a significant impact on the overall user experience."

Now that he's worked with SAP Concur and seen the solutions in action, what does Abbs think makes the technology and company stand out?

"It may sound cliché but Concur is a product and a company that *gets it*," Abbs said. "They **understand the higher education industry** and are doing everything to align their products with industry needs."

He's equally impressed by the solution's flexibility. "Concur is designed around best practices, but allows us to configure the solution with our own audit rules, policies and processes – so we can make Concur our own."

Combine those reasons with the features, visibility and automated compliance checks from the beginning of the T&E process, and you have the ultimate reason why Abbs is sold.

"Concur delivered the user experience and the results we wanted," Abbs said. "**It delivered on its promise.**"

COMPLIANCE

By moving compliance upfront in the T&E process, and automating audit rules in SAP Concur, Pima reduced compliance violations and increased policy adherence in a non-mandate environment.
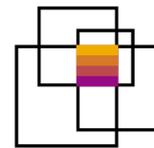
CONFIGURABILITY

Though based on best practice work-flow, Pima could configure SAP Concur with its own rules, parameters and messsages. The system adapted to the college's new processes, instead of the other way around.

INDUSTRY EXPERTISE

Higher education has fewer resources, more governance and more infrequent travelers than business environments. By working with a T&E provider with deeper knowledge of the space, institutions gain better outcomes.

ABOUT SAP CONCUR

SAP Concur imagines the way the world should work, offering cloud-based services that make it simple to manage travel and expenses. By connecting data, applications and people, SAP Concur delivers an effortless experience and total transparency into spending wherever and whenever it happens. SAP Concur services adapt to individual employee preferences and scale to meet the needs of companies from small to large, so they can focus on what matters most.