**Section 1: Interview Questions**

1. Can you walk me through your current expense reimbursement process, step by step?

2. What are the most time-consuming or frustrating parts of submitting expense reports?

3. Have you ever had to resubmit or correct an expense report? If so, why?

4. How long does it usually take from submission to reimbursement, and what factors influence that timeline?

5. If you could change one thing about this process, what would it be and why?

**Section 2: 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.

**Interview 4: Priyanka – Product Design Leader at Nelnet**

**1. Process Overview:**

* Collects all receipts (physical or digital).
* Logs into the expense reporting system.
* For each expense: enters the exact amount, selects the appropriate cost center, attaches the receipt.
* Reviews the full report for accuracy before submitting for approval.

**2. Pain Points:**

* Attaching receipts for each line item is tedious.
* Selecting the purpose for each expense from a long and sometimes confusing list of options is frustrating.
* Matching receipts correctly takes significant effort.

**3. Resubmission Experience:**

* Has had to correct/resubmit expense reports due to vague system errors.
* Error messages are often unclear, requiring her to contact the help desk or ask colleagues for help in understanding the issue.

**4. Timeline:**

* Time to reimbursement varies based on how fast approvals come from managers and finance.
* Volume of reports in the system also affects delays.
* Errors or missing information can cause significant slowdowns.

**5. Suggested Improvements:**

* Streamline the "purpose" dropdown to include fewer, more relevant categories.
* Ideally, personalize the options based on her role or past expenses to speed up selection.
* This would reduce frustration and improve efficiency.

**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.

**Section 3: Interview WhatsApp Screenshots**

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