Interview Notes – Expense Reimbursement Process

These notes summarize insights from three anonymized stakeholder interviews to understand current expense reimbursement workflows, pain points, and ideas for improvement.

**Interview 1**: **Vinay – Software Developer at ServiceNow**

1. Process Overview:

* Uses multiple platforms: Concur (medical), Health Connect, and Workday (LTA).
* Logs into platform, uploads invoices, fills out details → request goes through approval → reimbursement processed.

2. Pain Points:

* Time-consuming to find and upload bills.
* Framing the reason for the expense

3. Resubmission Experience:

* Example: Ordered photochromic glasses; cosmetic part rejected.
* Had to rebill the sight-correcting lens separately to get it approved.

4. Timeline:

* Typically submits on the final allowed day.
* Reimbursement usually happens within 1 day post-approval.

5. Suggested Improvements:

* A mobile app to track and flag reimbursable purchases automatically.
* Real-time eligibility checker for expenses.

**Interview 2: Kelly – Engineer at Zapier**

1. Process Overview:

* Reviews internal Notion reimbursement guide.
* Submits expenses via Expensify → routed to manager for approval → paid via Gusto payroll in next cycle.
* Status updates are sent through Slack.

2. Pain Points:

* Issues with receipt formatting and clarity.
* Manual entry for project codes/categories leads to occasional errors.
* Forgetting to submit receipts immediately can lead to loss or delay.

3. Resubmission Experience:

* Submitted under the wrong category once; manager flagged it; resubmitted after corrections.

4. Timeline:

* Usually reimbursed within 5–7 business days.
* Delays occur due to missing data, slow approvals, or payroll windows.

5. Suggested Improvements:

* Smart categorization (e.g., Udemy auto-tags as "Learning").
* Dashboard to track budget vs. remaining allowance.

**Interview 3: Harsha – Software Developer at Groww**

1. Process Overview:

* Logs into internal portal → manually enters expense details → uploads receipts → request goes to manager → accounting team verifies → reimbursement processed in salary.

2. Pain Points:

* Manual data entry is slow and error-prone.
* No visibility into where the request is stuck.
* Accounting re-verification feels redundant.

3. Resubmission Experience:

* Common due to blurry/cropped receipts, typos, or unclear policy application.
* mismatched amounts, missing attendee list, policy misinterpretation.

4. Timeline:

* Reimbursement typically takes 10–12 days.
* Delays caused by manager unavailability, accounting flags, or missing payroll cutoff.

5. Suggested Improvements:

* Mobile OCR scanning to auto-fill fields.
* Real-time policy validation.
* Automated syncing with finance system to eliminate manual entry.

**Summary of Key Themes:**

Manual Data Entry is a consistent bottleneck across all interviews.

Delays are most often due to human approvals, lack of automation, or errors in receipts/policy misinterpretation.

Desire for Automation: Smart tools that can scan receipts, auto-categorize, check policy compliance, and reduce approval loops.

Visibility & Tracking: Employees want to see real-time status and remaining budget caps for specific categories.