SAP Concur

SAP Concur Case Study | EXTERNAL
Concur Expense | Concur Invoice

A Valuable Lesson

Going Paperless at KIPP Bay Area Schools Gives the Accounting Team Capacity for Growth

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Quick Facts

Company Name

KIPP Bay Area Schools

Solutions

- SAP Concur® Expense
- SAP Concur® Invoice

Industry

Education

Company Size

300

Location

Northern California

Why SAP & KIPP?

KIPP Bay Area Schools needed an expense and invoice management solution to keep up with their growth plans. They chose SAP Concur, because it offered:

- An efficient solution that delivered immediate value and could scale with the school's growth
- Automation tools that cut complexity and time out of the process and boosted AP productivity
- Mobile apps and tools employees wanted to use

KIPP Bay Area Schools

About KIPP Bay Area Schools

The mission of KIPP Bay Area Schools is to operate high-achieving public schools in educationally underserved communities, developing in our students the knowledge, skills and character essential to thrive in college, shape their futures, and positively impact the world.

There are currently 12 KIPP schools in the Bay Area. In these schools, over 5,200 students are being prepared for success in college and the competitive world beyond. These tuition-free, public charter schools are located in the educationally underserved neighborhoods of Oakland, San Francisco, San Lorenzo, San Jose, Redwood City, and East Palo Alto.

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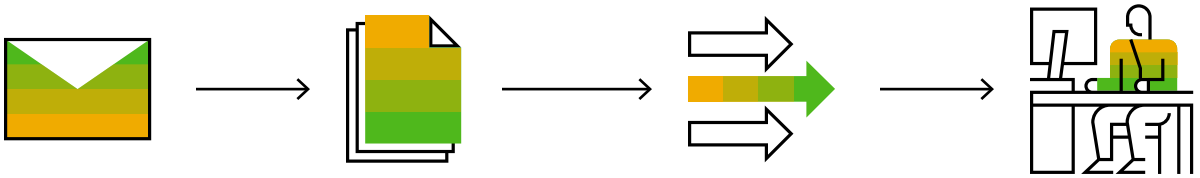
A Focus On Growth

Back in 2013, KIPP educated about 3,000 students across eight public charter schools in the San Francisco Bay Area. The goal, however, was to grow to 20 schools—a fact that quite frankly worried the accounting team.

At the time, the school's AP functions, corporate credit card program, vendor invoice management and expense reimbursement systems were entirely paper based. The accounting team manually logged virtually all non-personnel expenses. And the office was lined with rows of file cabinets equally crammed with paper invoices and expense reports.

Invoice processes were time intensive, error prone and void of transparency.

KIPP's manual process took man-hours away from more pressing matters, and it also meant mistakes. Take a look.



Vendors would send paper invoices to the schools.

The invoices would invariably end up in one stack of paper or another.

Once located, the invoices would be delivered by courier to the home office.

At the home office, the information would be logged manually into the system.

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Best Practices Any Organization Could Learn From

Sometimes, spending more saves more.

For KIPP, the cost of SAP Concur is roughly the same as one accounting associate. But this could this could help them avoid hiring two FTEs in the future—and that's an ROI leadership looks for.

Paperless processes drastically simplify the audit process.

Under the old system, the school kept on-site paper records for all its expense transactions. Auditors requested samples of records for review, and two teams spent two full days pulling and refiling records. By going paperless, KIPP no longer has to maintain paper records, and the audit team goes directly into Concur for samples of expense transactions.

Train, train, train, and give people time to adjust.

Instead of seeking to train users individually, the accounting team provided school Operations Managers with videos and other materials to educate school staff on the new systems. The accounting team also communicated very clear deadlines, with long lead times, largely mitigating any organizational resistance.

SIMPLIFYING REIMBURSEMENT:

- The ExpenseIt mobile app now allows staff members to take photos of receipts, which are automatically uploaded to Concur for coding
- Expense reports are created electronically and take much less time to complete
- All approvals are electronic and any problems are resolved electronically, not manually
- All reimbursements are done via ACH direct deposit, versus cutting manual checks

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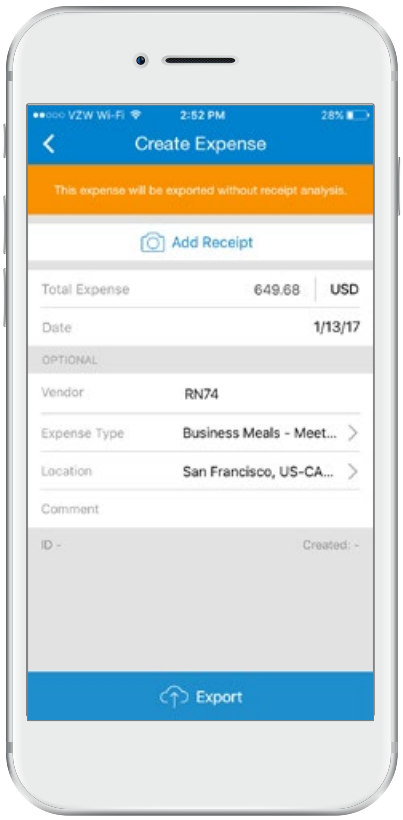
Mobile Apps and Other Tools Help KIPP Staff Be Productive



Reimbursement and corporate credit card processes were also positively impacted by the switch to Concur. Before, employees had to fill out a complex expense reimbursement report, then number, annotate and tape their receipts to the report. It was an onerous process for the employee, cumbersome for the accounting staff, and time consuming for both.

Faster, easier, and in every way, **smarter**.

Concur was simply the smartest way to prepare for massive growth. And with 12 schools now in operation, and plans to grow to 20 over the next 4 years, the paperless, scalable system is the only way to easily stay on top of the entire spend management platform—spanning AP, credit cards and employee expense.

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.

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