SAP Concur ▣

SAP Concur Case Study

Concur Expense | Concur Invoice | Concur Locate | Consultative Intelligence

Automation Helped Gonzaga University Seamlessly Pivot to a Remote Work Environment

As a result of the spread of COVID-19, Gonzaga University had to move fast to bring students and faculty abroad home, and transition to working remotely.

THE BEST RUN **SAP**

Quick Facts

Institution Name

Gonzaga University

Solutions

– Concur® Detect by AppZen
– Concur® Expense
– Concur® Invoice
– Concur® Locate
– Concur® Request
– Consultative Intelligence
– ExpenseIt
– Invoice Capture
– Invoice Pay
– Purchase Request
– Service Administration

Industry

Higher Education

Institution Size

1,200 faculty and staff

Location

Spokane, WA

Why SAP Concur?

Gonzaga University is a global institution, and previously had a manual expense and invoice process that was cumbersome, provided no transparency, was paper-heavy, and required physical signatures. The University knew they needed to streamline its accounts payable processes in order to gain insight to spend data to inform critical decisions that was previously impossible with a paper-process. Having automated tools in place allowed the finance team to be more efficient, provide reporting and transparency to senior leadership, and allowed the University to be agile and nimble in responding to crises and transition to working remote.

ABOUT GONZAGA UNIVERSITY

Founded in 1887, Gonzaga has a liberal arts tradition that integrates philosophy, religious studies, mathematics, literature, natural and social sciences, and writing that is grounded in its Catholic, Jesuit roots. Opening intellectual and cultural perspectives while producing exceptional graduates who lead with purpose—the University serves as a hub for students and professors, friends and fans, international scholars and local neighbors, who come together to learn from, support, and worship with one another. Gonzaga's story has always been one of community.

# The Challenge: Automating Finance Processes and Transitioning to Remote Work During a Crisis

Gonzaga University previously had a manual process that was incredibly cumbersome, provided no transparency, was paper-heavy, and required physical signatures.

"We knew we needed to streamline our processs and acutally be able to get our arms around the data that we knew existed, but we couldn't get our arms around it, of course, using a paper process," shares Linda Wilson, Director of Finance Systems and Services at Gonzaga.

When Gonzaga first started exploring automated solutions to its manual, paper processes around travel, expense and invoicing—no one could've foreseen that their proactiveness would be instrumental in being able to continue business as usual during a pandemic, such as COVID-19. As a result of having automated solutions in place, Gonzaga was able to act instantly. The University created a task force to navigate through the process of sending faculty and staff home to work remotely, which included getting the IT support they needed to accomplish this—to ensure proper equipment and training was facilitated for a group of people that had never worked fully remote before.

"The easiest for us was, thank goodness, we had a system like SAP Concur where all the work really could be done remotely," says Wilson. "And there's nothing like a crisis to help provide senior leadership a look at where would we have been if we weren't able to do all of these processes remotely."

Wilson also expressed concerns for her peers in the higher education space in being able to adapt the way Gonzaga has been able to during this momentous time.
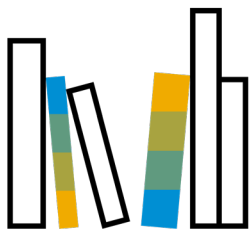
"I think it's just really important for you guys to understand that I'm sure other universities are figuring all of this out the hard way right now. I really don't know what we would have done during this pandemic without the tools that we are using through SAP Concur. I think some of the business might've come to a halt as far as reimbursements and sending invoices and paying invoices. Right now, I feel like we can handle anything because we've gone through the latest crisis and you guys must probably feel the same way—a lot of lessons learned, but things that will stick with us for a lifetime."

Linda Wilson, Director of Finance Systems and Services, Gonzaga University

Benefits Of Automating Accounts Payable

With a finance team that is used to being in a campus environment and having to suddenly transition to remote work—you can imagine the day-to-day challenges that would result from not having access to the office. However, due to Gonzaga having its accounts payable processes set up with automation, the finance team was not taxed with the hardship that would result from operating in a manual way.

