



SAP Concur Case Study

Concur Expense | Expenselt | P-Card Financial Integrator

## **Southeastern University Takes a New Approach to Its P-Card Program with SAP Concur**

With staff resources at a premium, the University uses Concur financial integrators to automate purchasing card administration and oversight.

# Quick Facts

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## Institution Name

Southeastern University

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## Solutions

- Concur® Expense
- P-Card Financial Integrator
- Expenselt®
- User Support Desk

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## Industry

Higher Education

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## Institution Size

- 140 extension campuses
- 700 faculty members
- 2,600 students in extension campus model
- 10,000 total students (onsite, in extension campuses and online)
- 240 P-card users

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## Location

Lakeland, Florida

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## Why SAP Concur & Southeastern University

Like many smaller colleges and universities, Southeastern University (SEU) operates lean, without the extra personnel or resources to devote to purchasing card management (P-cards) full time. By utilizing SAP® Concur® solutions with its P-card program, the institution can automate end-to-end processes – capturing transactions, routing these through the designated approval and audit workflows, then posting the transactions to back-office systems when the audit is complete. The solution provides a more streamlined, easier-to-use interface for users, while giving their finance team greater visibility into spend.

## ABOUT SOUTHEASTERN UNIVERSITY

Southeastern University (SEU) is a private, Christian, liberal arts college, associated with the Assemblies of God, offering more than 70 undergraduate and graduate degree programs in its Lakeland, Florida campus, as well as through its 140 extension sites and online program. Since its founding in 1935, SEU has been committed to equipping the next generation of servant leaders through its Christ-based environment, enabling them to not only get an education, but to discover their true callings.

SOUTHEASTERN  
UNIVERSITY

# The Challenge: Effective P-Card Management with a Limited Staff and Budget

Southeastern University (SEU) is a small, private, Christ-centered university with a big mission – equipping the next generation to thrive in their careers and their communities.

In addition to its traditional Lakeland, Florida campus and online programs, SEU, along with several church networks nationwide, offers an innovative, remote campus model that makes college accessible and affordable for more students.

The churches provide the campus space – facilities that are largely unoccupied Monday through Friday. SEU provides the faculty, curriculum and administration. In five years, SEU extension sites have grown to 140 locations nationwide, with plans to expand internationally. Through this program, 2,600 students are well on their ways to earning college degrees, without going any further than their local church, for less than \$9,000 per year.

Although the organization is big on innovation, like most smaller colleges and universities, it operates with a very lean finance and accounting staff. Budgets are largely allocated to student-focused initiatives, not adding headcount to back-office processes.

So, it comes as no surprise that, in the two years Mark Biddinger had been the Senior Director of Finance and Treasury for SEU, he hadn't closely scrutinized the school's P-card program. He knew there had to be an easier way to manage it, but with the process changes needed to support the new extension site model, and other initiatives, P-cards were put on the back burner.



“Smaller Christian universities are constrained by both time and money. We just don't have the budget of larger research universities, so we have to prioritize. With a P-card program, the biggest pain point is the administrative burden it places on a small accounting staff that doesn't have the resources to spare. We couldn't devote a full-time person to manage the process or enforce policy compliance.”

Mark Biddinger, Senior Director of Finance and Treasury, Southeastern University

SEU had two different P-card programs, managed by different vendors to keep them separated – both in place before Biddinger joined the university.

“We used American Express and SAP Concur for our leadership team’s program, which included anyone at the VP level or up,” Biddinger explained. “Everyone else’s P-card was managed through a different vendor.”

Although Biddinger was planning on reviewing the programs in the coming year or so, there was no real urgency to change – until a vendor forced his hand.

## **LESSONS LEARNED FROM THE SCHOOL OF HARD KNOCKS**

“In September of 2018, we got a call from the second vendor and were told that they weren’t going to host our P-card program anymore; that we had 30 days to find a new provider,” Biddinger said. “That left us scrambling.”

He contacted his American Express representative and told him what he was up against.

“Because we already had a P-card program in place for our leadership team with American Express, we were immediately able to expand it to the entire campus, which also brought in Concur,” Biddinger said.

He got the program in place but, not that effectively.

“At the time, I didn’t understand all of the structure Concur could offer, or its capabilities,” Biddinger said.

“So, we didn’t do the proper training, or public relations. We didn’t get it out to our staff and explain how you use

it, and all of Concur’s benefits. It’s much more streamlined and much easier to use than what we had before.”

Now, one year later, Biddinger and his executive administrative assistant are taking a giant step back, peeling the program apart, and preparing for a relaunch, and a revitalized P-card program.

“We’re looking at our policies and procedures, restructuring our communication and retraining our staff,” Biddinger said. “We’re finally getting an effective foothold into Concur and everything it can do for us.”

For example, SEU logs between \$4 million and \$5 million per year on P-card spend, the majority of which comes from a line item called “retail.” Biddinger would like to dissect and better manage that spend category for policy compliance and opportunities for vendor negotiations to reduce costs on frequently purchased items.

“We used to coax people to adhere to our policy. Now, we can cut off P-card access for non-compliance,” Biddinger said. “Once we started clarifying some of those rules, and actively managing it, most everyone jumped on board with it.”

Even with a few small changes in place, Biddinger and team are seeing a big difference – and look forward to improving from here.

“Although we haven’t fully adopted all of Concur’s features yet, the features we are using have already made our lives easier. We’re also learning how to run some of the reports to better manage our expenses.”

