



SAP Concur 

SAP Concur Barclays Case Study | PUBLIC

## **Barclays** Gains Access to Integrated Travel & Expense Data with SAP Concur Solutions

One Global Travel and Expense Policy Improves Compliance and Provides a Full View of Travel Spend

# Quick Facts

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## Company Name

Barclays®, plc

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## Solutions

- Client Web Services
- Concur® Request
- Expenselt®
- Intelligence
- Policy Audit
- Service Administration Elite
- Concur® Travel
- Concur® Expense
- Concur® Triplink
- User Support Desk

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## Industry

Finance

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## Company Size

85,000 employees worldwide

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## Location

London, UK

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## Why SAP Concur?

Barclays wanted to create one global travel & expense policy with data visibility across an integrated system. With the help of SAP® Concur® solutions the company established a unified policy aligned with simplified expense types, strengthening audit and control processes, and ensuring consistent data across the organization.

## ABOUT BARCLAYS

Barclays moves, lends, invests, and protects money for customers and clients worldwide.

Headquartered in London, England, Barclays is a consumer, corporate, and investment bank, and one of the world's largest and most respected financial institutions, with a heritage of success, quality, and innovation stretching back over 325 years. Operating in 50 countries and employing around 85,000 people across the globe, it helps millions of communities, millions of individuals, and millions of businesses thrive.



# The Challenge: Unify Barclays Global Travel and Expense Policies

Barclays is an organization dedicated to creating opportunities. To achieve that mission, the London-based financial institution moves, lends, invests, and protects money for customers worldwide. With offices around the world, Barclays found itself with numerous local travel and expense policies and faced a growing number of expense types across two legacy systems. Barclays turned to SAP Concur solutions to help it implement an integrated travel and expense system, simplify its expense types, and improve data visibility.

## **BUILT TO PURPOSE, FROM DAY ONE**

Migrating Barclay's 85,000 travel and expense users required participation from across the organization and around the globe. The first step to implementing Concur Travel & Expense was convening a stakeholder working group to ensure the travel and expense organization was meeting the needs of employees.

Made up of representatives from Technology, Compliance, Tax, HR, and Finance as well as from end user groups across the organization, working groups were essential to ensure SAP Concur solutions were fit for Barclays purposes from day one. The group worked to finalize and define expense types, identify needs for customized interfaces, and members from the compliance team ensured the gift and entertainment policies were aligned with regulations in relevant markets.

Beyond the implementation process, the working groups assisted with change management across the organization, opening lines of communication, encouraging adoption, and acting as champions for the new global T&E policy.

## **DEFINING EXPENSES, GAINING VISIBILITY**

Working closely with the Chief Controls Office to define expense types and identify gaps and overlap in existing policies, the Barclays team ultimately rolled out one global policy. And, with fewer than 80 expense types, Barclays achieved total alignment between its expense categories and this new global T&E policy.

Along with alignment across the globe and a greatly simplified number of expense types, Barclays used Concur® Expense to improve the employee experience of entering expense reports. By grouping expense types into simple to understand categories Barclays was able to reduce miscategorized expenses. For example, when expensing air travel users are presented a dropdown menu with associated costs such as baggage fees or onboard Wi-Fi.

Not only is it easier to enter expenses, but every expense type is addressed in a corresponding section of the T&E policy, allowing employees to quickly and easily code expenses appropriately reducing the number of rejected expenses and saving time throughout the approval process.

Of course, the rollout has not been without growing pains. After seeing a high volume of expense claims, Barclays is considering limiting the number of claims an employee can submit each month to better manage its transaction volume.

In addition, Barclays encountered challenges ensuring product features were integrated across its solutions. While Barclays is still working to customise service support, after adopting Preferred Care, education around product releases improved.

### **SIMPLIFYING EXPENSES AROUND THE GLOBE**

With a goal of gaining spend visibility across countries, simplifying expense types, and consolidating its global travel & expense policy, Barclays continues to roll out SAP Concur solutions in its largest markets.

With SAP Concur solutions, Barclays now has access to clean, consistent data and with this integrated view of end-to-end travel spend, can save money in future supplier negotiations and make smarter budgeting decisions.

And, with Preferred Care, Barclays has ongoing personalized support, access to technical knowledge, and a solution to ensure product integration goes smoothly so Barclays' employees can continue creating opportunities for employees around the globe.

### **ABOUT SAP CONCUR**

SAP® Concur® is the world's leading brand for integrated travel, expense, and invoice management solutions, driven by a relentless pursuit to simplify and automate these everyday processes. The top-rated SAP Concur mobile app guides employees through every trip, charges are effortlessly populated into expense reports, and invoice approvals are automated. By integrating near real-time data and using AI to audit 100% of transactions, businesses can see exactly what they're spending without worrying about blind spots in the budget. SAP Concur solutions eliminate yesterday's tedious tasks, make today's work easier, and help businesses run at their best every day. Learn more at [concur.com](https://concur.com) or at the SAP Concur [blog](#).

### **EXPENSE EFFICIENCY**

Travelers can capture receipts and submit expense requests electronically, from their mobile devices. Everything flows through the approval and reimbursement process with time to spare.

### **100% AUDIT**

Policy Audit—providing 100% audit capability—has helped train employees to use the correct expense types and mapping each audit question to the relevant T&E policy clause helps manage policy compliance.

### **UNDERSTANDABLE EXPENSES**

Clearly defined expense types and a strong audit process not only support control and compliance efforts but also provide Barclays accurate, timely data.

### **TOTAL VISIBILITY**

The Travel and Expense department had full visibility into all expenses, providing data for negotiations in annual RFPs.

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