SAP Concur C·

The Transformation of Fulton County Schools:
From Paper-based to Efficient, End-to-End Expense Management

In Partnership With

Genesis CONSULTING
VALUE DRIVEN. PERFORMANCE FOCUSED.

SAP

Quick Facts

Partner Company Name

Genesis Consulting

Designation

Service Partner
Reseller

Designation

Service Partner
Reseller

Client Name

Fulton County Schools

Client Industry

Higher Education K-12

Solutions

- Concur® Expense
- Concur® Request
- SAP ICS Connector

Every day, Fulton County Schools (FCS) make a positive impact. It's the fourth largest school district in Georgia, with 6,900 teachers and nearly 11,000 full-time staff dedicated to giving 89,000 K-12 students the education they need to succeed in the classroom, and beyond.

Although the school system earned high marks for academic excellence, its home-grown system for travel requests and expense reimbursements was failing to deliver the efficiencies and transparency it needed.

Travel requests were handled via SharePoint, which was functional, but cumbersome. Travelers had to manually calculate anticipated spend, enter the appropriate cost center for the type of travel requested, then send the requests out for approval, with no visibility into where these requests were in the process. There were no automated workflows to route trips requiring grant money, special billing or out-of-state travel to appropriate person or board for approval, often resulting in delays.

Expense reports were created on spreadsheets and manually routed with paper receipts, which was time consuming for traveler and processor alike. Reports could get lost, receipts were often missing, and there was no automated way to compare the actual spend to the requested amount. Because nothing was integrated into the financial system, expenses were challenging to audit, and had to be manually input into the accounting system at month-end close.

> "Our staff was spending too much time and effort tracking, filing and putting away paper. It wasn't efficient, and it didn't give us the transparency we needed to quickly respond to open records requests. We needed a paperless environment where all the information would be at our fingertips."
>
> Suzanne Hatfield, Executive Director of Fulton County Schools

FROM PAPER PAINS TO EFFICIENCY GAINS

To give Genesis a clear picture of the current environment, school leaders, working with the internal IT department, put together a list of 27 different pain points they wanted to eliminate in the existing travel request and expense processes. At the time, the Genesis Consulting team was already in the discovery stage of a large, ERP and payroll system transformation for FCS, so they were familiar with the disparity of the environment and some of the challenges.

"After we completed our assessment, we determined that all the pain points Fulton County needed to address was readily available in (SAP) Concur, either out of the box or by way of configuration," explained Mark Block, SAP Concur Delivery Lead at Genesis Consulting. "Implementing the solution as part of the larger initiative would standardize and simplify FCS' expense-related processes—reducing data entry, accounting classifications and, with the ERP and payroll system integration, create a seamless, end-to-end workflow."

With SAP Concur's automated tools, travel requests and expense reports could be created online or on a mobile device, making the processes more convenient for the user.

"We could configure the tool to allow users to select the funding source for the travel, such as state grants, federal grants or local funds to meet the audit requirements of a public funded entity, and automatically route these to the appropriate grant manager or board after manager approval," Block explained.

In addition, finance leaders would gain more visibility for better oversight, while automated controls would reduce errors and ensure compliance on the front end.

"We worked very hard with the Genesis team to create audit rules in the system. So, if someone fills out an expense report incorrectly, or includes an unallowable expenditure, it immediately gets pushed back to them," Hatfield explained. "The goal was to add enough rules to make an impact but not so many that they bog down the user or the system. Genesis' expertise working with schools like ours was really a big help with that."

Just as important, if an open records request comes in for travel data for a specific traveler or date, that information is now just a few clicks away. No more digging through boxes in warehouses. The paper chase, on multiple levels, is eliminated once and for all.

A MASTER CLASS IN CHANGE MANAGEMENT

Once FCS decided on SAP Concur, the next step was preparing and orchestrating the change.

"Any time you are doing a major integration upgrade or process change, there is bound to be pushback; people who want to keep doing things the way they've always done them," Block explained. "That's where Suzanne Hatfield's experience with SAP solutions in her prior positions was so beneficial. She had the first-hand knowledge to connect her staff with what the product could do. That helped shift the mindset from holding onto the past to start thinking of what could be in the future."

The transition team also developed a comprehensive communications and training plan to get everyone who would be using the new solution ready for, and enthusiastic about the change, well before the January 2022 go live.

