Concur Implementation

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In the beginning.....

- 4 campuses
- 4 travel policies
- Paper submission of expenses
- Two to four week turn around time
- Existing online booking tool
Budget Response Team

• Committee formed to decrease spend
• Redesign of travel policy
• U-wide consistency
• Recommendation to purchase Concur
Implementation

• Three-legged stool concept
  – Policy
  – Concur request, expense, and approvals
  – Travel office
Policy

- Committee formed
- U-wide consistency
- Road Show to present
- Multiple revisions
- Approval from Chief Business Officers
Concur

• Testing
• Creation of over 80 reference guides
• 25 Tip sheets
• 7 eLearning Tutorials
• 150+ training sessions for
  – Delegates
  – Travelers
  – Campus trainers
Travel Office

The missing leg of the stool
- Travel process
- Guidance
- Policy questions
- Contract negotiations
- Collaborative efforts with accounts payable, reconciliation teams and procurement
Growing Pains

- Change Management
- Lack of involvement
- Resistors
- Confusion (Concur and TMC)
Lessons Learned

• Slow and Steady
• Mandate training
• Stories of success
• Consistency is lacking
• We don’t know what we don’t know
Questions