

Supporting University Travel

A Case Study: College of Design, School of Journalism and Clark Honors College

Challenge

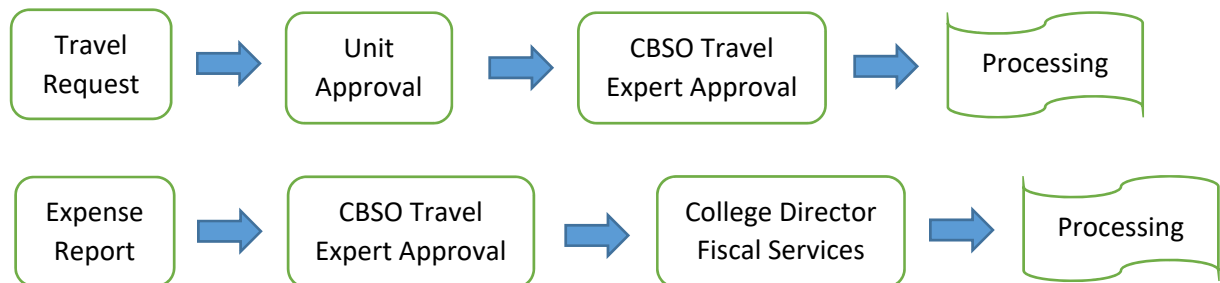
Train and support travelers as they begin to use the new travel management system, Concur

Goals

1. Expert support as and when needed
2. Faster reimbursement processing
3. Clear communication
4. Efficient use of personnel resources

Solution

1. Collaborate with business leaders in three schools and colleges to create a shared service strategy for supporting up to 600 travelers combined.
2. Dedicate one fiscal coordinator in Central Business Services Organization (CBSO) to support travel for all employees in the three schools/colleges.
3. Require that travelers complete their own travel request and expense report unless they have a dedicated administrative assistant serving as their travel delegate.
4. Create an approvals strategy for requests and expense reports:



5. Create a strategy for handling guest travel.
6. Clearly communicate this travel strategy to employees in all three schools and colleges.

Results

1. 80% of travelers are comfortable and confident Concur users.
2. 20% exhibit some frustration/resistance and are still learning how to create requests and expense reports. The CBSO takes these opportunities to explain the various system benefits including faster reimbursement turn around.
3. Brian Conley the CBSO Travel Expert contacts employees when he receives their first trip request to provide training and support.

4. Brian reviews all travel requests and expense reports for errors and omissions and suggests corrections.
5. Once Brian has reviewed the expense report for accuracy and completeness, the Director of Fiscal Services for college or school reviews it for accurate accounting.
6. Brian is training to be a travel processor. Once qualified all DSGN, SOJC and CHC expense reports will process immediately without requiring BAO Travel Office review and approval. Brian will meet regularly with campus travel processors for professional development.
7. CBSO has five accounting techs and is training another to review expense reports as back up for Brian.
8. Departmental travel delegates (administrators/event coordinators) prepare guest travel requests and expense reports.
9. The Provost office is considering joining this shared service organization for travel support.
10. CBSO finds that travelers who use the One Card have an easier time preparing their expense reports.
11. CBSO is beginning to promote Concur mobile.

Quotes:

“Faced with limited resources and new system to implement we got together with financial leadership in the School of Journalism and Clark Honors College and created a shared service strategy for travel that is working really well.”

Rocco Luiere, Assoc Dean Finance and Admin College of Design

“Brian Connely does an amazing job as delegate for all of our travelers. He contacts them before their first trip to get them oriented. 80% of our travelers are comfortable and confident using Concur, due in large part to Brian’s dedication and skill.”

Shaymond Michelson, Director Fiscal Services College of Design