Mark Biddinger, Senior Director of Finance and Treasury, Southeastern University



# Alleviating the Pain Points

The more Biddinger learns about SAP Concur, the more potential he sees to eliminate his pain points and improve visibility into P-card spend.

For example, getting the information from SAP Concur to his general ledger is currently a two-step process.

“I pay the statements as is when they’re due. But the employee doesn’t have to allocate the expense until several days later,” Biddinger said. “So, I pay the statements, book a journal entry manually that says ‘P-card expense’ and the dollar amount. Then, once everything is allocated, typically to four or five general ledger account numbers, I batch that expense report and close it out through Concur. Then, I reverse the first entry I made, and post the second entry, which now allocates on the general ledger, so the employee can see how it impacts his or her budget.”

Instead of this time-consuming, highly manual process of downloading data to Excel, manipulating that information than uploading it into the ERP, Biddinger is working with SAP Concur to integrate their solution with SEU’s ERP, so everything syncs automatically. “That integrated workflow will save us several hours a month,” Biddinger said.

He’d eventually like to bring on a P-card administrator to handle the nuts and bolts of the program – managing spending limits, issuing replacement cards, and dealing with any questions, in addition to helping him uncover new ways to maximize SAP Concur’s capabilities.

The more Biddinger can simplify, the better.

“In all the P-card programs that I’ve seen, Concur has the potential to streamline and simplify the process for us. I love that – we need that,” he said. “My wife actually uses Concur with her company, so I see all the potential. If we could start using it as well as her company does, I’d be thrilled. It could make a big impact.”



# Taking Advantage of Global Business Travel

Biddinger is also looking forward to implementing American Express Global Business Travel through SAP Concur to more closely align employee travel with policies and gain leverage to negotiate preferred rates with various travel vendors.

“I think Global Business Travel may be the unsung hero of Concur,” he said. “I personally use it, and it would enable us to guide users to certain car rental companies or hotel chains where we use the data we collect to negotiate preferred rates. I think we will realize some quantifiable savings after we roll it out.”

His challenge is changing his users’ mindsets—a common issue for colleges and universities with a largely non-mandate culture.

“We’ve always gone on the premise of giving our users ‘maximum freedom, maximum accountability,’” Biddinger explained. “With that culture, we’ve been hesitant to implement a centralized process, or mandates that gives them only one method of getting something done. People want to feel like they can choose

their own lodging, air carrier or rental car company, so that will be the challenge.”

Biddinger plans to start by using Global Business Travel to more closely monitor any airfares that are beyond the normal pricing threshold, as well as adding other internal controls. As he collects more data, he will begin to change behaviors, moving P-card users to a mindset of efficiency and cost savings.

“Eventually, I’d like to get us to a more centralized approach, but that’s not going to happen overnight,” he said. “But, now we have a way to better monitor use and get a more comprehensive view of our travel spend and our retail spend. That’s the starting point.”

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## PARTNERS WITH IMPACT

American Express’ Global Business Travel solution with SAP Concur financial integrators enables universities to:

- Reduce spend through improved policy compliance and taking advantage of pre-negotiated discounts.
- Streamline the booking and reporting process.
- Move users, even in non-mandate environments, to a compliance mindset.



## HINDSIGHT IS 20/20

Although, at the time, Biddinger had few options but to get a replacement P-card program in place quickly, his lessons learned could help other smaller, resource-strapped institutions make a smoother transition. Here's how he'd do it differently:

### FULLY UNDERSTAND SAP CONCUR'S CAPABILITIES

It's important to take a close look at how SAP Concur could improve the P-card process from a compliance, policy adherence and visibility aspect, to determine how the solution can address these pain points. What do you want to track that you can't track now? How can it streamline processes for the back office and the users? How can it integrate with the ERP?

### START CHANGE MANAGEMENT EARLY

"I would roll out a 90-day transition plan, introducing the software to employees, telling them how it worked, and how it will make their lives easier," Biddinger said. "I'd set up small group, face-to-face meetings, so everyone understands what's coming, and what will change."

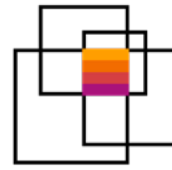
Then, he'd set up in-depth training closer to the actual launch date.

### INTRODUCE UPDATED TRAVEL POLICY WITH THE P-CARD/SAP CONCUR ROLLOUT

"I recommend revising travel and other spend-related policies with the Concur rollout, including adding some prohibitive transactions—things that were difficult to monitor before," Biddinger said. "If one of the big benefits of a P-card program with Concur is the ability to better monitor policy compliance, I think it's important for people to understand what that policy is."

Now that the initial P-card scramble is behind him, Biddinger is looking to the future.

"I am looking forward to maturing with our use of Concur. I want to create a campus culture that completely embraces it, with revised policies that are easy to understand, follow and comply with," he said. "With Concur, we have the tools to take care of a lot of our pain points. I believe our story will continue to evolve from here."



#### AUTOMATE

Automate the P-card process from employee purchase to the general ledger.



#### MANAGE

Manage multiple P-card programs/policies simultaneously, based on user.



#### AUDIT

Create your own approval and audit workflow for effective compliance management.



#### VISIBILITY

Gain visibility into the expense process from start to finish, and a more comprehensive view of your spend.

## 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.

Learn more at [concur.com](https://concur.com) or the [SAP Concur blog](#).

### CMPS Southeastern University enUS (19/12)

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