

# **Expense System Implementation**

**SCT&EM Conference**

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# Overview – Like a Recipe

- Reasons to implement 3<sup>rd</sup> party software
- Ingredients for a successful implementation
- Mixing your ingredients for best results
- Tasting your success

# Benefits

- One stop shop
- Quicker repayment for employees
- Efficiencies for end user, approver, and back office
- Cost savings for less administrative time
- Increased policy compliance

# Ingredients for success

- Senior management buy in
- Helpful to having policy mandating use
- Planning
- Allocating human resources
- Designating technical assistance
- Identifying stake holders and holding pilot group
- Training

# Mixing your ingredients

- Plan - Create a realistic timeline and adjust document as you go (list responsible party to complete task)
- Communicate - Provide rationale
- Use feedback and local resources

# Mixing your ingredients

- Use metrics
- Rely on implementation team and learn the “tech talk”
- Improvise when needed, but remember the big picture
- Be willing to be bossy with the vendor!

# Completed product

- What will it look like?
- Did you realize the benefits you were promoting?
- Provide Metrics!
- Celebrate your successes!

# What would I do differently?

- Secure more technical staff time
- Better grasp the “tech talk”
- Hold smaller pilot group over a longer period of time
- Release department by department
- Secure designated trainer



# Questions?

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