"We started sending out emails, newsletters and having meetings to let everyone know what's coming, during the summer of July 2021, when the schools started ramping back up," Hatfield said. "We continued talking about it all through the fall, so everyone knew, as of January, we wouldn't be taking paper expense reports or using SharePoint for travel pre-approvals."

The emails began monthly, then increased to weekly in the months before the transition.

"We have over 14,000 employees and about 10 percent of those travel, so, it was quite an endeavor," Hatfield said.

"Mark (Block) was right with us every step of the way, making sure we had the right amount of training, and we had staff who could step people through the new processes. The tools are so easy to use that everyone learned very quickly."

In addition, the Genesis team put together online resources that new users could access to get help or find answers on their own, which often eliminated the need for them to contact the support desk.

All that planning paid off.

"It was the smoothest transition we had," Hatfield said. "Once everyone was onboard the paperless bandwagon, it was a game changer."

The fact that the implementation began at the onset of the COVID-19 pandemic lockdown, in parallel with the school system's larger transformation, compounded the victory.

"It's a testament to everyone involved that we got this project done during all of the disruptions of the pandemic, without any in-person meetings," Hatfield said. "To me, that was just incredible."

GRADUATING TO A TRANSFORMED ENVIRONMENT—AND SEEING THE RESULTS

Getting the new solution in place is one thing. The true test is in the metrics—the return on the investment. By anyone's standards, Fulton County School's results earn a solid A+.

Trip request approval cycle times were reduced from an average of five days to two. That speed has a ripple effect on budget, as it enables faculty and staff to book trips earlier, and gives school administrators a clearer picture of projected expenditures versus actual spend.

Expense reimbursement cycle times decreased from seven days to three days. Instead of using spreadsheets and physically attaching paper receipts, expense reports can now be generated, submitted and approved using nothing more than a mobile device. Not only is the operation more efficient but, by setting up audit rules to ensure that each expense report is complete and adheres to certain criteria before submission, the school system also reduced the opportunity for errors and noncompliance.

Report generation that previously took as many as 200 hours a month was reduced to less than one hour per month. In the past, generating financial reports required personnel to pull data from multiple systems. Now that everything is integrated, Fulton County Schools can leverage Cognos, the reporting tool within Concur, to generate these reports automatically.

The time spent posting travel, posting financials, and loading expenses into payroll went from 180 hours a month to just two hours a month. Instead of multiple disparate systems, and the need to post entries from one to the next, everything moves seamlessly through an end-to-end process.

"(SAP) Concur has proven to be a high-value solution for return on investment for this and other K-12 implementations we have done," said Nick Coticchia, COO and Managing Partner of Genesis Consulting. "Because Concur Expense and Concur Request can be integrated with most ERPs, are intuitive, and can be implemented relatively quickly, school districts can implement these solutions, and start seeing the ROI quickly, while they're waiting for the ERP. It's an easy win."

With a transformed environment in place, Fulton County Schools is positioned for the future, with spend visibility and an end-to-end workflow that continues to deliver value. As a result, it has more time and resources to spend on what the school system does best: educating young minds and helping them succeed.

SAP Concur ⦿

ABOUT SAP CONCUR

SAP Concur is the world's leading brand for integrated travel, expense, and invoice management. Driven by a relentless pursuit to simplify and automate everyday processes, the solutions guide employees through business trips, move authorized charges directly into expense reports, and automate invoice approvals. By integrating near real-time data and using AI to analyze transactions, businesses can see what they're spending, improve compliance, and avoid possible blind spots in the budget. SAP Concur is imagining a world where travel and expenses practically manage themselves, helping businesses run at their best every day.

Learn more at concur.com/public-sector-k-12 or at the SAP Concur blog

SAP Concur Partner

Genesis Consulting is a systems integration and enterprise agile consulting firm, focused on delivering SAP solutions, enterprise agile consulting, management consulting, training, coaching, and digital transformation services. Our innovative approach to implementing SAP with Lean principles and Agile techniques has helped our clients deliver their SAP solutions to their stakeholders quicker, increase the productivity of their teams, and increase the quality of their solutions. As a SWaM certified small business headquartered in Richmond, VA, with offices in Reston, VA, Washington, D.C., and São Paulo, Brazil, Genesis Consulting provides world-class SAP services and innovations to customers around the globe.

SAP