

## International Pharmaceutical Company

### From Assessment to a Successful Introduction of a New Travel and Expense Ecosystem.

A Concur Travel and Concur Expense solution delivers key improvements, addresses more than 100 business requirements.

#### The Challenge

*Changing to enable growth*

The client's executives and sales professionals travel constantly to execute the company's global strategy and maintain its position in the highly competitive pharmaceutical industry. The company's outdated processes and tools for managing travel posed a burden to maintaining nimble operations and rapid growth:

- ◆ Administrative assistants relied on outdated approaches for supporting travel
- ◆ Sales "road warriors" spent significant time recording their travel expenses, taking valuable time away from their clients
- ◆ The internal audit function required substantial manual effort to ensure compliance with regulatory requirements

The company sought a solution that would:

- ◆ Improve user experience by reducing the number of steps required to report and process expenses
- ◆ Integrate travel and expense management
- ◆ Provide greater visibility into P&L and regulatory implications of business expenses for both home- office employees and the sales force

#### The Solution

*Industry, process, and technology expertise guide the solution*

For assistance with capability assessment and solution design, the company turned to West Monroe Partners, which offered a strong blend of industry expertise and recent experience improving travel and expense management processes—particularly applying Concur solutions.

#### MORE EFFICIENT TRAVEL AND EXPENSE PROCESSES

- IMPROVES ADMINISTRATIVE AND TRAVELER PRODUCTIVITY
- ESTABLISHES GREATER TRAVEL AND EXPENSE TRANSPARENCY FOR COMPLIANCE PURPOSES
- PROVIDES A BETTER USER EXPERIENCE
- ALLOWS PERSONNEL TO REMAIN FOCUSED ON GROWTH GOALS

The client is a large international pharmaceutical company that specializes in products that target diseases such as depression and anxiety, psychotic disorders, epilepsy, Huntington's, Alzheimer's, and Parkinson's diseases.

The West Monroe Partners team first met with users across the business to identify and understand “pain points” related to entering and approving expenses and booking travel, reconciling data, and supporting the company’s out-of-date travel and expense environment.

The assessment revealed several key issues, including duplicate data, confusing data-entry fields, difficulty seeing expense data while approving expenses, lack of integration between the Concur expense system and the company’s travel system, and finally, use of multiple types of corporate credit cards, some of which did not integrate with Concur.

#### *A roadmap for change*

Applying significant technical Concur experience, the West Monroe team conducted a deeper evaluation of the company’s system to understand its ability to handle the desired business requirements. After validating its findings with system users, the team proposed a three-stage roadmap for updating the Concur Expense system to reflect new policy and compliance requirements and implementing Concur Travel to replace the existing system. The company then asked West Monroe Partners to execute the proposed roadmap.

#### *From design to successful deployment*

West Monroe held design sessions and documented the company’s future travel, expense, and credit card ecosystem. Then, they

orchestrated a smooth migration to the new and improved systems and processes over a weekend—with immediate positive impact on the business.

Change management was key to successful implementation. West Monroe Partners led nationwide training for the company’s sales force, line managers, and support staff. In addition, the West Monroe team developed a robust communication plan and continued to provide user support once system deployment was completed.

### **The Impact**

#### *Immediate positive business impact*

With current Concur Expense and Concur Travel capabilities in place and well integrated, the client is realizing many benefits, including:

- ◆ The internal audit and Sunshine Act compliance teams have greater visibility of sales force and home-office expenses.
- ◆ Updated expense policy configurations alleviated time-consuming bottlenecks for both sales and administrative personnel.
- ◆ In Concur Travel, the company gained a more user-friendly system and interface than its legacy system provided.
- ◆ The company was able to discontinue use of credit cards that did not integrate with Concur and thus required complicated reconciliation procedures.