"Our process in the finance office was a very smooth transition for us because everything we were doing was online," explains Wilson. "We had eliminated any paper processes and any physical approvals. It was the smoothest part of the entire transition—to be able to work remotely for all of our travel and expense processing, all of our invoice processing, and in capturing the data that we were able to provide our senior leadership. That was all very, very smooth because of SAP Concur."

Having automated tools in place allowed Gonzaga to be agile and nimble in responding to crises, especially with a pandemic such as COVID-19, where other organizations were suddenly faced with unorthodox travel and spend processes with traditional procurement channels subsequently becoming invalid.

"We were very quickly able to allow more visibility to our CFO, to all spend in both travel and expense and invoice," Wilson shares. "It also caught the attention of course of requesters and approvers—is this essential spend or is this not essential spend. So, it really helped us be able to navigate that very quickly and be able to configure the system so that our CFO and CFO office actually had much better visibility into spend at the time of COVID-19 and everyone sending our students home."

Access to Reporting with Near Real-Time Spend Data is More Urgent than Ever

For instituions like Gonzaga, accessing spend data and reporting with transparency on that spend is crucial—and why data integration is so important.

"Our senior leadership pays special attention to the data that we were able to give through SAP Concur reporting," says Wilson. "Our Consultative Intelligence specialist was able to tweak reports on a moment's notice for us as they added additional criteria that leadership wanted to be able to look at. It saved us hours and hours of having to tweak reports ourselves and allowed us to better serve our senior leadership."

Gaining access to near real-time data is essential, especially during times of crises when expense types become difficult to track.

"We were able to set up a piece of our general ledger that's called an activity code where we actually have COVID-19 as the activity code, and that way throughout any expense that we have in Concur, we can add that in conjunction with that," Wilson shares. "It tells us which were supplies for COVID and which were refunds for cancelled travel as a result of COVID. We're able to import all of that into SAP Concur and use it along with every single expense type we have in there."

BENEFITS OF WORKING WITH A DESIGNATED CONSULTATIVE INTELLIGENCE EXPERT:

- Receive proactive partnership that is grounded in reporting strategies that save time and uncover savings

- Maximize spend data with insights unique to an organization

- Solve difficult reporting challenges with expert assistance to tailor reports

- Gain insights to better inform business decisions with assistance on interpreting data

- Access support on reporting strategies as an organization grows

Reaction Time is Critical in Fulfilling Duty of Care

Gonzaga is a global institution, and as the COVID-19 pandemic began spreading, Gonzaga had to move fast to get their students studying abroad back home to the U.S. immediately.

"We have a campus in Florence, Italy and we had an entire class over there, a couple hundred students," explains Wilson. "But as you would have it, it was spring break over there, so they weren't even on our campus in Florence. They were all over Europe enjoying spring break. We had to work very quickly to notify all of those students and get them to come home directly from wherever they were in Europe, and not travel back to the Florence campus because the virus was spreading so quickly in Italy. We knew the Florence airport was going to close down, so we didn't want them to go back there and get stuck. We assisted in getting them back to their homes in the U.S. and our Florence faculty and staff actually went into their 'pensiones' and packed up all of their belongings and shipped them back to the States to the students. Having the visibility to where our students were and the ability to get ahold of them was extremely important and a real eye-opener for a lot of people."

Gonzaga also had faculty in Florence to consider. However, due to its managed travel program, the University knew exactly where all of their staff were. Faculty members that were not on spring break stayed and assisted to pack up everything to send home to the students in a timely manner and were able to get out of the country as well.

Integrated Travel Data Supports Duty of Care

With Italy being one of the early hotspots of the virus, reaction time was immensely critical to fulfill duty of care.

"I heard from a number of people—senior leadership and faculty—who were traveling right up until the very last minute who didn't realize that there was a pandemic going on," explains Wilson. "And all of a sudden, these travelers were getting alert messages about the risk. And our new Risk Director at Gonzaga loves everything that Concur Locate has to offer."

Additionally, Gonzaga had concerned parents of students to consider. Overcommunication in this type of situation is key—and having access to travel data allowed Gonzaga to proactively act upon and communicate on any concerns and assume control over duty of care obligations.

"The parents were very thankful that Gonzaga had been proactive, including naysayers in the beginning," Wilson says. "Some parents thought, 'Well, we wanted our students to study abroad and maybe you're reacting too quickly.' That quickly turned into, 'Thank you so much for getting our children home safely.' And they were very comfortable with the actions that we had taken."

Building Partnership and Trust through a Managed Travel Program

Higher education institutions traditionally have a non-mandate culture, making it challenging for many schools to implement a managed travel program. Wilson expressed that Gonzaga thought they would never be able to execute on a managed travel policy—but she and her team stayed persistent about the benefits of SAP Concur solutions and how it could help the University.

"I would suggest this to any other higher ed institution how we actually developed policy," Wilson shares. "It went through an approval process with senior leadership and the cabinet and the President, but then we took that policy and we actually posted it for feedback for approximately 30 or 60 days, and during that timeframe, we got a number of different responses."

Some of the feedback included a resistance to policies claiming that it wasn't aligned with Gonzaga's overall mission. Others brought up valuable insights that Wilson and team had not included or considered in the policy. Once they were able to demonstrate to faculty and staff members that not only did Wilson and team listen, but also incorporated their feedback into the proposed travel policy—they gained the trust and buy-in needed to move forward.

"Now, is the policy ever broken," asks Wilson? "Absolutely. It does happen. We always offer grace. It's kind of our opportunity to partner with those travelers to show them we do understand, but here's why we need you to be booking in the

program. When we express that 'we want to take better care of you,' we usually win them over. I've never had a second offense on any of our faculty or staff, so I feel really good about that. And when it comes to a crisis like we've just been through—everyone's on board. They get it now. It becomes very clear why a managed travel program is very important for duty of care purposes."

As a result of this pandemic, Gonzaga continues to evolve their policies moving forward.

"We see this as an opportunity to add some really good information to our international travel policy that we think should have been there in the beginning, but it takes a kind of crisis to bring it to light," Wilson says. "I know that we'll be editing and adding to our international travel policy. I think it also brought to light the continual need for training and communicating with all of our travelers. If you only travel once a year, then it's a whole different story than if you're a road warrior on the road all the time. So, I just think we need to be doing more frequent training around policy, why we have the policy, and how they benefit from these policies."

Furthermore, with higher education institutions being a pivotal focus for SAP Concur, the partnership and trust between Gonzaga and SAP Concur is extremely valuable.

"I think hands down the most important thing that allowed us to develop a really good partnership and a deeper trust was a couple of years ago when we had a misstep in implementing one of the

Concur tools and Concur really stepped up to the plate and recognized that they needed a new plan and strategy in order for us to implement this tool successfully," explains Wilson. "And that's exactly what they did. It pretty much saved the day. And it was really pivotal in the relationship. It was a huge trust builder, and we've enjoyed a really close relationship with everyone that we're involved with at SAP Concur."

SAP Concur strives for partnerships with customers and the foundation of any good partnership is trust.

"In mid-March at the beginning of COVID-19, we were able to identify our travelers and we were able to bring them home," concludes Wilson. "We were able to transition our staff to work remotely, provide a seamless business continuity—and it dawned on our team that we would never have been able to do that without having the tools that we have from SAP Concur."

ABOUT SAP CONCUR

SAP® Concur® solutions simplify expense, travel, and invoice management for greater visibility and control. For more than 20 years, these leading, innovative solutions have kept customers a step ahead by delivering time-
saving tools, connected spending data, and a dynamic ecosystem of diverse partners and apps. User-friendly and business-ready, SAP Concur solutions unlock powerful insights that help businesses reduce complexity and see spending clearly, so they can manage it proactively. For more information, visit concur.com.

AP AUTOMATION

Automation of travel, expense and invoice processes allows Gonzaga's finance team to be flexible and nimble, and get the visibility to provide senior leadership with near real-time spend data from across the institution.

DUTY OF CARE

Gonzaga is a global institution, and as a result of its proactiveness in automating travel and expense, the University was able to act instantly during a pandemic to bring students studying abroad home and ensure the safety of abroad faculty and staff.

PARTNERSHIP AND TRUST

Since the start of COVID-19 spreading, Gonzaga was able to identify travelers to fulfill duty of care; transition its entire staff to work remotely; and provide seamless business continuity due to the SAP Concur solutions in place.